<u>Draft- ACL SMP Grantee Interview Protocol</u>

Hello, [participant name].

Thank you for joining us to talk about the Senior Medicare Patrol (SMP) program. My name is [insert staff name here]. I am from RTI International, a nonprofit research organization. I am joined by my colleague [insert staff name here]. Are we expecting anyone else to join from [interview participant organization]?

As you may recall from the invitation you received, ACL has contracted with RTI to better understand the current successes and challenges of SMP program implementation, and ways to help grantees better focus on low-income and rural Medicare beneficiaries. We will use the term *Medicare beneficiaries* throughout our discussion with you, but that also includes individuals who are dually eligible for Medicare and Medicaid.

I want to remind you that there are no right or wrong answers to the questions you are being asked. Your participation will not in any way affect your relationship with ACL or your current or future funding. Answers will simply help ACL better understand competing grantee priorities and necessary additional support.

When we complete the interviews, we will share key parts of our notes with ACL. Since a key goal of these interviews is to gather information about program challenges and additional support that may be needed from ACL or the SMP Resource Center, your responses to our questions will be paired with your name and your program's details. This is not to monitor you or your state's individual performance, but rather to better understand competing grantee priorities, any challenges your program may be facing, and needs your program may have so ACL and the Center can better support you moving forward.

Before we begin, I would like to ask you for your permission to record our discussion. The recording is solely to assist us with our notetaking and will not be shared with anyone outside of the RTI evaluation team. The recording will be destroyed upon completion of this project. Do we have your permission to record?
Do you have any questions before we begin?

<mark>[At this point pause to turn the recording on if participant has agreed to be recorded.]</mark>

Participant role

Let's please begin with a bit about your background.

1. What is your role in your organization? What is your role within the SMP program? Does your organization provide SMP services in-house or do you subcontract SMP work out to outside organizations?

2. Is your state SMP program located within the same organization (co-located) as the state's SHIP program?

Programmatic priorities for SMP activities

Let's talk about SMP's [Interviewer reads] official programmatic priorities:

- Providing group education and one-on-one assistance to Medicare beneficiaries on a statewide basis. [Info for interviewer to clarify to participant; use only if needed after asking questions below: *this includes outreach, education and assistance to specific types of beneficiaries such as rural and low-income beneficiaries.*]

- Recruiting, training, and retaining a sufficient and effective team of volunteers, staff and partners to provide high-quality education and one-on-one support for Medicare beneficiaries.

- Monitoring and assessing SMP performance and results through operational and quality measures. [Info for interviewer to clarify to participant; use only if needed after asking questions below: *how you collect data to assess program performance; how you use the performance data to determine needed program changes.*]

- Adapting your SMP program to nimbly respond to changes in the programmatic landscape/meet the needs of Medicare beneficiaries in your target area. [Info for interviewer to clarify to participant; use only if needed after asking questions below: *This includes changes in the Medicare beneficiary population, changes in geographic distribution of beneficiaries, changes in public health need, varied beneficiary needs by age, and underserved target populations that may need additional assistance understanding how to prevent, detect, and report Medicare fraud, errors, and abuse.*]

3. As your state's SMP program leader, what do you see as your state's top priority activities for the program? How do you make decisions on what to prioritize?

Successes and challenges in implementing program activities

4. What are the successes, or what has gone well in implementing your SMP program activities?

5. What are the challenges, or what has not gone so well?

   [Possible probes for both questions above, use only if needed—successes/challenges with:

   - implementing statewide coverage; providing one-on-one assistance, group education, and media outreach; establishing a partnership network

   - recruiting, retaining, and managing volunteers, staff, and partners throughout the state; implementing and managing the Volunteer Risk and Program Management (VRPM) policies and procedures as outlined by ACL; equipping staff and volunteers with the information necessary to perform SMP work

   - monitoring, reporting on, and assessing SMP results through operational and quality measures

   - responding to changes in the programmatic landscape; serving current or new target populations or using innovative methods to reach those populations

   - Reaching low-income or rural Medicare beneficiaries

- Collecting and reporting SMP data into SIRS. Probe on systems, capacity, understanding of requirements, etc.]

Outreach and prevention efforts

6. What is the impact of your outreach and education efforts on Medicare beneficiaries?

7. Approximately how much effort and time do you spend on fraud prevention efforts as compared to detection and reporting?

Successes and challenges in reaching low-income or rural Medicare beneficiaries [*if not already discussed above*]

8. ACL is particularly interested in your experience in reaching low-income or rural Medicare beneficiaries.

   a. How do your outreach activities attempt to reach individuals who are low-income or rural?
   b. Let's talk about each of these populations separately. First, have you had any particular successes in reaching low-income beneficiaries? Please describe and give examples.
   c. Have there been any challenges reaching the low-income population? Please describe and give examples.
   d. How about rural beneficiaries? Have you had any particular successes in reaching rural beneficiaries? Please describe and give examples.
   e. Have there been any challenges reaching rural beneficiaries? Please describe and give examples.

Additional support needed

9. ACL is also interested in learning more about support that you get and need for your program activities.

   a. What kind of support are you getting now from ACL?
   b. What kind of support are you getting from the SMP Resource Center?
   c. What could be improved in the kinds of support you get, and how you get that support?
   d. Do you need any additional support from ACL to do your program activities? If so, please describe. [Probe on what activities you need help with (e.g., outreach, data reporting, SMP workforce/team training), the best way for you to get support, etc. Also probe on support to reach low-income or rural Medicare beneficiaries.]
   e. Do you need any additional support from the SMP Resource Center to do your program activities? If so, please describe. [Probe on what activities you need help with (e.g., outreach, data reporting, SMP workforce/team training), the best way for you to get support. Also probe on support to reach low-income or rural Medicare beneficiaries.]

Program data collection and reporting

10. Do you regularly review your state's data that are reported in SIRS? [If grantee says "yes] How often do you conduct your data review?

11. How do you use your state's SIRS data to help make decisions on program priorities and activities? (Probe on how they decide on shifts in prioritized activities, staff count, staff hours, number of education/outreach events).

Closing

12. What are your thoughts on your overall performance? Your overall performance may include education and outreach efforts, performance measure totals, SMP casework processing workload, and other SMP activities. Are there any areas you feel you're doing well in? Areas where you have challenges?

13. Is there is anything that I have not asked about that we should know or anything else you would like to share with us?