

Workforce Dirigo Site Interview Project - Lessons Learned

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I. What we did

University of Southern Maine's Pathways to Higher Education staff were engaged to conduct onsite interviews with home care agencies who self-selected into the grant project study sample. Three Pathways staff (Steve McFarland, Director; Gail Benvenuta, Site Coordinator; and Sherrie Winton, Project Specialist) worked directly with Muskie School/Institute for Health Policy project staff to design and carry out in-person in-depth data gathering. Over a course of 4-plus months, the two primary interviewers, with support from the Director, traveled statewide to sit down with 75 individuals, including agency owners, administrators, and front-line workers, and record their thoughts about recruitment and retention issues in home-based health care.

The information gathered will be used in two ways: (1) as qualitative data to compliment extensive quantitative data that will be reported out after analysis; and (2) to inform development of the grant's "Employer of Choice" program both as a broad-based picture of recruitment and retention considerations and for customizing site-based activities.

II. How we went about it

A. Development process

- Determining goals for qualitative on-site interviews to compliment the quantitative phone-based research being done, with an eye to potential future engagement in the "Employer of Choice" section of the project.
- Several team revisions of questionnaires led to the creation of a 1-1/2 to 2-hour interview session for employers/administrators and a 45-minute session for direct care workers employed by the agency.
- Effectively formatting the interview sessions, gathering input from both employers and workers
- Managing the work on a statewide basis

B. Making connections / conducting interviews

1. Entry point for onsite interviews: Muskie project staff determined the potential agency sample, made first and second (typically) contacts with employers/administrators for project buy-in. Contact information for arranging site interviews was then passed along to the Site Coordinator for this portion of the work.

2. Interview team divided up the sample set, mostly based on location to accommodate travel and time needs.

3. Interview team members began the process of making contacts with employers (either agency owner or an owner-designated administrator).
4. Phone discussion with employers led to scheduling at least the employer interview. By their choice, some employers assisted in recruiting and scheduling 1-3 employees to be interviewed on the same day. Other employers, after making the initial contact with the workers to encourage participation, gave the interviewer worker names and phone numbers and the interviewers took responsibility for setting up the worker interviews.
Employer interviews took place at the agency office - sometimes located in the owner's home, in the case of several small agencies. Worker interviews were held either at the agency or at a place designated by the worker (for example, Dunkin Donuts or their home).
Missed appointments or cancellations or rescheduling of workers occurred even when employers arranged for employees to come to the office to be interviewed. Worker shortages, challenging weather conditions and illnesses were typically given as reasons in this case.
5. Workers were given a \$20 gift card for either WalMart or Hannaford Market (their choice). Most workers interviewed received their gift card at the time of the interview, but some had to wait for a mailed card because more interviews were held than gift cards initially ordered.
6. Completed interviews were given to the Lead Researcher for analysis and inclusion in project reporting. Copies retained by Pathways are being used to further Employer of Choice program development. Agencies who participate in Employer of Choice will have the benefit of "needs assessment" work already well underway by virtue of these interviews having been completed.

III. Challenges

* *Encountered:*

Logistics

✓ Timing

- Drawn-out development and recruitment process - began process discussion in August; no interviews begun until the end of November
- Holidays – impacted availability of interviewees
- Weather – a high number of interviews had to be rescheduled; a couple of worker interviews simply did not get rescheduled.

✓ The nature of the "industry" – time is at a premium

- Busy, busy, busy employers
- Frequently, unexpected crises impacted employer availability (staffing issues, illnesses)
- Range of worker responsiveness
 - Unable to contact, even though recommended by employer
 - Forgotten appointments
 - Commonly-identified issues for workers: family/child emergency, illness, transportation crisis, unexpected change in work schedule
- Multiple contacts were needed to schedule and complete interviews. Some interviewees required as many as 10 calls to get scheduled, including "reminder" calls the evening before the interview.
- Call logs were not kept, but team members estimate that 8-15 phone calls per agency were needed to get all interviews scheduled and completed.

* *How overcome:*

- ✓ Patience
- ✓ Persistence
- ✓ Flexibility and willingness to accommodate
 - Willingness to reschedule multiple times
 - Willingness to meet at hours needed to accommodate employers' and employees' schedules
 - Willingness to travel in poor weather
 - Skillful communication
 - In a couple of cases, we just had to let go and give up on that interview (workers), or let go of the agency as a study participant
- ✓ The offer of a gift card helped in many cases

* *Encountered:*Participation

- ✓ Some employers questioned the value of participating in the study; it was/is tough for them to be motivated to take this chunk out of their busy and/or chaotic day when they're on the fence about really getting something out of it.
- ✓ Owner (or first contact) identified another individual to be interviewed, but/and that person was challenging to reach, or hadn't really been very well informed about what was up. The less-informed ones were harder to reach and engage.

* *How overcome:*

By our listening to their concerns, engaging in discussion to inform and clarify, and making assurances that time requirements would be limited and honored, interviewees who experienced trepidation gained comfort with the process. By the completion of the individual interview, people were happy with having participated, enjoyed the process, and expressed interest in hearing about results.

For most, a combination of going through the in-person interview *plus* working directly with the grant researchers seems to have allayed the initial concern. And, a couple of employers dropped out of the study prior to interviewing – “too much going on.” One employer with a long history of State-level work expressed skepticism about the systems-change worth of “yet another study,” and chose to drop out after interviewing.

* *Encountered:*Response to interview questions

- ✓ Employer did not want to be viewed as “negative” or “not effective” or having “negative challenges,” and so was reluctant to speak about challenges or situations that were problematic. (“We have no problems with recruitment or retention.”)

* *How overcome:*

Prompting and ongoing relationship-building generally allowed for authentic exchange, although with a couple of administrators interviewed, a longer-term relationship might develop more trust and ease with the questions.

IV. Outcomes

29 Agencies participating (originally 30; one dropped out)

- 3-75+ employees
- 30 employers interviewed
- 42 workers interviewed
- 6-8 employer-recommended workers not able to be scheduled, or not scheduled until very late in the process

What's worked – positive connections and outreach:

- **DEVELOPING RELATIONSHIPS** with the employers is particularly important (respectful listening, non-judgmental attitude, demonstrating a desire to understand versus critiquing or evaluating). Many understandably are proud of their agency and are not always so ready to dive into the negative barriers & challenges that they face with recruitment & retention.
- **IN-PERSON CONNECTIONS.** The face-to-face sessions have had a positive impact – at least in the moment. Several employers expressed satisfaction and a more positive sense of participating in the study by virtue of having sat down with us at length, and felt the extended session was well worth the time needed (up to 2 hours). Future contact will be easier.
- **THOUGHT-PROVOKING QUESTIONS.** When the interviews have been completed, both administrators and workers have been highly positive about the sessions. The questions have been very well received. Several workers have said they're very much interested in reading the summary report when it's available.
- **HUMOR AND PROFESSIONAL REGARD.** Workers (especially) enjoyed being told they are now "Human Subjects in a Research Study" – and the formal process has, for some, "lifted them up" in terms of the importance of their "voice." Many have not been asked some of the questions before, nor have they had opportunity to speak to some of the issues raised.
- **The GIFT CERTIFICATES matter.** They are appreciated. Employers, too, appreciate that they are given to their employees.
- **A SAFE, NEUTRAL, COMFORTABLE place** for people to share their thoughts and concerns is appreciated, by both employers and workers.
- **The TEAM APPROACH** being used (contact with three "layers" of staff) will ultimately be favorable, as at least some employers recognize the level of engagement on our part to work with them. *It is, though, important to find a balance in terms of amount/time of contact.*

V. Considerations for Employer of Choice engagement:

Indications for ongoing work

- Identify an **INTERNAL CHAMPION** (within the agency) who believes in the importance of Employer of Choice. This employer has some philosophical alignment with the goals of the study; the organization has at least some practices that mesh with project goals (at a minimum, a desire and willingness to participate).

- Those who have the ability to objectively assess the climate of the organization and recognize the strengths but also see that some changes need to be made ... are going to be motivated to stay with the study - those who have some motivation to learn and improve current practices, systems, etc.
- Actual ACTIVITIES: REAL-TIME AND TIMELY FOLLOW-UP to the in-person interviews.
 - EARLY SUCCESSFUL ACCOMPLISHMENT: Project staff must be able to respond to a specific need or two in a relatively short time frame– supports desire and trust).
- PERSONAL CONTACT as appropriate to ascertain that those participating are still doing fine with providing research data. Will be useful to know from each participant employer how much contact and of what nature (email, phone, visit) suits them around project needs and activities – CUSTOMIZATION of the contact is respectful and honors the relationship.
- PROGRAM DEVELOPMENT EXPERTISE available through our contact may engage employers who recognize they have room to improve and/or recognize the opportunity the grant funds can provide.
 - ✓ Appraisal of organizational culture through staff’s knowledge of interview content, along with any further needs assessment activity, provides added value.
 - ✓ Participants who already run an effective organization may be less inclined to want to participate in Employer of Choice activities. These, though, could provide some “role model” function within the overall project – an opportunity that the grant could offer.
- Appropriate engagement about POST-PROJECT SUSTAINABLE ACTIVITIES OR SYSTEMS. If employers understand and get added value, they will be more likely to continue long-term “Employer of Choice” activities. A mechanism for at least short-term follow-up with participating agencies post-grant might be of use. [Pathways could provide this.]