Assessing HUD Technical Assistance Programs

Evaluating Change Since Implementation of Community Compass

PD&R

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TECHNICAL APPENDIX—INTERVIEW PROTOCOLS

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Contents

Interview Protocol for HUD Headquarters Staff

I. OFFICIAL ROLE (AT HUD AND WITH RESPECT TO HUD TA)

We'd like to start with a few questions about your role.

    A. Can you confirm your title and your office?
        1. How long you have been in this position?
        2. What are your primary responsibilities?
        3. How long have you been involved in technical assistance programs at HUD?
        4. What other program office(s) do you work with at headquarters?

II. TA PROCESS OVERVIEW

We want to turn to the TA process chart that you received via email. This chart represents the overview of the TA process as we understand it. We would like to review these steps with you to get your feedback on what we may have missed, and better understand YOUR INVOLVEMENT (if any) in each step. [Briefly describe the process reflected in the diagram.]

    A. What is your role in the TA process - from NOFA to TA provider selection, to management and closeout?
        1. [If tenure with HUD TA is more than 4 years/prior to 2014] Has your role changed since the TA process was reorganized under Community Compass? In what ways?
        2. What is your interaction with the other HUD headquarters staff and/or field offices? TA providers?? TA customers?
        3. How many TA projects have you worked on?
        4. How many TA engagements in the field have you worked on? Did it involve HUD field staff, providers, and/or customers?
    B. Does this diagram accurately reflect the current process for TA provision and recordkeeping?
        1. Are there other major steps that we've missed?
        2. What are the average times between the different steps?

III. SELECTION OF TA PROVIDERS

Now we'd like to discuss the process that HUD uses to select TA providers from the NOFA applicants. [Point to box 3 in the diagram]

    A. Is your office involved in selecting the criteria and/or in evaluating applications (as published in the NOFA)? If so, how?
    B. Who selects the TA providers from the NOFA applicants?
        1. How is your office involved in selecting TA providers?
        2. Does your involvement change depending on program/program office?

C. [If tenure with HUD TA is more than 4 years/prior to 2014] Has the selection process in your program office changed since the reorganization under Community Compass? If so, how? [Probe: criteria for selection; review panels; program office involvement?]
   1. Are any characteristics of TA providers/TA content/delivery methods given greater weight now than they were prior to FY 2014?
   2. [If the process has changed] How has the change in process mattered for your office? For applicants?
   3. Are the outcomes of selection decisions different in any way from past TA programs?

IV. TYPES of TA and RECEIPT/APPROVAL PROCESS OF TA REQUESTS

Next, we'd like to ask about the types of TA that your Program Office manages and how your Program Office receives and reviews TA requests.

A. What are the types of TA that your program office manages and delivers? [*Refer to Types of TA Matrix/Table*]
   1. Does your office manage/oversee Universal TA? Can you identify which types of Universal TA are the most commonly delivered?
   2. Does your office manage/oversee direct TA? Can you identify which types of direct TA are the most commonly delivered?
   3. How many staff in your program work on universal TA/direct TA?
B. What are the ways in which TA is requested? [Refer to the TA Process Diagram]
   1. Probes: Through the TA Portal? From direct conversations with the customers? From a HUD headquarters staff?
   2. Why are there different ways the TA is requested?
      i. Probe: By the type of TA being requested? By the type of customer? By program office? By the type of need or content area?
   3. Does your involvement differ by whether the TA is voluntary or required?
C. Are all records of TA requests kept in the TA Portal, or are there other management systems/mechanisms in use?
   1. Who enters these requests?
   2. Are you able to view TA requests/provide input in the Portal or other systems?
   3. Can you make comments or add information to the TA Portal?
D. Does your office play a role in the decision making on the appropriate TA to offer? Please describe.
   1. If so, what criteria does your program/office use to evaluate requests for TA?
   2. What factors are considered in the decision-making process?
      i. Probe: TA content and delivery methods? Past customer requests and outcomes? Availability of funds? Policy priorities? Others?
E. How are providers selected to provide the different TA projects?
F. [If tenure with HUD TA is more than 4 years/prior to 2014] Have the processes for evaluating requests changed since the reorganization under Community Compass? If so, please describe the change. (Probes: changes in this office's process; changes in the role of regional or field offices)

V.   TA DELIVERY AND TRACKING/OVERSIGHT

Now we'd like to ask you about the process for tracking TA engagement. [Point to boxes 6 and 7 in the diagram]

    A. Does your office generally provide any specific oversight or engagement to a TA project once it is assigned to a provider?
        1. If so, who is involved and what is their role?
    B. Do you regularly track activities in HUD's TA Portal? In DRGR?
        1. If so, do you see the monthly status reports and narratives from TA providers or customers?
    C. [If tenure with HUD TA is more than 4 years/prior to 2014] Has the tracking and oversight process changed from prior to the Community Compass transition? If so, how?
        1. [If yes] How have the changes mattered for HUD? For providers?
    D. Do TA customers generally have the opportunity to provide feedback on the TA provided?
        1. Is the feedback provided in response to a request from HUD or is it customer initiated?
        2. What are the mechanisms for providing feedback (e.g., Through the TA Portal, directly via email, etc.)?
        3. Do many customers provide feedback?

VI.   WRAP UP

We'll wrap up with some big-picture questions.

    A. [If tenure with HUD TA is more than 4 years/prior to 2014] What are the biggest changes overall since the TA process was reorganized under Community Compass?
        1. [For HUD TA staff at HUD since prior to 2014: What effect has the change to Community Compass in 2014 (from "program-specific" TA to "cross-program" TA) had on TA processes?
        2. Have the roles and responsibilities among program offices changed? If so, how?
    B. Are there steps in the process that have improved/become more efficient or effective since the reorganization under Community Compass? Are there aspects that have become more difficult/less effective?
        1. Do you think the transition has increased internal coordination across TA programs?
            i. Can you provide a couple examples of increased coordination?
        2. Do you think the transition has led to improved coordination and communication across TA providers? Why or why not?
        3. Do you think Community Compass has led to the use of standardized materials across TA providers?
        4. What do you think the TA providers or HUD staff could do to reduce the duplication or lack of standardization?
    C. What, if any, improvements would you recommend to the current TA process?

1. Are there specific changes to the process or data systems that could improve HUD's TA for customers, providers, or HUD staff/program offices?
D. Is there anything else you think we should know about the TA request and delivery process or the transition to Community Compass that we have not asked about yet?
E. As part of this project, we will conduct a few case studies and have a few options for structuring the studies. These include focusing on: 1) **a single place**, such as New Orleans, and examining all the recent TA provided there, or 2) **a TA customer**, such as a city housing department or a nonprofit organization, that has received multiple types of TA, or 3) **a type of TA**, such as a training curriculum or program that is offered to a variety of customers across several places.
   1. Among these different approaches, which do you think would be most informative for understanding how HUD provides TA today?

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

Interview Protocol for HUD Field Staff

I. OFFICIAL ROLE (AT HUD AND WITH RESPECT TO HUD TA)

We'd like to start with a few questions about your role.

    A. Can you confirm your title and your office?
        1. How long you have been in this position?
        2. What are your primary responsibilities?
        3. How long have you been involved in technical assistance programs at HUD?
        4. What program office(s) do you work with at headquarters?

II. TA PROCESS OVERVIEW

We want to turn to the TA process chart that you received via email. This chart represents the overview of the TA process as we understand it. We would like to review these steps with you to get your feedback on what we may have missed, and better understand YOUR INVOLVEMENT (if any) in each step. [Briefly describe the process reflected in the diagram.]

    A. What is your role in the TA process - from NOFA to TA provider selection, to management and closeout?
        1. [If tenure with HUD TA is more than 4 years/prior to 2014] Has your role changed since the TA process was reorganized under Community Compass? In what ways?
        2. What is your interaction with the HUD headquarters staff? TA providers?? TA customers?
        3. How many TA engagements have you worked on? How many providers? How many customers?
    B. Does this diagram accurately reflect the current process for TA provision and recordkeeping?
        1. Are there other major steps that we've missed?
        2. What are the average times between the different steps?

III. RECEIPT/APPROVAL PROCESS OF TA REQUESTS

Next, we'd like to ask about how HUD receives and reviews TA requests. [Point to boxes 4 and 5 in the diagram]

    A. How is your field office/local office involved in TA requests? How do you work with customers and HUD headquarters staff?
        1. Does your involvement differ by program office?
    B. What types of TA can be required by HUD?
        1. Probe: For example, on-call TA, direct TA, needs assessment, trainings and self-guided learnings, or tools and products

2. Does your involvement differ by whether the TA is voluntary or required?
C. What are the ways in which TA is requested?
    1. Probes: Through the TA Portal? From direct conversations with the customers? From a HUD headquarters staff? Any other way?
    2. Why are there different ways the TA is requested?
        i. Probe: By the type of TA being requested? By the type of customer? By program office? By the type of need or content area?
D. Are all records of TA requests kept in the TA Portal, or are there other management systems/mechanisms in use?
    1. Who enters these requests?
    2. Are you able to view TA requests/provide input in the Portal or other systems?
    3. Can you make comments or add information to the TA Portal?
E. Does your office play a role in the decision making on the appropriate TA to offer? Please describe.
    1. If so, what criteria does your program/office use to evaluate requests for TA?
    2. What factors are considered in the decision-making process?
        i. Probe: TA content and delivery methods? Past customer requests and outcomes? Availability of funds? Policy priorities? Others?
F. How are providers selected to provide the different TA projects?
G. [If tenure with HUD TA is more than 4 years/prior to 2014] Have the processes for evaluating requests changed since the reorganization under Community Compass? If so, please describe the change. (Probes: changes in this office's process; changes in the role of regional or field offices)
H. Are you involved in regionally coordinated TA? If so, how?

IV.   TA DELIVERY AND TRACKING/OVERSIGHT

Now we'd like to ask you about the process for tracking TA engagement. [Point to boxes 6 and 7 in the diagram]

A. What are the most frequently used types of TA in your office or region? Which are less frequently used?
B. Does your office generally provide any specific oversight or engagement to a TA project once it is assigned to a provider?
    1. If so, who is involved and what is their role?
C. Do you have access to the HUD TA Portal? To DRGR?
    1. If so, do you see the monthly status reports and narratives from TA customers?
D. [If tenure with HUD TA is more than 4 years/prior to 2014] Has the tracking and oversight process changed from prior to the Community Compass transition? If so, how?
    1. [If yes] How have the changes mattered for HUD? For providers?
E. Do TA customers generally have the opportunity to provide feedback on the TA provided?
    1. Is the feedback provided in response to a request from HUD or is it customer initiated?

2. What are the mechanisms for providing feedback (e.g., Through the TA Portal, directly via email, etc.)?
3. Do many customers provide feedback?

V.   WRAP UP

We'll wrap up with some big-picture questions.

A.   [If tenure with HUD TA is more than 4 years/prior to 2014] What are the biggest changes overall since the TA process was reorganized under Community Compass?
   1.   [For HUD TA staff at HUD since prior to 2014: What effect has the change to Community Compass in 2014 (from "program-specific" TA to "cross-program" TA) had on TA processes?
   2.   Have the roles and responsibilities among program offices changed? If so, how?
B.   Are there steps in the process that have improved/become more efficient or effective since the reorganization under Community Compass? Are there aspects that have become more difficult/less effective?
   1.   Do you think the transition has increased internal coordination across TA programs?
        i.   Can you provide a couple examples of increased coordination?
   2.   Do you think the transition has led to improved coordination and communication across TA providers? Why or why not?
   3.   Do you think Community Compass has led to the use of standardized materials across TA providers?
   4.   Do you think Community Compass has led to the use of standardized processes across TA providers?
   5.   What do you think the TA providers or HUD staff could do to reduce the duplication or lack of standardization?
C.   We discussed this earlier when we looked at the diagram but are there any other data systems we should know about that are used to capture TA assistance and outputs?
D.   What, if any, improvements would you recommend to the current TA process?
   1.   Are there specific changes to the process or data systems that could improve HUD's TA for customers, providers, or HUD staff/program offices?
E.   Is there anything else you think we should know about the TA process or the transition to Community Compass that we have not asked about yet?
F.   As part of this project, we will conduct a few case studies and have a few options for structuring the studies. These include focusing on: 1) a single place, such as New Orleans, and examining all of the recent TA provided there, or 2) a TA customer, such as a city housing department or a nonprofit organization, that has received multiple types of TA, or 3) a type of TA, such as a training curriculum or program that is offered to a variety of customers across a number of places.
   1.   Among these different approaches, which do you think would be most informative for understanding how HUD provides TA today?

2. Do you have any suggestions for case studies, particularly of a local jurisdiction in your region that has received a large amount of TA across multiple HUD HUD programs or over time?

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

Interview Protocol for TA Providers

I. BACKGROUND AND ORGANIZATIONAL INFORMATION

We would like to start with a few background questions about your organization/company, your roles, and general experience with providing technical assistance.

A. Can you confirm your title?
   1. Please describe your roles and responsibilities.
   2. How does this relate to the TA your organization/company provides?
B. Where does TA fit within your organization's business model?
   1. For clarification, is providing TA a central aspect of your organization's services?
C. Overall, how many people in your organization/company are involved in providing TA?
   1. How are staff allocated among TA roles? (e.g., Support/Logistics, Instructors, Designers, Evaluators, etc.).
   2. Do you use subcontractors to deliver TA? If so, what roles do they generally play?

D. We are aware that you have been awarded a contract/cooperative agreement to provide TA for certain HUD programs:

   1. What HUD TA contracts and/or cooperative agreements does your organization currently manage? Can you confirm the year awarded, the total amount, and the program office?
   2. Which program offices at HUD have funded your TA activities (since 2014)?
      a. For which program was the most recent application?
      b. Do you typically apply to provide TA through the same HUD programs? Why, or why not?
   3. Who do you collaborate with as part of your TA engagements since 2014? Staff at HUD headquarters? HUD field offices? Other TA providers?
      a. Can you describe the nature of these collaborations?
      b. Have they helped or hindered the TA process and/or delivery of the TA?
      c. Does HUD's TA approach encourage or hinder these collaborations?
   4. Looking at the TA Matrix we sent you, can you list the types of TA you provide since 2014? (*Refer to our TA Matrix emailed ahead of the interview;*

> *for example, direct TA, on-call TA, needs assessments, trainings, or product creation).*

    5. Of the TA, you provided since 2014, have you worked on TA projects that HUD required the customer to take rather than TA requested by the customer?

        a. Of the TA, you provided since 2014, what percentage was for TA required by HUD vs. what percentage was voluntary?

    6. Did you provide TA before 2014?

        a. For which programs, did you provide this earlier TA?

        b. What types of TA did you provide? (Probe: on-call TA, direct TA, needs assessment, trainings and self-guided learning online, or tools and products such as manuals or handouts accessible through HUD Exchange)

[*Based on their responses*] Let's first focus on your TA experience with [select one of the types of universal TA or targeted TA] and go through these questions.

[Internal Guidance: focus first on the TA types that we have not heard as much about from previous interviews and then go to other types depending on time, etc.]

II.   THE TA PROCESS

    A.   TA REQUESTS

      1. How many staff within your organization support this type of TA (*insert TA type here*)?

        a. Can you briefly describe their roles and responsibilities?

        b. What is your role on this HUD TA program?

      2. Describe your organization's process for receiving TA requests from HUD.

        a. Is there a primary point of contact at HUD who sends the TA requests or do the requests come from multiple avenues depending on the type of TA?

        b. How do you get the requests? Through the TA Portal or other mechanism?

            i. Which TA requests come through the TA Portal?

            ii. Do you see any trends between the types of requests, either by topic or by TA type that come through the TA Portal and those requests that come through other mechanisms?

        c. What do you do once receive a request? Please outline the various steps.

        d. How many TA requests do you get each quarter from HUD?

        e. How often did your HUD program officer in review your activities during the processing of the TA requests?

            i. Is your relationship primarily with HUD headquarters staff? Or field staff?

        f. Any challenges you and/or your team experienced during the TA request process?

        g. Any changes you would make if you could to the TA request process?

B. DELIVERY OF TA

1. For the (*insert TA type*), you deliver, how long does it generally take (on average) from receipt of the HUD TA request to sending a notice to the TA customer that they have been selected?
    a. Who is involved in this process? (Prompt: HUD headquarters staff, field staff, others)
2. [Ask if they are not in the interview] Does your TA approach involve subcontractors? If so:
    a. Why do you work with subcontractors?
    b. What types of services or expertise do they provide—e.g., support/logistics instruction?
    c. How many subcontractors are involved with this type of TA?
3. Is your organization responsible for notifying and scheduling the TA activity with the TA recipient(s)?
    a. If so, please describe the roles and the process.
4. Is your organization responsible for developing the work plan (e.g., curriculum and instructional goals for the TA)?
    a. If so, please describe the roles and the process.
5. What role, if any, does your HUD program officer have in reviewing your delivery of the TA, such as input regarding the format and/or curriculum and goals?
    a. How do the reviews take place? (phone calls, emails, visits, conferences, meetings, etc.)
    b. How often do the reviews happen?
    c. Are the reviews helpful?
    d. Do you get input or feedback from others at HUD (e.g., the field office)?
6. Any challenges you and/or your team experienced during the TA delivery process?
7. Any changes you would make if you could to the TA delivery process?

III. REPORTING AND OVERSIGHT OF TA

A. Can you describe the process for reporting to HUD?
    1. What types of information do you track?
    2. Do you use the DRGR system? If yes, what data is entered in the DRGR?
    3. What other data systems do you use, if any?
B. What, if any, outcomes or results from the TA have you documented?
    1. Do you track or document these outcomes? Why or why not?
    2. Any examples that you can share?
C. How often are you required to enter data?
D. Are there any repercussions if you do not complete data entry?
E. Are you required to provide written reports to HUD?
    1. If so, what are you required to report on and how? (e.g., data submission, standardized performance tracking measures, a qualitative template, an informal check in).

F. Who do you report to at HUD?
    1. How often do you speak with your HUD program officer?
    2. How often do you meet with them?
    3. Has your HUD program officer or other HUD staff observed your TA activities in the field?
G. Any challenges you and/or your team experienced during the reporting process? [e.g. TA portal, DRGR, with data to be reported, etc.]
H. Any changes you would make to the reporting and TA oversight process?

IV.   FEEDBACK ON TA ACTIVITIES

These sections relate to receiving feedback from TA customers and providing feedback to HUD staff about TA delivery.

A. Soliciting Feedback
    1. Do you solicit feedback from the TA subcontractors and/or instructors?
        a. If so, what type of feedback did you request [the overall TA process, the instructors' approach, the course itself, the product, etc.]
        b. How do you get the feedback? Can you provide an example?
    2. Do you soliciting feedback from TA customers involved with the TA activity/project?
        a. If so, what type of feedback did you request [the overall TA process, the instructors' approach, the course itself, the product, etc.]
        b. How do you get the feedback? Can you provide an example?
B. Do you revise and improve the TA [materials, approach, workshops, etc.] based on feedback?
    1. Can you provide an example?
C. Do you provide regular feedback to HUD about your TA activities/projects?
    1. If so, how is the feedback conveyed to HUD? [emails, HUD trainings, quarterly meetings, conference calls, etc.]
        a. Can you provide an example?
    2. If so, how often/how regular is the feedback?
    3. If not, would you like the opportunity to give (more) feedback to HUD about the TA programs?
        a. In what formats, would you like to give feedback? (Probe: through direct check-ins, focus groups, email, an anonymous survey/web Portal)

V.   ASSESSMENT AND REFLECTIONS ON THE TA

A. Did the [type of TA] you provide meet the customers' need or lead to better program or organizational coordination?
    1. Why or why not?
    2. How do you determine this?

B. Has your agency/organization tried to assess the outcomes or impact of the recent TA you've provided?
    1. If so, how did you assess it?
    2. If so, what was found to be the short-term outcomes or impacts from the TA?
    3. Did/will the TA facilitate any longer-term outcomes or impact?
        a. If so, please describe.
C. If you have other noteworthy experiences with HUD TA, please briefly describe the supported project, type of TA, and highlight any main successes or challenges with this experience.

VI.   WRAP UP

A. Is there anything else you would like to add about HUD's TA program and your experience as a HUD TA Provider, or anything we've discussed today?
B. Do you have any questions for us?

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

Interview Protocol for TA Customers

I.   BACKGROUND AND ORGANIZATIONAL INFORMATION

We would like to start with a few background questions about your organization, your roles, and general experience with receiving technical assistance.

A. Can you confirm your title?
B. Please describe your roles and responsibilities.
C. How long have you been with this agency / organization?
D. Which HUD programs does your agency/organization currently administer?
E. For which HUD programs have you applied for TA since 2014?
    1. For which program was the most recent application?
F. For which HUD programs, have you received TA since 2014?
    1. What types of TA have your received? For example, on-call TA, direct TA, needs assessment, trainings and self-guided learning online, or tools and products such as manuals or handouts accessible through HUD Exchange. Did you use the Ask-A-Question feature on HUD Exchange?
    2. When were each of these TA projects delivered?
G. Did you receive TA before 2014?
    1. For which programs did you receive this earlier TA?
    2. What types of TA did you receive? (Probe: on-call TA, direct TA, needs assessment, trainings and self-guided learning online, or tools and products such as manuals or handouts accessible through HUD Exchange)

Now, let's focus on your TA experience with _____.

II.   TARGETED TA (ON-CALL, DIRECT OR NEEDS ASSESSMENT TA)
A. TA REQUESTS and APPROVAL
    1. How did you/your agency / your organization learn about the availability of HUD TA for the most recent TA experience?
    2. Was this TA required by HUD or was it voluntary?
        a. If voluntary, what motivated you to request TA?
        b. If required, what were the reasons that it was required by HUD?
    3. Describe the process for requesting TA from HUD for (insert name of TA project).
        a. Did HUD require you/your organization to apply/complete an application?
        b. How was your experience with the application process? (Probe: time taken, effort burden, clarity of instructions/steps?)
        c. Did you have to supply any additional information after your initial submission?
            i. If so, what information did you supply?

      d. Where did you submit your application/request for TA?
         i. Are they sent to a specific office/member of HUD staff?
      e. How long did it take from the time you submitted the request to when you received notice of approval for the TA activity request?
      f. What office or program at HUD approved your TA request/application?
    4. Have you applied for other TA without success, leading to unmet needs for TA?
      a. If so, please explain.

  B. DELIVERY OF TA
    1. How long did it take from the time you received notice of the TA approval for (name of project) for the TA work to begin?
    2. How long did it take from the time you started the TA work to the completion of the project?
    3. Describe the TA activity that you and/or others in your agency/organization attended or received.
      a. What was/were the topic(s) of the TA?
      b. How many people from your office or organization participated in or received TA from this request?
      c. Who delivered/who was involved with the TA?
         i. What were their credentials/expertise on the topic?
         ii. Did they have previous experience delivering TA?
         iii. How did they deliver the TA? (e.g., in-person workshop or convening, on call coordination/meetings, onsite coordination/meetings, etc.?)
         iv. How often did you have contact with the TA provider team? (Probes: over email, over the phone, in person)
    4. [If they have received TA from multiple program offices] How does the process compare to TA provided through other HUD programs?

III. UNIVERSAL TA (TRAININGS AND SELF-GUIDED LEARNING, TOOLS AND PRODUCTS, AND ASK-A-QUESTION FEATURE)

  A. TRAININGS AND SELF-GUIDED LEARNING [IF APPLICABLE]
    1. How did you/your agency / your organization learn about the availability of the training or self-guided learning opportunity?
    2. Will you briefly describe the training/self-guided learning opportunity and who participated in it?
    3. What motivated you to participate?
    4. Did you find the activity to be helpful in meeting your goals?
    5. Are there any topics you would like to see covered in future trainings or self-guided learning that you do not have access to now?

  B. TOOLS AND PRODUCTS [IF APPLICABLE]
    1. How did you/your agency / your organization learn about the tool/product?

2. Will you briefly describe the tool/product you used and how you used it?
3. Did you find the tool/product to be helpful in meeting your goals?
4. Are there any tools or products you would like to see that you do not have access to now?

C. ASK-A-QUESTION FEATURE [IF APPLICABLE]
1. What did you use the Ask-A-Question feature for?
2. Were you able to get a resolution to your question/answer?
3. Do you have any suggestions for how the Ask-A-Question feature should change?

IV. REPORTING AND OVERSIGHT OF TA
A. Are you required to report on the TA activities?
1. Can you describe the HUD reporting process?
   a. What type of data do you report regarding the TA that you receive?
   b. What data systems does your team use to report TA progress or progress towards goals that the TA is assisting with?
   c. How often does your team enter information into the databases?

V. FEEDBACK ON TA ACTIVITIES
A. Did you have the opportunity before or after the TA to provide feedback about your TA?
1. If so, how did you provide the feedback? (Prompt: through what mechanism and to whom)
2. Did you see any response or changes made based on this feedback?
B. Would you like the opportunity to give (more) feedback to HUD about the TA programs?
1. In what formats would you like to give feedback? (Probe: through direct check-ins, focus groups, email, an anonymous survey/web Portal)
   a. To whom would you like to give feedback—directly to the provider/instructor or HUD?

VI. ASSESSMENT AND REFLECTIONS ON THE TA

A. Did the most recent TA meet your agency's / your organization's expectations and goals?
1. Why or why not?
2. Are there other activities or issues within your organization or community that could benefit from this or other types of HUD TA?
B. What difference did the TA make in addressing the issue or challenge that prompted you/your organization to seek HUD TA?
1. Did the TA you received lead to better program or organizational coordination? Why or why not?
2. Did the TA you received lead to better program or organizational collaboration? Why or why not?

C. Did you participate in the TA program before 2014 (when Community Compass began)?
1. If so, has the process changed for you before and after 2014?
2. If so, what kind of changes did you experience (positive/negative)?
D. What recommendations would you make to improve HUD TA processes and systems?
1. Probe: Such as improvements to the TA Portal, applications, feedback system, review process, assessment process, or the accessibility and availability of the TA process.
E. Has your agency/organization assessed the outcomes or impact of the recent TA you've received?
1. If so, how did you assess it?
2. If so, what was found to be the short-term outcomes or impacts from the TA? (e.g., for you individually, for colleagues/staff, for program/project, for agency/organization, for the community?)
3. If not, what do you think was the short-term outcome or impact from the TA? (e.g., for you individually, for colleagues/staff, for program/project, for agency/organization, for the community?)
4. Did/will the TA facilitate any longer-term outcomes or impact?
a. If so, please describe.
F. If you have other noteworthy experiences with HUD TA, please briefly describe the supported project, type of TA, and highlight any main successes or challenges with this experience.

VII. WRAP UP
A. Is there anything else you would like to add about being a HUD TA Customer, or anything we've discussed today?
1. Do you have any questions for us?
2. May we follow-up with you if any other questions arise?
a. [If yes, exchange contact information for follow-up opportunities]

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

PHA HUD Headquarters Staff Interview Protocol

I.   OFFICIAL ROLE (AT HUD AND WITH RESPECT TO HUD TA)

We'd like to start with a few questions about your role.

A. Can you confirm your title and your office?
   1. How long you have been in this position?
   2. What are your primary responsibilities?
      i. What are your responsibilities around technical assistance for PHAs? What about for particularly troubled PHAs?
   3. How long have you been involved in technical assistance programs at HUD?

II.   TA PROCESS OVERVIEW

We want to turn to the TA process chart that you received via email. We now want to explore in on the TA administered to troubled PHAS. This chart represents the overview of the TA process as we understand it. We would like to review these steps with you to get your feedback on what we may have missed, and better understand YOUR INVOLVEMENT (if any) in each step. [Briefly describe the process reflected in the diagram.]

A. What is your role in the TA process for troubled PHAs - from NOFA to TA provider selection, project and task development, to management and closeout? *Probe: Has your role changed overtime? In what ways?*
   1. What is your interaction with the other HUD headquarters staff and/or field offices? TA providers? TA customers?
   2. How many TA projects have you worked on? What share have focused on PHAs? On troubled PHAs?
B. Does this diagram accurately reflect the current process for TA provision and recordkeeping?
   1. Are there other major steps that we've missed?
   2. What are the average times between the different steps?
   3. Are there any major differences for the TA provided to troubled PHAs as opposed to PHAs that do not have a troubled status? If so, what are those differences?

III.   TYPES of TA and RECEIPT/APPROVAL PROCESS OF TA REQUESTS

Next, we'd like to ask about the types of TA that PIH manages and how PIH receives and reviews TA requests from troubled PHAs.

A. How is TA targeted at troubled PHAs?
   1. How is the need identified?
   2. How is the TA allocated for projects?
   3. Is there a difference for PHAs administering the public housing or Housing Choice Voucher programs?

       4.   Has this process changed since you began working HUD TA?

B.   What types of TA does your office use? [*Probe: on-call TA, direct TA, needs assessment, trainings and self-guided learning online, or tools and products*]

       1.   Can you identify which types of TA are the most commonly delivered?

C.   What are the content areas that your TA covers?

D.   How is TA targeted at troubled PHAs in particular?

       1.   What types of TA do you offer for troubled PHAs?

       2.   Are there certain types of TA that seem to work better than others?

E.   How does a troubled PHA request TA?

       1.   *Probes: Through the TA Portal? From direct conversations with HUD headquarters staff? From field staff?*

       2.   Does the submission process differ for PHAs with a troubled designation?

       3.   Are PHAs in troubled status given any special consideration for receiving TA?

F.   Is there any TA that is required for troubled PHAs?

       1.   Is there any that is required for all PHAs?

       2.   [*If required TA*] How is that requirement communicated to the PHA?

       3.   [*If required TA*] How is participation tracked? [Self-reported? Provider reported? Tracked through web program completion for TA like Lead the Way?]

       4.   [*If required TA*] What happens if the PHA does not participate even when required?

G.   How is it determined what types of TA and subject matter would be best for a troubled PHA to receive?

       1.   *Probe: PHA determines and applies or HUD suggests TA?*

       2.   Is TA targeted in any way toward the PHAS/SEMAP score areas that the PHA scored low in?

       3.   How is the TA work scoped out?

H.   What criteria does your program/office use to evaluate requests for TA?

       1.   *Probe: TA content and delivery methods? Past customer requests and outcomes? Availability of funds? Policy priorities? Others?*

IV.   SELECTION OF TA PROVIDERS

Now we'd like to discuss the process that HUD uses to select TA providers from the NOFA applicants. [Point to box 3 in the diagram]

A.   How are TA providers assigned to administer different TA projects for troubled PHAs?

       1.   Are any characteristics of TA providers/TA content/delivery methods given greater weight?

       2.   Has this process changed overtime? If so, how?

           i.   *Probe: Has this changed the TA experience in any noticeable way for your office? For your applicants? For your TA customers?*

V.   TRACKING/OVERSIGHT AND IMPACT

Now we'd like to ask you about the process for tracking TA engagement.

A. Does your office generally provide any specific oversight or engagement to a TA project once it is assigned to a provider?
   1. If so, who is involved and what is their role?
   2. How is this different for TA engagements for troubled PHAs? (*Probe: Are there any special considerations, oversight, or support for troubled PHAs that are not applied in other contexts?*)
B. Do you regularly track activities in HUD's TA Portal or in DRGR?
   1. If so, what are you responsible for entering? How is that data used?
   2. Is this data leveraged to track process outcomes? How about impact?
      i. Please describe how outcomes and impact are analyzed and how that information is used.
C. How does performance (such as participation or measurable changes) in TA affect the troubled PHA or the TA they receive?
   1. Is there any priority for additional TA based on the PHA's performance with the TA?
   2. Are there any actions taken if a PHA is not responding to the TA provided? (*Probe: For example, if they fail to participate, if they do not implement the recommended changes provided by the TA, or show no improvement?*)
D. [*If tenure with HUD TA is more than 4 years/prior to 2014*] Has the tracking and oversight process changed from prior to the Community Compass transition? If so, how?
   1. [*If yes*] How have the changes mattered for the implementation of troubled PHA TA?
E. Do TA customers generally have the opportunity to provide feedback on the TA provided?
   1. Is the feedback provided in response to a request from HUD or is it customer initiated?
   2. What are the mechanisms for providing feedback (e.g., through the TA Portal, directly via email, etc.)?
   3. Do many customers provide feedback?
   4. How do you use customer feedback to improve future TA?
F. Have you observed any impacts on troubled PHAs from the TA? If so, what impacts?
   1. How are improvements measured?
   2. Have you observed differences in impact based on the way the TA was delivered? If so, what differences?
      i. *Probes: Type of TA, subject matter, or the way the provider interacted with the customer? The receipt of TA being required?*
      ii. Have you used this information to change the way TA is administered? If so, how?
         1. Have there been any types of TA that you have discontinued based on ineffectiveness? If so, please explain.
   3. Have you observed differences in impact based on characteristics of the PHAs? For example, an Executive Director who is more open/engaged in the TA administration process, or based on the different score areas that put them in troubled status?
      i. If so, what differences and characteristics?
      ii. Have you used this information to change the way TA is administered? If so, how?

VI.   WRAP UP

We'll wrap up with some big-picture questions.

A.   [*If tenure with HUD TA is more than 4 years/prior to 2014*] What are the biggest changes overall since the TA process was reorganized under Community Compass?
   1.   What effect has the change to Community Compass in 2014 (from a program-specific model to a model that coordinates TA across programs) had on TA processes?
   2.   Have the roles and responsibilities among program offices changed? If so, how?
B.   Are there steps in the process that have improved/become more efficient or effective since the reorganization under Community Compass? Are there aspects that have become more difficult/less effective?
   1.   Do you think the transition has increased internal coordination across TA programs?
         i.   Can you provide a couple examples of increased coordination?
   2.   Do you think the transition has led to improved coordination and communication across TA providers? Why or why not?
   3.   Do you think Community Compass has led to the use of standardized materials across TA providers?
   4.   What do you think the TA providers or HUD staff could do to reduce the duplication or lack of standardization?
C.   What, if any, improvements would you recommend to the current TA process?
   1.   Are there specific changes to the process or data systems that could improve HUD's TA for customers, providers, or HUD staff/program offices?
D.   Is there anything else you think we should know about the TA request and delivery process or the transition to Community Compass that we have not asked about yet?

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

PHA TA Provider Interview Protocol

I.   BACKGROUND AND ORGANIZATIONAL INFORMATION

We would like to start with a few background questions about your organization/company, your roles, and general experience with providing technical assistance.

    A. Can you confirm your title?
        1. Please describe your roles and responsibilities.
    B. What are the subject matter areas of the TA that your organization provides?
        1. For which HUD program offices do you provide TA [e.g., PIH, ONAP]?
    C. What types of TA does your organization deliver (*for example, direct TA, on-call TA, needs assessments, trainings/webinars, or product creation*)?
        1. Does your organization (or you personally) specialize in any particular TA (type or subject matter)?
    D. What share of your TA is provided to PHAs?
        1. In particular, what share is provided to troubled PHAs? (*Probe: PHAs with financial difficulties or property management challenges*)
        2. Are all the types of TA your organization provides used with troubled PHAs? If not, which types of TA are used with troubled PHAs?
    E. Do you use subcontractors to deliver TA? If so, what are your primary reasons for doing so?
    F. Have you worked on TA projects in the last 3 or 4 years that HUD required the customer to take rather than TA requested by the customer?
        1. If so, what percentage would you estimate was for TA required by HUD vs. TA that was voluntary?

II.   THE TA PROCESS

Now we are going to focus on the TA you provide to PHAs and particularly to troubled PHAs. We are going to start with the TA request process.

    A. TA REQUESTS
        3. Describe your organization's process for receiving TA assignments from HUD for troubled PHAs.
            a. Is this different for troubled PHAs than for non-troubled PHAs?
            b. Is there a primary point of contact at HUD who sends the TA requests or do the requests come from multiple avenues depending on the way the TA is assigned? (*Prompt: HUD headquarters or field offices? Which program offices?*)
            c. How do you actually receive the requests? Through the TA Portal or some other mechanism?
        4. On average how many troubled PHA TA requests do you receive each year from HUD?

5. [*If they administer required TA*] For required TA, who communicates with the PHA that the TA is required?
6. The Community Compass NOFA process for awarding TA cooperative agreements launched in FY2014. Did your organization provide TA for PHAs and specifically troubled PHAs under previous TA awards?
    a. Are you aware of any changes to the way TA requests have been awarded since the transition to the Community Compass program?
        i. If so, what did those changes look like?
    b. Were there any changes to whether TA has been required or voluntary? What are those differences?

B. DELIVERY OF TA
    1. How long does it generally take (on average) from receipt of the troubled PHA TA request to the start of TA delivery? What happens during this time?
    2. With whom are you typically working to scope out the requirements of the TA work and develop the work plan? (*Probes: HUD headquarters? Field staff? The PHA?*)
        a. What does that process look like?
        b. How do you determine what type of TA and what subject matter topic each troubled PHA requires?
    3. Please give a quick overview of what types of TA you deliver to troubled PHAs? (*Probe: by type of TA*)
        a. Is there any TA that you administer to both troubled and non-troubled PHAs? If so, what TA?
        b. [*If they administer required TA*] Are there any key differences in TA delivered to fulfill voluntary requests versus mandatory TA?
            i. If so, what?
    4. Are you aware of any changes to the way your organization delivered TA based on the change to the Community Compass program?
    5. Of the TA that you deliver to trouble PHAs, what types are standardized in some way versus uniquely customized to specific TA requests (e.g., topic being addressed, type of delivery)?
        a. [*If both*] How do you determine if you should apply standardized or customized TA?
        b. [*If standardized at all*] Do you coordinate with other providers to design the standardized TA?
            i. If so, what does that coordination look like?
            ii. Has your coordination with other providers changed at all since the start of the Community Compass program?

III. REPORTING AND OVERSIGHT OF TA

Now we are going to discuss the reporting process you use in tracking and reporting on TA delivery to HUD.

A. Can you describe the process for reporting to HUD for your work with troubled PHAs?
    1. Do you track additional data outside the HUD reporting systems? If so, what data and how do you track it?

       2.   What challenges, if any, have you had with the reporting systems and processes?

B. [*If they administer required TA*] What reporting is mandatory for <u>required</u> TA for troubled PHAs?

       1.   Do you have to track staff that participated? If so, how do you do that?

C. Has your agency/organization tried to assess the outcomes or impact of the recent TA you've provided?

       1.   If so, how did you assess it?

       2.   Any examples that you can share?

IV.   FEEDBACK ON TA ACTIVITIES

The next section relates to receiving feedback from TA customers and providing feedback to HUD staff about TA delivery.

A. Do you solicit feedback from the troubled PHAs receiving the TA?

       1.   If so, what type of feedback do you request?

       2.   Do you revise the TA based on the feedback? Can you provide an example? *(Probe for content vs. process)*

B. Apart from required written reports submitted to HUD, what other ways do you provide feedback to HUD on TA delivery experiences and outcomes? (e.g., emails, HUD trainings, quarterly meetings, conference calls)

       1.   Can you provide an example?

V.   ASSESSMENT AND REFLECTIONS ON THE TA

Finally, we would like to ask you about your perceptions of the TA you provide and the TA process.

A. Do you believe the TA you are providing to troubled PHAs has an impact?

       1.   If so, what type of impact and why?

B. Have you observed any differences in how the troubled PHAs are managed as a result of the TA?

       1.   If so what differences have you observed? Can you give an example?

       2.   If so, what was found to be the short-term outcomes or impacts from the TA?

       3.   Did/will the TA facilitate any longer-term outcomes or impact?

          a.   If so, please describe.

C. Do you see any type or subject matter area of the TA as being the most effective in creating an impact?

D. Have you had any particular challenges with the overall TA provision process you provide for troubled PHAs?

       1.   What challenges have you experienced?

       2.   What evidence of change, or lack thereof, have you seen?

VI.   WRAP UP

A. Is there anything else you would like to add about HUD's TA program and your experience as a HUD TA Provider, or anything else we've discussed today?

B. Do you have any questions for us?

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

PHA TA Customer Interview Protocol

I.   BACKGROUND AND ORGANIZATIONAL INFORMATION

We would like to start with a few background questions about your organization, your roles, and general experience with receiving technical assistance.

     A.   Can you confirm your title?
     B.   Please describe your roles and responsibilities.
     C.   How long have you been with this agency / PHA?
     D.   Today, we plan to discuss your experience with the technical assistance you received because your PHA <u>had</u> a designation as "troubled." Is that correct? We have documented that your organization participated in the following types of TA for your troubled status: [*read list*].
          1.   Did we miss any that you know of?
          2.   Did you personally participate in any of these TA activities? If so, which ones?
     E.   Do you know your current status as a PHA? If so, what is it? (i.e., troubled, in receivership, standard, high performer)
     F.   Now we would like to talking about how you personally got involved in the technical assistance provided to your agency/PHA.
          1.   How did you learn about the TA you participated in?
              i.   Was it required for you to participate? Was it recommended?
              ii.   Who communicated with you about this TA?
                   1.   *Probes: HUD? Your Executive Director?*

II.   IMPETUS FOR RECEIPT OF TA

     A.   [*Executive Director*] *Now we would like to start talking about how you ended up receiving the technical assistance for your troubled status.*
          1.   Did you request the TA or did HUD require participation?
         [*If requested*]
              a.   Why did you request the TA?
              b.   How did you learn about the availability of TA?
                  i.   Was it recommended to you by HUD? By whom? (Field Office or headquarters? Program office?)
                      i.   How was that communicated?
              c.   Where/how did you submit your application/request for TA?
              d.   How long did the process take from the time you submitted the TA request to when you received notice of approval?
              e.   How long did it take from the time you received notice of the TA approval for (name of project) for the TA work to begin?

[I*f required*]

       f.   How did you receive notice of the required TA?
          i.   How soon were you notified after your troubled status was determined?
       g.   Did you perceive this required TA as appropriate to the challenges the PHA was facing at the time? Why or why not?

2. Did you apply for any other technical assistance since receiving your troubled status designation? If so, what was the TA?
   a. Was that TA related to your troubled status?
   b. Did you receive the TA? If not, do you know why not?
      i. Did this lead to any unmet needs?

B. [*All interviewees*] *The Community Compass program was first implemented in 2014.* As a reference, did you or your organization request or participate in any other TA offered by HUD since 2014 beyond the TA you received for your "troubled" status?
   1. What types of TA have you received? For example, on-call TA, direct TA, needs assessment, trainings and self-guided learning online, or tools and products such as manuals or handouts accessible through HUD Exchange. Did you use the Ask-A-Question feature on HUD Exchange?
   2. What was the purpose of this TA?
   3. Did it seem appropriate for the challenges facing the PHA at that time? Why or why not?

III.   TA DELIVERY

Now we would like to delve into your experience of the technical assistance.

A. Can you describe the technical assistance you participated in? [*if multiples, have them walk through each experience one at a time*] *Probe: Did you receive direct TA, on-call TA, needs assessments, trainings, or product creation?*
   1. How was it delivered (i.e. in-person, over the phone, webinar/training modules)?
   2. What was the topic of the TA?
   3. How many people from your office or organization participated in or received TA from this request?
   4. Did any other PHAs participate in the same TA activity in addition to your PHA (e.g., conference call, webinar, in-person training, etc.)?
   5. Who delivered the TA?
      a. How often did you have contact with the TA provider team? (*Probe: over email, over the phone, in person*)
      b. What was their expertise/experience with the topic?
   6. How long did it take from the time you started the TA to the work being completed?
B. Were you given the opportunity to have input on the topic, content or type of the TA? If so, in what ways?
C. What were your perceptions of the TA you received?
   1. Probes: Was it helpful? Was it well coordinated? Did you experience any challenges in communicating with the provider?

D. Did you have any expectations going into this TA experience? What did you expect to receive from the TA?
E. Were your expectations met? Why or why not?
F. What do you think was the most helpful thing you got out of the TA?
G. Did you have any subject matter areas or types of support that you wanted to be covered but did not receive?
H. Were you given the opportunity to request additional assistance? If so, what did that look like?

IV.   TA IMPACT

Now we would like to talk about the impact that these technical assessment activities have had on you and your Public Housing Agency.

A. [*Walk through each TA experience and then overall. If there are too many experiences/TA engagements to discuss them each within the time allotted, ask the respondent to identify the best experience, worst experience and then one in the middle, if time permits.*] Do you believe the TA had an impact?
    1. On your individual knowledge?
    2. On your professional practices?
    3. On your agency's approach to how its run?
    4. On your agency's practices?
B. If so, in what ways?
C. As you know, PHAs are assessed by HUD across a number of categories. [*Walk through score components for the applicable scoring system.*]
    1. PHAS Score Components:
        a. Physical Assessment
        b. Financial Assessment
        c. Management Assessment
        d. Capital Fund Program
    2. SEMAP Score Indicator Categories:
        a. Selection from Waiting List
        b. Rent (Including Utility Allowance)
        c. Income
        d. Housing Quality Standards
        e. Expanding Housing Opportunities/Payment Standards
        f. Lease-up
        g. Family Self-Sufficiency (FSS) Enrollment
D. Do you believe the TA provided to your PHA changed the way your agency operated in any of these areas? If so, in which categories of indicators and in what way?

For Interviewer' Reference Only:
PHA Score Components

Score Component	Possible Points	Description of Component
Public Housing Assessment System	100 points	

Physical Assessment Subsystem (PASS)	40 points	To determine the condition and maintenance of public housing units
Financial Assessment Subsystem (FASS)	25 points	To assess the financial condition of each public housing project
Management Assessment Subsystem (MASS)	25 points	To assess the management capabilities of the PHA as well as the management of individual public housing project
Capital Fund Program (CFP)	10 points	To examine how long it takes a PHA to obligate funds from the Capital Fund

SEMAP Score Components

Score Component	Description of Component
Section Eight Management Assessment Program	
Indicator 1. Selection from Waiting List	Whether there is a written policy for selecting applicants from the waitlist, and whether the agency follows that policy
Indicator 2. Rent Reasonableness	Whether there is a written policy for determining rent reasonableness, and whether the agency follows that policy
Indicator 3. Determination of Adjusted Income	Whether the PHAS verifies and correctly determines adjusted income and utility allowances for each voucher holder for both admission and annual reexamination
Indicator 4. Utility Allowance Schedule	Whether the PHA maintains an up-to-date utility allowance schedule
Indicator 5. HQS Quality Control Inspections	Whether the PHA has verified a sample of recently completed HQS inspections
Indicator 6. HQS Enforcement	Whether the PHA addresses deficiencies found during HQS inspections according to HUD regulations
Indicator 7. Expanding Housing Opportunities	Whether a PHA has adopted and implemented a policy to encourage landlord participation outside of areas of concentrated poverty or minority (only for PHAs in jurisdictions with a metropolitan Fair Market Rent)
Indicator 8. Payment Standards	Whether the PHAs payment standard is between 90 and 110 percent of current FMRs
Indicator 9. Annual Reexaminations	Whether the PHA completes a reexamination of each voucher holder every 12 months
Indicator 10. Correct Tenant Rent Calculations	Whether the PHA correctly calculates tenant rent or share of the rent
Indicator 11. Pre-Contract HQS Inspections	The percentage of newly lease units to pass an HQS inspection
Indicator 12. Annual HQS Standard	Whether the PHA conducts annual HQS inspections
Indicator 13. Lease-Up	Whether the PHA is able to lease up the number allocated number of vouchers
Indicator 14. Family Self-Sufficiency (FSS) Enrollment	Whether the PHA has enrolled families in the FSS program, and the percentage of increase in earned income that result in escrow balances
Deconcentration Bonus Indicator	PHAs that demonstrate a high percentage of voucher holders with children that are located in low-poverty census tracts
	No adverse effect if PHA does not receive points for this indicator

> E. Has your agency/organization assessed the outcomes or impact of the TA in any other way?
> > 1. If so, how did you assess it?
> > 2. How have you seen outcomes change from the TA if at all?

V.   REPORTING AND OVERSIGHT OF TA
This section reviews the reporting and oversight of the technical assistance program.

    A. Was your participation in the TA tracked in any way?
        1. [if required] How did HUD confirm that you have completed the required TA?
    B. Is your agency required to report on the TA activities?
        1. Can you describe the HUD reporting process?
            a. What type of data are you required to report regarding the TA that you receive? How do you submit the data?
            b. How often does your team report on the TA?

VI.   FEEDBACK ON TA ACTIVITIES
Now, we want to talk about your feedback on the TA activities.

    A. Did you have the opportunity to provide feedback about the TA you received?
        1. If so, how did you provide the feedback? (*Prompt: through what mechanism and to whom, HUD or TA provider?*)
    B. Would you like the opportunity to give (more) feedback to HUD about the TA programs?
        1. In what formats would you like to give feedback? (*Probe: through direct check-ins, focus groups, email, an anonymous survey/web Portal*)
            a. To whom would you like to give feedback—directly to the provider/instructor or HUD?
    C. What additional TA do you think would be helpful for your agency to receive?
    D. What recommendations would you make to improve HUD TA processes and systems?
        1. *Probe: Such as improvements to the TA Portal, applications, feedback system, review process, assessment process, or the accessibility and availability of the TA process.*

VII.   WRAP UP
We would like to wrap up with a big picture question.

    A. Is there anything else you would like to add about your PHA's experience as a recipient of HUD TA, or anything we've discussed today?
        1. Do you have any questions for us?
        2. May we follow-up with you if any other questions arise?
            a. [*If yes, exchange contact information for follow-up opportunities*]

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

SNAPS HUD Headquarters Staff Interview Protocol

I.   OFFICIAL ROLE (IN SNAPS AND WITH RESPECT TO HUD TA)

We'd like to start with a few questions about your role in the SNAPS office.

   A.   Can you confirm your title and your office?
   1.   How long you have been in this position?
   2.   What are your primary responsibilities?
   3.   How long have you been involved in technical assistance programs at HUD?
   4.   What other program office(s) do you work with at headquarters?
   B.   What is your role in the SNAPS TA process?
   1.   Has your role changed since you started working with SNAPS TA? In what ways?
   2.   What is your interaction with HUD headquarters staff in other program offices and/or field offices? TA providers? TA customers?
   3.   How many TA engagements are you typically involved with each year?
   i.   Do those engagements typically involve HUD field staff? Providers? Customers?

II.   TA PROCESS OVERVIEW
We want to turn to the TA process chart that you received via email. This chart represents the overview of the HUD TA process as we understand it. We would like to review these steps with you to get your feedback on what we may have missed, how SNAPS may have modified this process to meet their office's specific needs, and to better understand YOUR INVOLVEMENT in the process. [Briefly describe the process reflected in the diagram.]

   A.   What are the goals of the SNAPS TA program?
   1.   Have these goals changed or been refined over time?
   i.   If yes, how (*probe for timing*)?
   2.   Do you anticipate any upcoming changes to these goals?
   B.   Does this diagram accurately reflect the current process for TA provision and recordkeeping?
   1.   Are there steps that we've missed?
   2.   What is the average timeframe between the different steps of the process?
   C.   How does SNAPS implement new TA processes?
   1.   Do you know of any upcoming changes to the SNAPS TA model?
   D.   How did SNAPS develop their on-call TA model?

III.   SELECTION OF TA PROVIDERS
Now we'd like to discuss the process that HUD uses to select TA providers from the NOFA applicants. [Point to box 3 in the diagram]

   A.   Is the SNAPS office involved in setting the TA-provider selection criteria included in NOFAs or in evaluating applications? If so, how? (*Probe: Do staff set criteria or review criteria set by others; do staff have partial or full say in provider selection; etc.)*

B. Who selects the TA providers for SNAPS from the NOFA applicants? How is SNAPS involved in selecting TA providers?

IV. TYPES of TA and RECEIPT/APPROVAL PROCESS OF TA REQUESTS
Next, we'd like to ask about the types of TA that SNAPS manages and how the office receives and reviews TA requests.

A. What are the types of TA that the SNAPS office manages and delivers? [*Refer to types of TA matrix*]
  1. In your experience, how often do TA requests typically result in each type of TA? (*Probe: What are the rough proportions? On-call, direct, tools and products, Ask-A-Question*)
  2. Do cost considerations inform SNAPS TA offerings? If so, how? *Probe: Are different types of SNAPS TA are more expensive than others?*
B. Are there types of TA that SNAPS requires or recommends for its customers or a group of customers?
  1. If so, what are they and how is this communicated to customers?
  2. [*If responsible for assigning TA*] What percentage would you estimate was for TA required by HUD versus TA that was voluntary?
     i. Does your involvement in the TA request and delivery of TA differ by whether the TA is voluntary or required? (*Probe: How does involvement differ? Assignment of TA providers? Type of TA provided? Provision?*)
C. What are the ways in which SNAPS customers (e.g., CoCs) request TA? [*Refer to the TA Process Diagram*] (*Probe: Through the TA Portal? From direct conversations with HUD headquarters or field staff?*)
  1. Why are there different ways the TA is requested? (*Probe: Because of the type of TA being requested? the type of customer? the program office? the type of need or content area?*)
D. Are all records of TA requests kept in the TA Portal, or are there other management systems/mechanisms in use to track requests?
  1. (if other systems) What are the other systems?
  2. Who enters requests in the TA Portal (and other systems)?
E. Do you or does your office play a role in deciding the appropriate TA to require or to offer in response to a TA request? Please describe.
  1. If so, what criteria does SNAPS use to evaluate requests for TA?
  2. What factors are considered in the decision-making process? (*Probe: TA content and delivery methods? Past customer requests and outcomes? Availability of funds? Policy priorities? Others?*)
     i. What factors would cause a request to be rejected?
     ii. What factors determine the type of TA offered?
F. How does the on-call TA process work?
  1. How is the determination made to offer on-call TA (compared to other types)?
  2. How is the determination made to move from an on-call to direct TA engagement?
G. How are providers selected to provide the different types of TA?

V. TA DELIVERY AND TRACKING/OVERSIGHT

Now we'd like to ask you about the process for tracking TA engagement. [Point to boxes 6 and 7]

A. Is there a centralized process for TA delivery? (e.g., planning and decision-making are conducted at the SNAPS office, and then disseminated to field offices, providers, and customers)
   1. If so, are there any differences between different types of TA (e.g., on-call, direct TA, Ask-A-Question?
B. Does SNAPS have specific standards for how quickly a TA request should be assigned and the TA should be started?
   1. For on-call TA, is there a specific timeframe in which the TA needs to be recommended to move from on-call to direct TA?
   2. For Ask-A-Question, does SNAPS have a specific requirement for how quickly questions should be assigned? Should be addressed?
C. Does SNAPS generally provide any specific oversight or engagement to a TA project once it is assigned to a provider?
   1. If so, who is involved and what is their role?
D. Does SNAPS have a standard tracking and oversight process for TA?
   1. Does the standard process change depend on the type of TA?
E. Do you regularly track activities in HUD's TA Portal? In DRGR?
   1. If so, how do you track the TA activities from the data? (i.e. monthly status reports? Reviewing narratives from TA providers or customers?)
F. Does SNAPS have a process for obtaining feedback from its customers and providers about specific TA engagements? If so, what is the process and does that process vary by TA type?
   1. Is the feedback provided in response to a request from HUD or is it customer initiated?
   2. What are the mechanisms for providing feedback (e.g., through the TA Portal, directly via email, etc.)?
   3. Do many customers provide feedback?
   4. Can you give an example of a time you received feedback and it informed changes in the TA process?

VI. COORDINATION AND COMMUNICATION
A. Does the SNAPS office coordinate with other program offices or field offices to deliver TA? To standardize the TA process or offerings?
   1. If so, what does that coordination look like?
B. Once selected, do SNAPS TA providers coordinate across TA offerings? With other providers? Across SNAP programs?
   1. If so, what does that coordination look like?
      i. Do they coordinate with other providers to design the standardized TA?
      ii. Do they coordinate across program offices to provide similar TA to customers?
C. Where do you think coordination/additional coordination could improve your work?
   1. What do you think SNAPS headquarters or field staff, or TA providers could do to improve coordination across TA providers, or across program offices?

    D. How does SNAPS headquarters communicate with CPD field staff, TA providers, and TA customers? (*Probe: over email, over the phone, in person*)
        1. Are there any changes you would like to see in how your organization communicates with CPD field offices, TA providers, and customers?

VII.   WRAP UP

We'll wrap up with some big-picture questions.

    A. [*If tenure with HUD TA is prior to 2014*] What are the biggest changes overall since the TA process was reorganized under Community Compass? (*Probe: What effect has the change to Community Compass (from "program-specific" TA to "cross-program" TA) had on TA processes? TA provider selection? Evaluating TA requests?*)
    B. Are there steps in the process that have improved/become more efficient or effective since the reorganization under Community Compass? Are there aspects that have become more difficult/less effective?
        1. Do you think the transition has increased internal coordination across TA programs?
            i. Can you provide a couple of examples of increased coordination?
            ii. Do you think this has made you more efficient?
        2. Do you think the transition has led to improved coordination and communication across TA providers? Why or why not?
        3. Do you think Community Compass has led to the use of standardized materials across TA providers?
        4. What do you think the TA providers or HUD staff could do to reduce the duplication or lack of standardization?
    C. What, if any, changes would you make to the current TA process if you could?
        1. Are there specific changes to the process or data systems that could improve HUD's TA for customers, providers, or HUD staff/program offices?
    D. Is there anything else you think we should know about the TA request and delivery process that we have not asked about yet?
    E. May we follow-up with you if any other questions arise?
        1. [*If yes, exchange contact information for follow-up opportunities*]

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

SNAPS HUD Field Staff Interview Protocol

I. OFFICIAL ROLE (IN THE FIELD OFFICE, AND WITH RESPECT TO HUD TA)

We'd like to start with a few questions about your role.

A. Can you confirm your title and your office?
    1. How long you have been in this position?
    2. What are your primary responsibilities?
    3. How long have you been involved in technical assistance programs at HUD?
    4. What other program office(s) do you work with at headquarters?
B. What is your role in the SNAPS TA process?
    1. Has your role changed since you started working with SNAPS TA? In what ways?
    2. What is your interaction with HUD headquarters staff in other program offices and/or field offices? TA providers? TA customers?
    3. How many TA engagements are you typically involved with each year?
        i. Do those engagements typically involve HUD field staff? Providers? Customers?

II. TA PROCESS OVERVIEW

We want to turn to the TA process chart that you received via email. This chart represents the overview of the HUD TA process as we understand it. We would like to review these steps with you to get your feedback on what we may have missed, how SNAPS may have modified this process to meet their office's specific needs, and better understand YOUR INVOLVEMENT in the process. [Briefly describe the process reflected in the diagram.]

A. In your experience, what are the goals of the SNAPS TA program?
    1. Have these goals been changed/been refined over time, and how?
    2. Do you anticipate any upcoming changes to these goals?
B. Does this diagram accurately reflect the current process for TA provision and recordkeeping?
    1. How involved is the field office throughout the TA process?
    2. Are there other major steps that we've missed?
C. What is the average timeframe between the different steps of the process? How does SNAPS implement new TA processes?
    1. Do you know of any upcoming changes to the SNAPS TA model?
D. How did SNAPS develop their on-call TA model?

III. RECEIPT/APPROVAL PROCESS OF TA REQUESTS

Next, we'd like to ask about how HUD receives and reviews TA requests. [Point to boxes 4 and 5 in the diagram]

A. How is your HUD field office/local office involved in TA requests?

       1. Do you work solely with SNAPS? If not, does your involvement differ by program office?

B. What are the types of SNAPS TA that your field office manages and delivers? [*Refer to Types of TA table*]

       1. In your experience, how often do TA requests typically result in each type of TA? (*Probe: What are the rough proportions? On-call, direct, tools and products, Ask-A-Question*)

       2. Do cost considerations inform SNAPS TA offerings? If so, how? (*Probe: Are different types of SNAPS TA are more expensive than others?*)

C. Are there types of TA that SNAPS requires or recommends for its customers or a group of customers (e.g., CoCs, ESG jurisdictions)?

       1. If so, what are they and how is this communicated to customers?

       2. [If responsible for assigning TA] What percentage would you estimate was for TA required by HUD versus TA that was voluntary?

          i. Does your involvement in the TA request and delivery of TA differ by whether the TA is voluntary or required? (*Probe: How does involvement differ? Assignment of TA providers? Type of TA provided? Provision?*)

D. What are the ways in which SNAPS customers request TA? [*Refer to the TA Process Diagram*] (*Probe: Through the TA Portal? From direct conversations with HUD headquarters or field staff?*)

       1. Why are there different ways the TA is requested? (*Probe: Because of the type of TA being requested? the type of customer? the program office? the type of need or content area?*)

E. Are all records of TA requests kept in the TA Portal, or are there other management systems/mechanisms in use?

       1. Who enters these requests?

       2. Are you able to view TA requests/provide input in the Portal or other systems?

F. Does your office play a role in the decision making on the appropriate TA to offer?

       1. If so, please describe.

       2. [*If office plays a role in decisions*] What criteria does SNAPS use to evaluate requests for TA?

          i. What factors are considered in the decision-making process? (*Probe: TA content and delivery methods? Past customer requests and outcomes? Availability of funds? Policy priorities? Others?*)

             1. What factors would cause it to be rejected?

                a. On average, how many requests would you say are rejected each year?

             2. What factors determine the type of TA offered?

G. [*If office plays a role in decisions*] How are providers selected to provide the different TA projects?

IV.   TA DELIVERY AND TRACKING/OVERSIGHT

Now we'd like to ask you about the process for tracking TA engagement. [Point to boxes 6 and 7]

A. Is there a centralized process (*e.g., planning and decision-making are conducted at the SNAPS office, and then disseminated to field offices, providers, and customers*) governing all TA delivery, or are there any differences between different types of TA (e.g., on-call, direct TA, Ask-A-Question)?
B. What are the most frequently used types of SNAPS TA in your office or region? (e.g., *on-call TA, direct TA, needs assessment, trainings and self-guided learnings, or tools and products*) Which are less frequently used?
   1. Why do you think some types are used more than others?
C. Does your field office have a standard tracking and oversight process for TA?
   1. If so, does the standard process change depend on the type of TA?
D. Does your office track or provide more active oversight of TA projects once they are assigned to a provider?
   1. If so, what is the oversight process?
      i. Who is involved and what is their role?
E. Does your field office have a process for obtaining feedback from its customers and providers about specific TA engagements? If so, what is the process and does that process vary by TA type?
   1. Is the feedback provided in response to a request from HUD field staff or is it customer initiated?
   2. What are the mechanisms for providing feedback (e.g., through the TA Portal, directly via email, etc.)?
   3. Do many customers provide feedback?

VIII. COORDINATION AND COMMUNICATION

A. Does your field office coordinate with other field offices to deliver TA? To standardize the TA process or offerings?
   1. If so, what does that coordination look like?
   2. If so, do SNAPS TA providers coordinate across TA offerings in your region? With other providers? Across SNAP programs?
      i. If so, what does that coordination look like?
         1. Do they coordinate with other providers to design the standardized TA?
         2. Do they coordinate across program offices to provide similar TA to customers?
B. Where do you think coordination/additional coordination could improve your work?
   1. What do you think HUD headquarters or field staff, or TA providers could do to improve coordination across TA providers, or across program offices?
C. How does your organization communicate with SNAPS headquarters, TA providers, and customers? (*Probe: over email, over the phone, in person*)
   1. Are there any changes you would like to see in how your organization communicates with SNAPS headquarters, TA providers, and customers?
D. Does your field office have an opportunity to provide feedback to SNAPS headquarters staff about the TA process?
   1. If so, how often do you provide feedback?
   2. If not, would you like the opportunity to give feedback to HUD about the TA process?
E. Are you and/or your field office involved in regionally coordinated TA? If so, how?

V.   WRAP UP

We'll wrap up with some big-picture questions.

A.   [*If tenure with HUD TA is prior to 2014*] What are the biggest changes overall since the TA process was reorganized under Community Compass? (*Probe: What effect has the change to Community Compass (from "program-specific" TA to "cross-program" TA) had on TA processes? TA provider selection? Evaluating TA requests? In the role of regional or field offices?*)
B.   Are there steps in the process that have improved/become more efficient or effective since the reorganization under Community Compass? Are there aspects that have become more difficult/less effective?
    1.   Do you think the transition has changed the level of internal coordination across TA programs? If yes, has it increased or decreased coordination?
            i.   Can you provide a couple of examples?
    2.   Do you think the transition has led to improved coordination and communication across TA providers? Why or why not?
    3.   Do you think Community Compass has led to the use of standardized materials across TA providers?
    4.   What do you think the TA providers or HUD staff could do to reduce the duplication or lack of standardization?
C.   What, if any, improvements would you recommend to the current TA process?
    1.   Are there specific changes to the process or data systems that could improve HUD's TA for customers, providers, or HUD staff/program offices?
D.   Is there anything else you think we should know about the TA request and delivery process or the transition to Community Compass that we have not asked about yet?
E.   May we follow-up with you if any other questions arise?
    1.   [*If yes, exchange contact information for follow-up opportunities*]

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

SNAPS TA Provider Interview Protocol

I.   BACKGROUND AND ORGANIZATIONAL INFORMATION

We will start with a few background questions about your organization/company, your roles, and general experience with providing technical assistance.

A.   Can you confirm your title?
1.   Please describe your roles and responsibilities.
2.   How does this relate to the TA your organization/company provides?
3.   How long have you been involved in technical assistance programs at HUD?
a.   For homelessness programs?
B.   Can you describe the type of TA and the content area that you work on as a TA provider?
1.   What is provided particularly for SNAPS?
C.   Overall, how many people in your organization/company are involved in providing SNAPS TA?
1.   Do you use subcontractors to deliver TA? If so, what roles do they generally play?
D.   Who do you report to at SNAPS headquarters? CPD field staff?
1.   How often do you communicate with your HUD program officer? How?
2.   How often do you meet with them?
3.   Has your HUD program officer or other HUD staff observed your TA activities in the field?

II.   THE TA PROCESS

A.   TA AWARDS
We are aware that you have been awarded a contract/cooperative agreement to provide TA for SNAPS programs.

1.   What HUD TA contracts and/or cooperative agreements does your organization currently manage? How many of these contracts/cooperative agreements are with the SNAPS office?
a.   Can you confirm the year awarded, the total amount, and the program office for each current SNAPS contract/agreement?
b.   Do you typically apply to provide TA through the same HUD programs over time? Why, or why not?
2.   Looking at the TA Matrix we sent you, can you list the types of SNAPS TA you provide?
a.   (*Refer to our TA Matrix emailed ahead of the interview; for example, direct TA, on-call TA, needs assessments, trainings, or product creation*).

      b. Do you provide any TA that was required or recommended by SNAPS for specific customers or a group of customers?
- i. *[If they administer required TA]* Are there any key differences in TA delivered to fulfill voluntary requests versus mandatory TA?
- ii. If so, what?

B. TA REQUESTS
1. How many staff within your organization support this type of TA (*insert TA type here*)?
   a. What is your role in providing SNAPS TA?
   b. *[If multiple staff]* Can you briefly describe their roles and responsibilities?
2. Describe your organization's process for receiving TA requests from HUD.
   a. Is there a primary point of contact in SNAPS who sends the TA requests or do the requests come from multiple avenues depending on the type of TA?
      - i. (if the latter) What are these avenues?
   b. How do you get the requests? Through the TA Portal or other mechanism?
      - iii. Which types of TA requests come through the TA Portal?
      - iv. Do you see any trends between the types of requests, either by topic or by TA type, that come through the TA Portal and requests that come through other mechanisms?
   c. What do you do once a request is received?
   d. How many TA requests would you say you receive on average from the SNAPS office each year?

C. DELIVERY OF TA
1. How long does it generally take (on average) from receipt of the request to the start of TA delivery? What happens during this time?
2. With whom are you typically working to scope out the requirements of the TA work and develop the work plan? (*Probe: HUD headquarters? Field staff?*)
   a. What does that process look like?
   b. How do you determine what type of TA and what subject matter topic each TA recipient requires?
3. *[If organization provided TA prior to 2014]* Are you aware of any changes to the way your organization administered TA based on the change to the Community Compass program?
4. Of the TA that you deliver to SNAPS TA customers, what types are standardized in some way versus uniquely customized to specific TA requests (e.g., topic being addressed, type of delivery)?
   a. *[If both]* How do you determine if you should apply standardized or customized TA?
   b. If so, what does that coordination look like?
5. What challenges have you or your team experienced during the TA delivery process?

III.   REPORTING AND OVERSIGHT OF TA

A. Can you briefly describe the process for reporting to SNAPS? (P*robe: what are you required to report on and how? (e.g., data submission, standardized performance tracking measures, a qualitative template, an informal check in*).
   1. How often are you required to submit reports?
   2. What data systems do you use for your reporting, if any?
B. How often does your SNAPS program officer review your agency's activities during the provision of TA?
   1. Do you interact primarily with SNAPS headquarters staff? Or field staff?
C. Do you track any outcomes or results from the SNAPS TA you have delivered? (*Probe: number of engagements*)
   1. If so, what outcomes do you track?
   2. Do you track outcomes for some types of TA but not for others?
   3. Any examples that you can share?

IV. FEEDBACK ON TA ACTIVITIES

The next questions concern receiving feedback from TA customers and providing feedback to HUD staff about TA delivery.

A. Do you solicit feedback from your SNAPS TA customers?
   1. If so, what type of feedback do you request? [*Probe: the overall TA process, the instructors' approach, the course itself, the product, perspectives of TA value etc.*]
   2. What is your process for soliciting feedback? Can you provide an example?
   3. If so, have you ever made changes to the SNAPS TA you provide based on feedback? *(Probe: revised materials, presentation approach, workshops, other?)*
      a. If so, can you provide an example?
B. Has your agency/organization tried to assess the outcomes or impact of the recent SNAPS TA you've provided?
   1. If so, how did you assess it?
   2. If so, what outcomes or impact did you find?
      a. Were these short-term or longer-term outcomes/effects?
C. Do you provide feedback to SNAPS headquarters or field staff about your TA activities/projects outside of required reporting?
   1. If so, how often do you provide feedback?
   2. If not, would you like the opportunity to give feedback to HUD about TA programs? Processes?

V. COORDINATION AND COMMUNICATION
A. Once selected, do you or your organization coordinate with other TA providers as part of your SNAPS TA engagements?
   1. If so, who do you coordinate with? (*Probe: Staff in the SNAPS office at the headquarters office? HUD field offices? Other TA providers?*)
   2. If so, what does that coordination look like?
      i. Do you coordinate with other providers to design the standardized TA?
      ii. Do you coordinate across program offices to provide similar TA to customers?
B. Where do you think coordination/additional coordination could improve your work?

1. What do you think HUD staff or TA providers could do to improve coordination across TA providers, or across program offices?
C. How does your organization communicate with SNAPS headquarters and field staff? (*Probe: over email, over the phone, in person*)
   1. Are there any changes you would like to see in how your organization works with HUD headquarters or field staff, or other TA providers?
D. Does your organization have an opportunity to provide feedback to SNAPS headquarters or field staff about the TA process?
   1. If so, how often do you provide feedback?
   2. If not, would you like the opportunity to give feedback to HUD about the TA process?

VI.   WRAP UP
   A. [*If provided SNAPS TA prior to 2014*] What are the biggest changes overall since the TA process was reorganized under Community Compass? *Probe: What effect has the change to Community Compass (from "program-specific" TA to "cross-program" TA) had on TA processes? TA provider selection? Evaluating TA requests?*
   B. Are there any challenges that you or your team experience working with SNAPS TA (from requests, to project development, to delivery, to close-out)?
      1. Any changes you would make to the SNAPS process?
   C. Is there anything else you would like to add about the SNAPS TA program and your experience as a SNAPS TA Provider, or anything we've discussed today?
   D. How could any duplication or lack of standardization in the TA process be reduced? By HUD staff? TA providers?
   E. Do you have any questions for us?
   F. May we follow-up with you if any other questions arise?
      1. [*If yes, exchange contact information for follow-up opportunities*]

Thank you for taking this time to meet with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.

SNAPS TA Customer Interview Protocol

I.   BACKGROUND AND ORGANIZATIONAL INFORMATION

We would like to start with a few background questions about your organization, your roles, and general experience with receiving technical assistance.

A.   Can you confirm your title and your agency / organization?
   1.   How long you have been in this position? How long have you been with the agency?
   2.   Please describe your primary role and responsibilities.
   3.   How long have you been involved with HUD's technical assistance programs?
   4.   What other program office(s) do you work with at headquarters?
B.   Which SNAPS programs does your agency/organization currently administer?
   1.   Have you applied for other HUD programs? If so, which programs?
C.   [*If TA list is available from the TA portal*] You should have received a list of the TA pulled from the TA portal of the TA you/your organization received for your SNAPS programs in the past four years. Is this list accurate? (*Refer to our TA Matrix and list of customer TA emailed ahead of the interview*.)
   1.   Can you confirm when were each of these TA projects delivered?
D.   [*If TA list is not available from the TA portal*] In the past four years, what types of TA have you received for your SNAPS programs? (*Refer to our TA Matrix emailed ahead of the interview; for example, direct TA, on-call TA, needs assessments, trainings, or product creation*).
   1.   When were each of these TA projects delivered?

II.   TA REQUESTS AND DELIVERY

A.   SNAPS TA REQUESTS AND DELIVERY [GENERAL]
   For the next set of questions, please focus on your agency's typical experiences with all TA your agency has received in the last four years.

   1.   How did you/your agency/your organization learn about the availability of SNAPS TA?
   2.   What share of the TA was required by SNAPS versus a voluntary application by your agency/organization?
      a.   If voluntary, what motivated you to request TA?
      b.   Has SNAPS headquarter or field staff recommended TA to you/your agency/your organization?
      c.   If required, what kind of TA was required and what were the reasons that it was required by SNAPS?
   3.   What problems or challenges were you trying to solve with TA?
   4.   Describe the process for requesting TA from SNAPS.

        a.   Did HUD require you/your organization to apply/complete an application for each TA requested?

        b.   How was your experience with the application process, in general? (*Probe: time taken, effort burden, clarity of instructions/steps?*)

        c.   Where did you submit your application/request for TA? Was it the same for each TA request?

           i.   Are they sent to SNAPS/specific person in the program office?

        d.   On average, how long did it take from the time you submitted a request to when you received notice of an approval or denial for a TA request?

        e.   [*If applicable*] does the request process differ from TA request process of other HUD offices you have worked with?

5.   Were you given the opportunity to have input on the topic, content or type of the TA? If so, in what ways?

6.   Have you applied for other TA and had your request denied?

        a.   If so, what was the request?

7.   If so, what do you think the consequences of the denial been for your agency?

For the next set of questions, please focus on your agency's typical experiences with the specific TA that your agency has received in the last four years.

B.   ON-CALL AND DIRECT TA [IF APPLICABLE]

1.   Typically, how is your organization notified that you have received on-call TA from SNAPS?

        a.   How long does it usually take from the time you received notice of the TA approval for on-call TA for the work to begin?

        b.   When you are awarded on-call TA, how was the on-call model (i.*e., 16 initial hours for TA and moving to a direct engagement if necessary*) explained to you?

           i.   Do you feel that this method meets your needs for TA?

2.   How long does it typically take from the time you started the TA work to the completion of the project?

        a.   About how often does the on-call TA lead to a direct TA engagement? Do you typically request direct TA or does the provider or HUD recommend direct TA?

           i.   If so, how is that determination made?

           ii.   If so, how is the information shared with you?

3.   Please briefly describe the types of direct TA that you and/or others in your organization receive in general.

        a.   What were the topic(s) of the TA?

        b.   How many people from your office or organization have participated in or received TA from this request?

        c.   Who typically delivers the TA?

           i.   What are their credentials/expertise on the topic?

           ii.   Do they have previous experience delivering TA?

       iii.   How do they deliver the TA? (e.g., in-person workshop or convening, on call coordination/meetings, onsite coordination/meetings, etc.?)

       iv.   How often do you have contact with the TA provider team? Does that differ by TA provider?

       v.   How do you interact with the team? (*Probe: over email, over the phone, in person*)

           i.   Does that differ by TA provider?

4. [*If they have received TA from multiple program offices*] How does the process for SNAPS TA compare to TA provided through other HUD programs?

C.   TRAININGS AND SELF-GUIDED LEARNING [IF APPLICABLE]

1. Does your agency participate in training and/or self-guided learning?
2. How does you/your agency / your organization learn about the availability of the SNAPS training or self-guided learning opportunity?
3. Please briefly describe the training/self-guided learning opportunity people from your organization have participated in.
    a.   Who provided the training (if not self-guided)?
    b.   Did other agencies participate in the training sessions?
4. What motivated you to participate?
5. Are there any topics you would like to see covered in future trainings or self-guided learning that are not available now?

D.   TOOLS AND PRODUCTS [IF APPLICABLE]

1. Please briefly describe the TA tools/products that you or your organization have used and how you used them. (*e.g., manuals or handouts accessible through HUD Exchange*)
2. How do you/your agency / your organization learn about tools/products?
3. Did you find the tool/product to be helpful in meeting your goals?
4. Are there any tools or products you would like to see that are not available now?

E.   ASK-A-QUESTION FEATURE [IF APPLICABLE]

1. have you use the SNAPS Ask-A-Question feature? If so, what for?
    a.   How many times have you used the Ask-A-Question feature?
2. Were you able to get a response to your question/answer?
    a.   Who responded to your query? SNAPS staff? TA provider?
    b.   How long did it take to receive a response to your question?
    c.   Are there any changes you would like to see to the Ask-A-Question feature?

F.   SNAPS TA DELIVERY [GENERAL]

For the next set of questions, please focus on your agency's typical experiences with all TA your agency has received in the last four years.

1. Was the TA you received helpful?
2. Was it well coordinated?
3. Did you experience any challenges in communicating with the TA provider?
4. Did you have any expectations going into the TA experiences? What did you or your organization expect to receive from the TA?
   a. If so, were those expectations met? Why or why not?
5. What do you think was the most helpful thing you got out of the TA?
6. Did you have any subject matter areas or support that you wanted to be covered but did not receive?
7. Were you given the opportunity to request additional assistance? If so, what did that look like?

III. TA IMPACT

A. Generally, do you believe the TA that you have received since 2014 had an impact on your agencies ability to administer the SNAPS program and serve SNAPS clients?
   1. On your individual knowledge?
   2. On your professional practices?
   3. On your agency's approach to how its run?
   4. On your agency's practices?
B. If so, in what ways?
   1. Can you think of specific instances that were particularly impactful?
C. Do you believe the TA provided to your organization changed the way your agency operated in any of these areas? If so, which measure and in what way?
D. Has your agency/organization assessed the outcomes or impact of the TA in any other way?
   1. If so, how did you assess it?
   2. If so, what was found to be the short-term outcomes or impacts from the TA? (e.g., for you individually, for colleagues/staff, for program/project, for agency/organization, for the community?)
   3. If not, what do you think was the short-term outcome or impact from the TA? (e.g., for you individually, for colleagues/staff, for program/project, for agency/organization, for the community?)
   4. Did/will the TA facilitate any longer-term outcomes or impact?
      a. If so, please describe.

IV. FEEDBACK ON TA ACTIVITIES

A. Do you typically have the opportunity before or after the TA to provide feedback about the TA your agency has received?
   1. If so, how do you provide the feedback? (*Probe: through what mechanism and to whom*)
   2. Have you see any response or changes made based on this feedback?
B. Would you like the opportunity to give (more) feedback to SNAPS about the TA programs?
   1. What formats would you prefer for giving feedback? (*Probe: through direct check-ins, focus groups, email, an anonymous survey/web Portal*)

To whom would you like to give feedback—directly to the provider/instructor or HUD?

V.   WRAP UP

A. What recommendations would you make to improve SNAPS TA processes and systems? (*Probe: Such as improvements to the TA Portal, applications, feedback system, review process, assessment process, or the accessibility and availability of the TA process.*)
B. Is there anything else you would like to add about being a SNAPS TA customer, or anything we've discussed today?
1. Do you have any questions for us?
2. May we follow-up with you if any other questions arise?
a. [*If yes, exchange contact information for follow-up opportunities*]

Thank you for taking this time to meet/talk with us. If there's anything you think of later that you'd like to share, please don't hesitate to e-mail or call us.