Community Services Administration

Region IX
Box 36008 • 450 Golden Gate Ave.
San Francisco, California 94102

Date: OCT 15 1979
Reply to Attn. of: 9/PBE&SP

Subject: CAA Evaluations

To: CAAs, CAP Director Associations and SEOOs

We funded the Institute for Local Self Government to perform three more evaluations this fall. Like the previous studies conducted by the Institute, this effort will be of the process/impact nature. However, there will be a significant shift in emphasis.

The Institute will follow a mutually agreed upon format and schedule (attached) which focuses upon recommendations. Recommendations for change are to be pragmatic, taking into account the CAA's capability and circumstances.

The evaluation report will be as much for the use of the CAA as for the Regional Office. Under this arrangement the Institute is solely responsible for the conduct of the study, including the report, which it will present directly to the CAA. The Regional Office will be cognizant of this effort and may seek to require the CAA to act upon certain recommendations, but the CAA will be directly responsible for reflecting upon the recommendations and deciding what to do about them.

Based upon experience gained from this approach, the Regional Office hopes to realize two general objectives: a technique we can use ourselves, as needed, and an evaluation handbook for CAAs to use in performing annual program assessments.

In making the selection of the three CAAs to be evaluated, we would like to consider those CAAs who want to participate in this revised system. Therefore, if interested, please advise Carl W. Shaw of my staff by phone, (415) 556-7895 or letter by October 26.

ALPHONSE RODRIGUEZ
Regional Director

Attachment

cc:
Ed Schoenberger, Institute for Local Self Government
Paul Katz
Rick White

Evaluation Report Format (25-40 pages)

(Est. No. Pages)

(1) Transmittal Letter*

(1) Title page*

(1) Table of Contents

(1) Introduction*

(1,2) Summary (Key findings and conclusions; plus list of recommendationa)

(to 24) CSA General Standards of Effectiveness*

I. Planning and Evaluation

II. Refocussing Community Assistance

III. Parcipation of the Poor

IV. Resource Mobilization

V. Innovative Projects

VI. Employment Opportunity

(to 10) Appendices (may include: implementation plan, plus charts tables maps, etc.)

*Additional detail attached

Transmittal Letter (to grantee) will state:

"Copies of this report are also being provided to the CSA Regional Office".

Title Sheet will state:

"Conducted by the Institute for Local Self Government through a grant from the Community Services Administration, Region IX".

"While CSA has prescribed a specific report format and general methodology, the substance of this report (findings, conclusions and recommendations) are solely those of the Institute and its evaluation team".

INTRODUCTION

The purpose of this evaluation is to provide you, a CSA grantee, with an assessment of your performance on the functions and goal described in Title II, Section 201 of the CSA Act of 1978, (and the General Standards of Effectiveness, CSA Instruction 7850-1). The report will highlight your strengthes and weaknesses in carrying-out the six program management processes (Planning and Evaluation, Refocussing Community Assistance, Participation of the Poor, Resource Mobilization, Innovative Projects, and Employment Opportunity) as well as measure the effect and impact of employment-related projects in meeting the goal of consumer self-sufficiency.

Recommendations will be made in recognition of: need, current resources, existing community conditions and implementation capabilities. The CAA should be capable of implementing all recommendations for change within one year, as a rule.

This evaluation examines CSA program management processes and consumer impact. It does not deal with compliance issues or functional emphases, such as financial management. Rather grantee board, grantee staff and other community persons are contacted solely to understand your program operation and its effects.

In brief, here is the Region IX approach to conducting process/impact evaluations. The Institute will assemble an evaluation team which will produce a draft report within one week - a final report within six weeks - of the evaluation visit. A core team of the same two to four persons will be supplemented at the interview stage (evaluation visit) by three to six other persons. Each of the following steps will take about a week:

1. Background Preliminary visit. Assessing documentation, including multi-year plan, 419 and 440. Meeting with grantee to explain process, clarify grantee accomplishments, identify interview requirements and handle logistics.

2. Final preparation. Preparing interview schedules and forms.

3. Evaluation visit. Orienting supplemental team members completing interviews; consolidating and examining findings; writing and presenting oral report to grantee.

4. Draft report. Completing and submitting the draft report to the grantee for comments (30 day review).

5. Final Report. Completing and submitting the final report to the grantee within one week of: receipt of CAA comments or expiration of the 30 day review period.

I. Planning and Evaluation

Strengthened community capabilities for planning and coordinating so as to insure that available assistance related to the elimination of poverty can be more responsive to local needs and conditions.

To what extent did the Agency conduct a policy and program management process including: needs assessment, policy agreement/analysis, implementation and evaluation?

To what extent did the Agency coordinate these activities and/or share derived information with other poverty-related agencies in the community?

Findings

Conclusions

Recommendations

II. Refocusing Community Assistance

Better organization of services related to the needs of the poor.

To what extent did the Agency influence other poverty-related agencies to refocus their efforts for the benefit of low-income persons?

Findings

Conclusions

Recommendations

III. Participation of the Poor

Maximum feasible participation of the poor in the development and implementation of all programs and projects designed to serve the poor.

To what extent did low-income persons influence the design of programs assisting them - Agency programs, as well as those of other poverty-related agencies?

Findings

Conclusions

Recommendations

IV. Resource Mobilization

Broadened resource base of programs directed to the elimination of poverty so as to include all elements of the community able to influence the quality and quantity of services to the poor.

To what extent did the Agency bring about the investment of new resources in the community aimed at assisting the low-income - from public and private sources?

Findings

Conclusions

Recommendations

V. Innovative Projects

Greater use of new types of services and innovative approaches in attacking causes of poverty, so as to develop increasingly effective methods of employing available resources.

To what extent did the Agency develop approaches to poverty problems unique to this community, either of an influence, or of a service (demonstration) nature?

Findings

Conclusions

Recommendations

VI. Employment Opportunity

Maximum employment opportunity, including opportunity for further occupational training career development, for residents of the area and members of the groups served.

To what extent did the Agency influence or provide services designed to enhance employment opportunities through support services, training, job design or economic development?

What was the effect of this effort?

What impact does this represent on low-income employment needs community-wide?

Findings

Conclusions

Recommendations

EVALUATION MATERIALS

Table of Contents

EVALUATION TIMETABLE

Week 1	Pre-evaluation visit
2	Pull together evaluation team
3	Analyze documents and pre-evaluation forms
4	Write drafts of Chapters 2 and 3/Team training materials
5	Team training and final logistics
6	On-site evaluation visit
7	Write drafts of Chapters 4, 5, 6 and 1
8	Circulate draft
9	Review comments
10	Final draft of report

PRE-EVALUATION VISIT

Objectives:

- to explain what the evaluation is about;
- to get buy-in and commitment to cooperate;
- to discuss all the information that we need -- with special attention to the accomplishments (PE-9);
- to make all the logistical arrangements, establish a contact who will coordinate and be the liaison with the ILSG.

Information:

- Leave them the packet of pre-evaluation forms (PE-1 through 9) with requests that they fill them out and mail back to us in a week.
- Leave them with the list of documents we'd like to borrow and ask them to mail them to us in a week.

Logistics:

- Give them our timetable and requests for interviews, client phone numbers, meeting attendance, etc. Ask them to begin as soon as possible to set up appointments, etc. Where to have the meetings, where the team should stay, who the ILSG should contact, etc.

ON SITE EVALUATION

Monday

9 a.m. - 3 p.m.	Officials Group Meeting	4 team members
	Official interviews or client phone calls (6)	2 team members
6 p.m. - 8 p.m.	Team meeting and preparation for client meeting	6 team members

Tuesday

9 a.m. - 5 p.m.	Official interviews -12	4 team members
	Client phone calls -25	2 team members
7 p.m. - 9:30 p.m.	Client Group Meeting (25)	6 team members

Wednesday

9 a.m. - 5 p.m.	Official interviews 12	4 team members
	Client phone calls (25)	2 team members
7 p.m. - 9 p.m.	Team Meeting	6 team members

Thursday

9 a.m. - 12 p.m.	Official interviews 6	4 team members
	Client phone calls (12)	2 team members
1 p.m. - 6 p.m.	Team Meeting	6 team members

Approx. 65

OFFICIALS

GROUP MEETING

(full day)

Who's Invited?

CAA and County Officials + others

- Look at list of accomplishments provided at the pre-evaluation visit (PE-9) to determine what County officials to invite
- Invite members of the Board of Supervisors and CAO's Office
- CAA Director and key staff

Agenda

1. Introduction and explanation of the evaluation process and objectives.
2. Have officials fill out impact questionnaire (Q-4).
3. Group discussion around the accomplishments matrix (Q-3).
4. Open-ended discussion around the problems facing the CAA and suggestions for improvement.

CLIENTS

GROUP MEETING

(half day - hold in the evening)

Who's Invited?

Clients and CAA Program Staff

- Invite a representative number of clients from each program and/or delegate agency.
- Invite those who are active on the Board. check!
- CAA Staff

Agenda

1. Introduction and explanation of the evaluation process and objectives.
2. Have clients fill out impact questionnaire (Q-1) - walk them through it.
3. A structured discussion around some of the accomplishments developed in the Officials Group Meeting; under Standard III and VI perhaps, or others that need verification. The discussion would address the truth of the accomplishment, the perceived role of the CAA and the significance or impact of the accomplishment on the community.

Client Phone Calls

- Administer questionnaire Q-1 over the phone.
- Need phone numbers and best times to call.
- Aim for a total (including questionnaires received from the Client Group Meeting) of 25 clients from each program if possible (or some other representative percentage). Too Many?

Official Interviews

- Follow-up interviews with officials who attended the Officials Group Meeting to administer the Policy Questionnaire (Q-2).
- Set up interviews with other officials (who perhaps missed the meeting) and administer Q-2 and Q-4, the policy and impact questionnaires. Also, the official can be asked about the accomplishments as well (Q-3).

EVALUATION FORMS

Pre-evaluation		Final Report Chapter
PE-1	Demographic information	2
2	County profile	2
3	CAA background information	3
4	Organizational structure	3
5	Historical development	3
6	Program descriptions	3, 4, 5
7	Decision making	3, 5, 6
8	Mobilization of resources	3, 5
9	Accomplishments	5

Questionnaires

Q-1 CLIENT IMPACT

PART A	Self-sufficiency factors	4, 5, 6
B	Community needs and concerns	4, 6
C	CAA and its programs	4, 6
D	Interviewee characteristics	4

Q-2 OFFICIALS POLICY

PART A	Policy development	5, 6
B	Planning and evaluation	6
C	Program operation and implementation	6
D	Coordination and cooperation with other agencies	5, 6
E	Mobilization of resources	5

Q-3 STANDARDS OF EFFECTIVENESS GROUP PROCESS

I	Planning and ~~coordination~~ evaluation	5, 6
II	Better organization of services	5, 6
III	Participation of the poor	5, 6
IV	Broader resource base	5
V	Innovative programs	5
VI	Employment Opportunities	5

Q-4 OFFICIAL IMPACT

PART A	CAA emphasis and low-income needs	5, 6
B	CAA impact and problems	4, 6

EVALUATION FORMS (Continued)

Documents	Final Report Chapter
• Organizational	
- organizational chart for CAA	3
- list of CAA staff and what they do	3
• Evaluations	
- self or 3rd party evaluations done in the last 3 years	6
- CSA forms -- CAP 440, CAP 12	6
• Delegate Agencies	
- CSA forms -- CAP 85, CAP 87, CAP 11	3
- any publications agency puts out on delegate agencies	3
• General Information	
- community/county profile	2
- agency publications	?

• Additional ?

ED

EVALUATION REPORT FORMAT

(Modified from Appendix A - See Attached)

- Transmittal letter
- Title page
- Table of contents

<u>Chapter 1</u> - Summary, Findings, Conclusions, Recommendations

- evaluation team meetings
- Q-3 process
- Q-4B What problems does CAA face?

<u>Chapter 2</u> - County & CAA Profile PE-1-8

<u>Chapter 3</u> - Program Effectiveness - Increasing Client Self-sufficiency

1. Impact on self-sufficiency factors

    by senior/non-senior
    by program
    by number of clients with at least one change
    by CAA role
    by low income needs

2. Impact on which groups? Q-1

3. Important accomplishments Q-4

<u>Chapter 4</u> - CAA Program Strategies - Meeting the Standards of Effectiveness Q-3

1. Planning & evaluation Q-3
    - composition, nature, role of Board Q-2, PE-7
    - planning capacity of CAA Q-2
    - needs assessment process Q-2
    - program operation/implementation Q-2
    - evaluation Q-2
    - client vs. official need Q-1B, Q-4A
    - CAA emphasis vs. need Q-4A

(Chapter 4 - con't.)

2. Refocussing community assistance - influence other agencies (Q-3)
   - Q-2D&B Coordination/Cooperation with other agencies
   - See role of CAA in Q-1 and Q-3
   - CAA vs. non-CAA official view about CAA efforts

3. Participation of the poor (Q-3)
   - low income participation on the Board PE-7
   - CAA impact on community influence Q-2A
   - community awareness/opinion of CAA Q-1C, Q-2C

4. Resource mobilization (from public & private) (Q-3)
   - sources on non-CSA funds PE-8
   - mobilization efforts Q-2E
   - role of CAA Q-1A, Q-3

5. Innovative projects (Q-3)
   program descriptions PE-6

6. Employment opportunity (Q-3)
   program descriptions PE-6

<u>Appendices</u>

1. Demographic profile of client and official interviewees
2. Description of methodology
3. Evaluation team, etc.

APPENDIX A

Evaluation Report Format (25-40 pages)

(Est. No. Pages)

(1) Transmittal Letter*

(1) Title page*

(1) Table of Contents

(1) Introduction*

(1,2) Summary (Key findings and conclusions; plus list of recommendationa)

(to 24) CSA General Standards of Effectiveness*

I. Planning and Evaluation

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III. Parcipation of the Poor

IV. Resource Mobilization

V. Innovative Projects

VI. Employment Opportunity

(to 10) Appendices (may include: implementation plan, plus charts tables maps, etc.)

*Additional detail attached

OUTLINE OF FINAL REPORT

	Source of Information
<u>Chapter 1</u>	
Issues and Recommendations	• evaluation team meetings • total evaluation data
<u>Chapter 2</u>	
County Profile	• PE-1 • PE-2
<u>Chapter 3</u>	
CAA - History and Structure	• PE-3 • PE-4 • PE-5 • PE-6 • PE-7 • PE-8
<u>Chapter 4</u>	
CAA Impact on Clients - Program Effectiveness in Increasing Client Self-Sufficiency	
A. Self-Sufficiency Factors	• Q-1 Part A
- senior/non-senior	• Q-1 Part A
- program	• Q-1 Part A; PE-6
- number of clients with at least one change	• Q-1 Part A
- CAA role	• Q-1 Part A
- low-income needs	• Q-1 Part B & C
B. What Groups Are or Are Not Being Served?	
- official opinion	• Q-4 Part B
- race, sex, etc.	• Q-1 Part D, #1-4; PE-1
- poverty	• Q-1 Part D, #5
<u>Chapter 5</u>	
CAA Program Strategies - Meeting the Standards of Effectiveness	
A. Verified Accomplishments	• PE-9; Q-3
- CAA role	• Q-3; Q-1 Part A
- CAA emphasis	• Q-4 Part A
- programs	• PE-6
- resources mobilized	• PE-8; Q-2 Part E
- participation of poor	• PE-7; Q-2 Part A
- cooperation with local government	• Q-2 Part D

OUTLINE OF FINAL REPORT (Continued)

	Source of Information
Chapter 6	
Politics, Planning and Policy - CAA Effectiveness in Meeting Low-Income Needs	
A. Did CAA Programs Address Low-Income Needs?	
- client need vs. official need	• Q-1 Part B; Q-4 Part A
- CAA emphasis vs. client need	• Q-1 Part B; Q-4 Part A
- impact on self-sufficiency vs. client need	• Q-1 Part A & B
B. Look at Various Policy and Program Components That Might Explain the CAA's Success or Failure	
- composition, nature and role of Board	• PE-7; Q-2 Part A; Q-3 III
- needs assessment process	• Q-2 Part A & B
- program operation and implementation	• Q-2 Part C
C. Did the CAA Mobilize Public Resources and Make Sure the CAP Was Well Understood By the County?	
- CAA vs. non-CAA official opinion about client needs vs. CAA efforts	• Q-4 Part A
- CAA cooperation with other agencies	• Q-2 Part B & D; Q-3 I & II
D. Did the CAA Maintain Good Community Relations?	
- what CAA programs are popular	• Q-4 Part B
- community awareness and opinion of CAA	• Q-1 Part C; Q-2 Part C
E. What Are the Problems Facing the CAA?	• Q-4 Part B • Q-3 Process

DRAFT 10/3/79

EVALUATIONS STRATEGY

TECHNIQUE

1 group meeting - CAP & County Officials
around accomplishments to meet SOE role of CAP in each

Needed:

- Review of documents to draft a list of accomplishments and standards
- Logistics of getting everyone to meeting
- Need a list of people to invite
- Need an information sheet for officials - what the evaluation is designed to do
- Good group leader and big paper writer
- Need list of accomplishments from CAP staff
- Other questions about relationships, needs assessment, etc.

1 group meeting - Clients & CAP Staff (program people)
around SSF

Needed:

- Simplified questionnaire - 2-3 pages for clients to fill out themselves
- Structured discussion around SSF changes and CAP's role
- Structured discussion around other questions -- did CAP do needs assessment, some verification of SOE, especially #III low-income participation
- Way of selecting clients for this meeting

VERIFICATION

Client phone calls

Needed:

- Carefully selected list of people to call
- Clients notified that they will be called

Officials interviewed

Needed:

- List of and appointments set up with relevant officials
  - those who missed the meeting
  - others
  - re: both SOE and policy-making process

1st Pre-evaluation Visit

objective - to explain what evaluation is about

- get buy in and commitment to cooperate
- leave them with requests for other information we need

2nd Pre-evaluation Visit

- discuss all information we need
- get history, structure, programs and clients of CAP
- set up appointments (confirm)
- perhaps do some policy-making interviews

Team Training

- pick team
- at least half-day to train

ON-SITE

DAY 1	Official Group Meeting	- 1 group leader 1 big paper writer 2 observers/note takers/insight gatherers
	Team Meeting - information gathered tentative conclusions feed in to client meeting	
DAY 2	Client/CAP Group Meeting	- Same 4 people
	Official Interviews (policy-making)	- 2 interviewers
DAY 3	Team Meeting	
	- verification phone calls to clients	- 2-4 people
	- official interviews (policy)	- 2-4 people
DAY 4	Team Meeting	
	- followup phone calls, interviews	- 2-4 people
	- analysis, recommendations team meeting	- 6 or less people

UP FRONT PREPARATION BY US (See Also Chapter 7)

1. Design SSF questionnaire to be filled out by clients at beginning of group meeting and for use in verification phone calls.

2. Develop outline of information we want from the documents and the documents that we want.

3. Develop outlines for CAPs to fill out providing additional information we want, i.e. program descriptions, budgets, accomplishments, etc.

4. Develop outline of final report setting forth what we are looking for and the information that will address each objective.

5. Design policy questionnaires.

6. Develop training material on the evaluation process and the CAP to be evaluated:

   - for the team
   - for the official meeting
   - for the client meeting

7. Design/structure the group meetings

8. Make certain methodological decisions:

   - regarding client sampling
   - regarding Headstart or not

Institute for Local Self Government

Community Action Agency Policy, Management and Impact Evaluation

SONOMA COUNTY PEOPLE FOR ECONOMIC OPPORTUNITY, INCORPORATED

The Sonoma County People for Economic Opportunity has invited the Institute for Local Self Government to conduct an evaluation of its activities and programs. This evaluation is supported by a grant from the Regional Office of the Community Services Administration. It will focus on the PEO's impact upon clients, its overall accomplishments and its basic decision-making processes. The evaluation team, consisting of a bi-lingual group of staff and Boarm members from other Community Action Agencies, together with Institute staff, will interview some 60 clients and 60 "Officials" of PEO, local government, and private voluntary and citizen based organizations.

The evaluation team will produce a report which will present a picture of the efforts of PEO together with a set of recommendations for SCPEO improvements, if needed.

The methodology employed in this evaluation is part of an overall Regional effort to strengthen the ability of community action agencies to improve the effectiveness of their programs.

Members of the evaluation team include:

1. Luz Marina Benson is the Executive Director of the Concilio Latino Americano. She is also a member of the Board of Directors for North Coast Opportunities, Inc. Ms. Benson's experience includes several years in the area of quality control for private industry and more recently, as a bi-lingual counselor for Mendocino Community College.

2. Maureen Diehl is currently a student intern at the Institute for Local Self Government; and a graduate student in Social Welfare Administration and Community Organization at the University of California School of Social Welfare. Before resuming her education, Ms. Diehl was a program director at Adams County Community Action Agency in Gettysburg, Pennsylvania.

3. Rita Hays has worked with Contra Costa County Community Action Agency since 1970. During that time she has been involved in most of the Agency's programs and operations including planning, evaluation, and community organization. In Ms. Hay's present position of Program Coordinator she is responsible for the day-to-day operations of her agency.

4. Kathy Humphrey is a Research Associate at the Institute for Local Self Government. She has directed the research and authored a publication on local government contract compliance EEO responsibilities, serves as editor of Affirmative Action in Progress, and has participated in a large number of local government and CAA on-site activities. She has traveled extensively in Asia and Latin America. She is currently a doctoral candidate at the University of California School of City Planning and serves as on-site coordinator of the CAA evaluation project.

5. Marc Litchman is a Research Assistant for the Institute for Local Self Government. He is currently Student Advocate, an elected position on the University of California Campus at Berkeley. He participated in the preparation of this evaluation and has designed instruments for processing the evaluation data.

6. John Saavedra is Director for Economic Development for Monterey County Community Services Department. He has had many years of experience implementing programs for low-income housing and economic development. Mr. Saavedra was Mayor of the City of Soledad and is a past president of the League of United Latin American Citizens.

7. Betti Milner Sands is Field Unit Coordinator for the Association Community Action Program in Hayward, California. Her extensive career in human services includes directorships in both a Headstart and Community Action Program. Ms. Sands has also worked as a field liason for O.E.O., Region IV, and served in various capacities for CETA Prime Sponsor.

8. Ed Schoenberger is Assistant Director of the Institute for Local Self Government, a research, training and technical assistance organization of the League of California Cities and the County Supervisors Association of California. He has worked on a number of projects including the improvements of local policy, planning and management efforts and has authored and edited a number of publications and articles on human services. He also founded the ILSG publication, Affirmative Action in Progress.

MODEL

SONOMA COUNTY

INTERVIEW SCHEDULE

Monday: February 11	LOCATIONS A	B	
9:00 a.m. - 12:00 p.m.	20 "Officials"		
1:30 p.m. - 2:30 p.m.	0	0	PO
2:30 p.m. - 3:30 p.m.	0	0	PO
3:30 p.m. - 4:30 p.m.	0	0	PO
7:00 p.m. - 9:00 p.m.	10 Clients	10 Clients	

Tuesday: February 12	Client Phone Interviews	A	B	
9:00 a.m. - 10:00 a.m.	C	0	0	PO
10:00 a.m. - 11:00 a.m.	C	0	0	PO
11:00 a.m. - 12:00 p.m.	C	0	0	PO
1:30 p.m. - 2:30 p.m.	C	0	0	PO
2:30 p.m. - 3:30 p.m.	C	0	0	PO
3:30 p.m. - 4:30 p.m.	C	0	0	PO
7:00 p.m. - 9:00 p.m.	C	10 Clients	10 Clients	

Wednesday: February 13	Client Phone Interviews	A	B	C
9:00 a.m. - 10:00 a.m.	C	0	0	0
10:00 a.m. - 11:00 a.m.	C	0	0	0
11:00 a.m. - 12:00 p.m.	C	0	0	0
1:30 p.m. - 2:30 p.m.	C	0	0	0
2:30 p.m. - 3:30 p.m.	C	0	0	0
3:30 p.m. - 4:30 p.m.	C	0	0	0

Thursday: February 14	Client Phone Interviews	A	B	
9:00 a.m. - 10:00 a.m.	C	0	0	PO
10:00 a.m. - 11:00 a.m.	C	0	0	PO
11:00 a.m. - 12:00 p.m.	C	0	0	PO

NOTE:

This schedule allows for:

62 - Official Interviews (0) (Scheduled at designated location.)
56 - Client Interviews (C)
12 - Policy Official Interviews (PO) (Can be scheduled at their office.)

INSTRUCTIONS:

1. With the Model and lists of officials in front of you, write in the addresses of locations A, B & C in the boxes marked.
2. Attach list of officials who will attend the Monday group meeting.
3. Write in "official"'s name for boxes with O's where scheduled.
4. Write in policy officials' names and their locations in PO boxes.
5. Attach list of clients and locations for 4 client group meetings.
6. For clients who can't make these meetings, write in their name and phone number in the time slot in which they will be available.
7. Additional client (phone) interviews can be scheduled in the boxes where there are no official interviews scheduled.

		LOCATIONS		
Monday: February 11				
9:00 a.m. - 12:00 p.m.		attach list		
1:30 p.m. - 2:30 p.m.				
2:30 p.m. - 3:30 p.m.				
3:30 p.m. - 4:30 p.m.				
7:00 p.m. - 9:00 p.m.		attach list	attach list	
Tuesday: February 12	Client Phone Interviews			
9:00 a.m. - 10:00 a.m.				
10:00 a.m. - 11:00 a.m.				
11:00 a.m. - 12:00 p.m.				
1:30 p.m. - 2:30 p.m.				
2:30 p.m. - 3:30 p.m.				
3:30 p.m. - 4:30 p.m.				
7:00 p.m. - 9:00 p.m.		attach list	attach list	

Wednesday: February 13	Client Phone Interviews		LOCATIONS		
9:00 a.m. - 10:00 a.m.					
10:00 a.m. - 11:00 a.m.					
11:00 a.m. - 12:00 p.m.					
1:30 p.m. - 2:30 p.m.					
2:30 p.m. - 3:30 p.m.					
3:30 p.m. - 4:30 p.m.					

Thursday: February 14	Client Phone Interviews				
9:00 a.m. - 10:00 a.m.					
10:00 a.m. - 11:00 a.m.					
11:00 a.m. - 12:00 p.m.					

NOTE:

This schedule allows for:

62 - Official Interviews (O) (Scheduled at designated location.)
56 - Client Interviews (C)
12 - Policy Official Interviews (PO) (Can be scheduled at their office.)

Please don't schedule official interviews for Wednesday, location C, unless absolutely necessary.

TENTATIVE SCHEDULE - DRAFT #1 - 3/12/80

Sunday, March 23

9:30 a.m.	Assemble for Training
12:00 p.m.	Team Lunch
1:00 p.m.	Training Continues
4:00 p.m.	Adjourn
6:00 p.m.	Team Dinner
7:30 p.m.	Meet with KCEOC Executive Director
8:00 p.m.	Assignment Meeting
9:00 p.m.	Adjourn

Monday, March 24

7:30 a.m.	Breakfast - "Any Questions?"
8:30 a.m.	Assemble at KCEOC
9:00 a.m.	Interviews with Officials and Policy Officials & Clients
12:30 p.m.	Team Lunch
1:30 p.m.	Interviews Officials, Policy Officials & Clients
5:00 p.m.	Dinner Meeting - Team
7:00 p.m.	Client Interview Meeting (2)
9:00 p.m.	Adjourn

Tuesday, March 25

9:00 a.m.	Interviews with Officials, Policy Officials and Clients
12:00 p.m.	Team Lunch
1:30 p.m.	Officials Meeting - Accomplishments
4:30 p.m.	Adjourn
8:00 p.m.	DATA PARTY

Wednesday, March 26

9:00 a.m.	Interviews of Officials, Policy Officials & Clients
12:00 p.m.	Lunch
1:30 p.m.	Interviews with Officials, Policy Officials & Clients
7:00 p.m.	Final Team Dinner - Location to be announced.

Thursday, March 27

9:00 a.m.	Interviews with Officials, Policy Officials & Clients
12:00 p.m.	Working Lunch and meeting to finalize:

- Observations
- Conclusions
- Recommendations

Adjourn when agreement is reached.

Friday, March 28

Debriefing Interview with KCEOC Officials:

Ed, Kathy, Maureen

Maureen

KERN COUNTY
INTERVIEW SCHEDULE

INSTRUCTIONS:

1. With the Model and lists of officials in front of you, write in the addresses of locations A & B in the boxes marked.

2. Attach list of officials who will attend the Tuesday group meeting.

3. Write in "official's" name for boxes with O's where scheduled.

4. Write in policy officials' names in PO boxes. We can go to their offices if necessary, so write in their location as well.

5. Attach list of clients and locations for 2 client group meetings.

6. For clients who can't make these meetings, write in their name and phone number in the time slot in which they will be available.

7. Additional client (phone) interviews can be scheduled in the boxes where there are no official interviews scheduled.

		LOCATIONS		
Monday: March 24	CLIENT/PHONE	A	B	C
9:00 a.m. - 10:00 a.m.		RICHARD PRADO	BILL THIESSEN	TOM WILSON (TENTATIVE)
10:00 a.m. - 11:00 a.m.		BRAD TOMASIN	DAVID HEAD GO TO OFFICE * * * *	RON HOLDEN
11:00 a.m. - 12:00 p.m.		GAIL BECKER	LYN BIOABE	DON MURFIN
1:30 p.m. - 2:30 p.m.		BOB ASHBECK	SUE GUERARD	TIM CHRISTENSEN
2:30 p.m. - 3:30 p.m.		JIM BOZARTH	GLORIA CULLER	STAN HARPER
3:30 p.m. - 4:30 p.m.		ED VICTOR	JACK BRIGHAM	CHRIS JOHNSON
7:00 p.m. - 9:00 p.m.		attach list	attach list	

Add Lucy

Tuesday: March 25	CLIENT/PHONE	LOCATIONS A	B	C	D
9:00 a.m. - 10:00 a.m.		MORA DAVIS	MARIO VIZGROS	Ellie	DEE EDWARDS
10:00 a.m. - 11:00 a.m.		BETTY GREEN	JANE TERRILL	MEL DRIGGERS	DELORES RIVAS
11:00 a.m. - 12:00 p.m.		CHRISTENE MORRIS	PHIL NEUFIELD	LILLIE GIVAN	GREGOR HENDRICKS
1:30 p.m. - 4:30 p.m.		ATTACH LIST			

Wednesday: March 26	CLIENT/PHONE	LOCATIONS A	B	C	VISIT
9:00 a.m. - 10:00 a.m.		ROY WRIGHT	RHONDA DILLINGHAM		** LOREN HODGE
10:00 a.m. - 11:00 a.m.		ALOHA TILLER	CHRISTINE NOGUERA		JOSEPHINE HERNANDEZ
11:00 a.m. - 12:00 p.m.		JIM GILCHREST or GEORGE GONZOLES	LINDA HUMMEL		Lacy Henry
1:30 p.m. - 2:30 p.m.		HOWARD THOMPSON	ROBERT SHERK		ROBERT RAMEY KLEOD
2:30 p.m. - 3:30 p.m.			IRMA CARSON		
3:30 p.m. - 4:30 p.m.		JIM FELIZ	PABLO CRUZ		RUBIN BURCIEGA

Thursday: March 27	CLIENT/PHONE	LOCATIONS a	B	C
9:00 a.m. - 10:00 a.m.		TOM FOLSON		TRICE HARVEY
10:00 a.m. - 11:00 a.m.		JOSIE OTT	BILL MUNDAY	JOHN MITCHELL
11:00 a.m. - 12:00 p.m.		CAROL SHARP	HELEN CAMPBELL	CARRIE SCOTT

NOTE:

This Schedule Allows For:

62 - Official interviews (O) (Scheduled at designated location) — Q3, - Q4 - Q2

56 - Client Interviews (C)

12 - Policy Official Interviews (PO) (Can be scheduled at their office) Q2 & Q4

Please don't schedule official interviews for Wednesday, Location C unless absolutely necessary.

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