# CCBHC Needs Assessment Practical Tool #3: Interview Scripts and Thematic Organizer

*This tool was designed by the* [*CCBHC-Expansion Grantee National Training and Technical Assistance Center*](https://www.thenationalcouncil.org/program/ccbhc-e-national-training-and-technical-assistance-center/training-events/on-demand-modules-lessons/) *(CCBHC-E NTTAC) and* [*Bowling Business Strategies*](https://www.bowlingbizpa.com/) *as part of a suite of resources to support CCBHC organizations in their needs assessment. The tools all compliment the CCBHC Needs Assessment Toolkit.*

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## Sample Script: Existing or Potential Partner Agency

### Opening Statements

**INTERVIEWER:** Thank you so much for joining me today. My name is [insert name], and I am [explain role at Organization]. We are speaking with community stakeholders as part of our CCBHC community needs assessment process. We are excited to hear from you and learn more about [Partner Organization]’s work.

[If you think it would be helpful or appropriate, you may provide additional context on the CCBHC model and your organization’s community needs assessment process.]

Before we begin, I want to assure you that your participation in this discussion is completely voluntary. We will be taking notes so we can incorporate your feedback into the needs assessment process, but please know that any information you provide will not be attributed to you publicly without your consent.

[If relevant]: Additionally, we will be recording this session solely for the purpose of accurately capturing your feedback. The recording will not be shared publicly. If you have any concerns about confidentiality, please let me know and we can discuss them further.

The purpose of this interview is to better understand the needs of our community and how [Organization] can meet them. When we say “community,” we are thinking of everyone who needs mental health or substance use care in [insert geographic service area]. This includes our current clients, but it also includes people who may not currently be served by [Organization].

The insights you share today are very important, and your input will help guide how [Organization] provides services and builds partnerships going forward.

Do you have any questions before we begin?

### Introductions

**FACILITATOR:** To start off, please share a little information about yourself and your role at [Partner Organization].

Please also share a brief overview of your organization’s work and the people you serve.

### Interview Questions

**FACILITATOR:** Now, let's move on to our questions.

#### Community Needs

* Are there any specific health issues or concerns that you think are especially prevalent and worthy of attention in our community?
* What do you think are the biggest challenges facing the community? How can [Organization] help address them?

#### Access and Barriers to Care

* What do you think are some of the major barriers to accessing mental health and substance use care in our community?
* Has your organization referred people to our organization for services in the past?
  + How has that referral process worked from your perspective?
  + Are there opportunities for improvement?
* If there were reasons you decided not to refer to us in the past, would you be comfortable sharing what they were?
* How could we make our services more accessible and convenient for the people you serve?

#### CCBHC Services

* Among the services that [Organization] currently provides, which ones are most important to the people you serve?
* Are there any mental health or substance use services that you feel are lacking in our community?

#### Staffing and Workforce

* Can you think of any ways that the staff at our two organizations might be able to partner more often, or more deeply?

#### Partnerships and Care Coordination

* Are there specific groups in our community that you feel are currently not being served by [Organization] (for example, specific cultural or ethnic groups, veterans, LGBTQ+ individuals)?
* Does your organization partner with other service providers in our community?
  + What are some characteristics of your most successful partnerships?
* How could we partner with your organization to better serve the people in our community?

### Wrap-up

**INTERVIEWER:** Before we end, do you have any final thoughts or comments you would like to share?

Thank you for sharing your thoughts and experiences with us today. Your feedback is invaluable in helping us better understand the needs of our community and identify opportunities for [Organization] to better serve people.

If you have any further thoughts or feedback, please don't hesitate to contact me. Have a great day!

## Sample Script: Community Advisory Board

### Opening Statements

**FACILITATOR:** Welcome, everyone. Thank you for joining me today. My name is [insert name], and I'm here to facilitate this group discussion.

Before we begin, I want to assure you that your participation in this discussion is completely voluntary. We will be taking notes so we can incorporate your feedback into the needs assessment process, but please know that any information you provide will not be attributed to you publicly without your consent.

[If relevant]: Additionally, we will be recording this session solely for the purpose of accurately capturing your feedback. The recording will not be shared publicly.

If you have any concerns about confidentiality, please let me know and we can discuss them further. Our priority is to create a safe and respectful environment for everyone to share their thoughts and experiences.

The purpose of this group interview is to gather feedback and opinions from community members and people served by [Organization]. Our goal is to better understand the needs of our community and how [Organization] can meet them. When we say “community,” we are thinking of everyone who needs mental health or substance use care in [insert geographic service area]. This includes our current clients, but it also includes people who may not currently be served by [Organization].

[If you think it would be helpful or appropriate, you may provide additional context on the CCBHC model and your organization’s community needs assessment process.]

The insights you share today are very important, and your input will help guide how [Organization] provides services going forward.

Before we begin, I would like to go over a few ground rules:

* Please be respectful of each other's opinions.
* Please try to speak one at a time to ensure everyone has a chance to be heard.
* We encourage open and honest feedback.

Does anyone have any questions before we begin?

### Introductions and Icebreaker

**FACILITATOR:** To start off, I'd like to ask everyone to introduce themselves and share something positive that's happened to them recently.

### Discussion Questions

**FACILITATOR:** Now, let's move on to our discussion questions. We want to hear about your experiences, and what you think could be improved.

#### Community Needs

* Are there any specific health issues or concerns that you think are especially prevalent and worthy of attention in our community?
* What do you think are the biggest challenges facing the community? How can [Organization] help address them?

#### Access and Barriers to Care

* Do you think it’s convenient to access services at our organization?
* Have you or anyone you know faced any barriers to accessing care from [Organization]?
  + If so, what were they?
  + How might [Organization] remove some of those barriers?
  + What requirements are we placing on people seeking services that we should consider removing (for example, intake requirements, referral protocols)?

#### CCBHC Services

* Among the services that [Organization] currently provides, which ones are most important to you and why?
* Are there any mental health or substance use services that you feel are lacking in our community?

#### Staffing and Workforce

* Do you feel like the staff at [Organization] reflects the community served?
* Do we do a good job creating a welcoming environment for people in our community?
* Can you think of any training topics that might be helpful for [Organization] to provide to staff?

#### Partnerships and Care Coordination

* Are there specific groups in our community that you feel are currently not being served by [Organization] (for example, specific cultural or ethnic groups, veterans, LGBTQ+ individuals)?
* What other organizations in our community are doing impactful work and might be good partners to [Organization]?
  + How might [Organization] partner with them?

### Wrap-up

**FACILITATOR:** Before we end, does anyone have any final thoughts or comments they would like to share?

Thank you all for sharing your thoughts and experiences with us today. Your feedback is invaluable in helping us better understand the needs of our community and identify opportunities for [Organization] to better serve people.

We appreciate your time and participation today. If you have any further thoughts or feedback, please don't hesitate to contact me. Have a great day!

## Sample Script: Person with Lived Experience

*(can be adapted for a Family Member of a Person with Lived Experience)*

While important for all interviewees, it is especially important to go to places where people feel more comfortable when conducting interviews with people with lived experience of mental health and substance use challenges. Consider hosting the interview in a private, comfortable, non-clinical space at your CCBHC or in the community.

You can provide food, and you should consider offering a stipend for the person’s time and willingness to share their knowledge with you. You may also consider providing child care, transportation, or other assistance to minimize the barriers to participation.

Keep in mind that as a person tells their story, they may be reliving a traumatic experience. If needed, pause and provide space, and give the interviewee the opportunity to collect themselves before moving forward.

### Opening Statements

**FACILITATOR:** Welcome and thank you for joining me today. My name is [insert name], and I am [explain role at organization]. I appreciate you taking the time to speak with me today.

Before we begin, I want to assure you that your participation in this discussion is completely voluntary. We will be taking notes so we can incorporate your feedback into the needs assessment process, but please know that any information you provide will not be attributed to you publicly without your consent.

[If relevant]: Additionally, we will be recording this session solely for the purpose of accurately capturing your feedback. The recording will not be shared publicly.

If you have any concerns about confidentiality, please let me know and we can discuss them further. Our priority is to create a safe and respectful environment where you can feel comfortable sharing your thoughts and experiences.

The purpose of this interview is to learn about your firsthand experience, and gather your feedback and opinions on the treatment and care options that are available in our community. What you have to say is very important, and we are interested to hear your thoughts as someone who has personal experience living with a mental health or substance use challenge. [You may wish to be more specific and tailor this description to the person’s lived experience; for example, noting their experience as an individual whose loved one has received treatment for substance use disorder.]

Our goal is to better understand your personal experiences and your needs so we can improve the experience of receiving care at our organization. Your input will help guide how [Organization] provides services going forward.

[If you think it would be helpful or appropriate, you may provide additional context on the CCBHC model and your organization’s community needs assessment process.

Do you have any questions before we begin?

### Introductions and Background

**FACILITATOR:** To start off, can you introduce yourself and tell me a little bit about your background? Please feel free to share only what you’re comfortable sharing.

* Have you[[1]](#footnote-1) ever received care or treatment at [Organization] before?
  + If not, have you ever heard of [Organization] before today? What is your impression of the organization based on what you’ve heard?

### Discussion Questions

**FACILITATOR:** Thank you for sharing that. Now, let's move on to our discussion questions.

#### Community Needs

* When you need help or support, where do you go?
* Do you feel like you have been able to get the help that you need in our community?
  + If not, what has been missing?
* Thinking about yourself, your friends, your family, your neighbors … what are some issues or concerns, especially related to mental health or substance use, that you think are important and worthy of attention in our community?

#### Access and Barriers to Care

* Have you or anyone you know faced any barriers to getting the care you need from [Organization]?
  + If so, what were they?
* How could [Organization] make it easier for you to get the care and support you need in the future?

#### CCBHC Services

* Among the services that [Organization] currently provides, which ones are most important to you and why?
* What mental health or substance use services do you feel are lacking in our community?

#### Staffing and Workforce

* What kinds of experiences have you had with the people who work for our organization? Does anything stand out in your memory, good or bad?
* How do you feel when you walk into our clinic? Is it a welcoming place?[[2]](#footnote-2)
* How could we make our services more welcoming and engaging for you?

#### Partnerships and Care Coordination

* What other organizations in our community are doing good work?
* Can you share any other services or programs that you really rely on?
* How could we work together (or how could we work together more effectively) with some of the organizations and service providers you just named?
* Have you ever had any difficult experiences trying to navigate services across different providers to get what you need?
  + Would you mind sharing more about your experience when you felt like this happened to you?

### Wrap-up

**FACILITATOR:** Before we end, do you have any final thoughts or comments you would like to share?

Thank you so much for sharing your thoughts with us today. I really appreciate you being so open about your experiences. What you’ve shared with me is very helpful and we will take it into account as we think about how [Organization] can better serve people.

We appreciate your time today. If you have any further thoughts or feedback, please don't hesitate to contact me. Have a great day!

## Sample Thematic Organizer

There are many ways to collect and analyze information via qualitative interviews and focus groups. When interviews are conducted online, it can be easy to record and automatically create a full transcript of each interview. There are user-friendly online tools that can help teams identify, tag and analyze key themes in recorded interviews. If you work with a professional evaluator, you may also find that they have robust tools for coding and analyzing interview data.

However, ***you do not need to use a special software program or detailed coding approach to yield important insights from your qualitative interviews.*** We have provided the following simple but effective note-taking matrix that you can use to record key themes during focus groups and qualitative interviews. Feel free to adapt this template to align with the guiding questions for your community needs assessment.

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| --- | --- | --- | --- |
| [Organization] CCBHC Community Needs Assessment  Date:  Interviewee(s): Location/Format: | | | |
| **Topic** | **Current State** | **Current State** | **Potential Opportunities for the CCBHC** |
| **Community Needs and Barriers to Care** | | | |
| **Community Needs** |  |  |  |
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| **Access and Barriers  to Care** |  |  |  |
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| **Community-responsive Staffing and Services** | | | |
| **CCBHC Services** |  |  |  |
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| **Staffing and Workforce** |  |  |  |
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| **Effective Partnerships and Care Coordination** | | | |
| **Partnerships and Care Coordination** |  |  |  |
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1. If interviewing a family member, you can adjust phrasing in this script to ask about the care and needs of their loved one. [↑](#footnote-ref-1)
2. This can be adapted to different settings and services as needed (e.g., “Does your therapy group feel welcoming?” or “Have you seen our outreach workers in the park? Do you feel comfortable talking with them?”) [↑](#footnote-ref-2)