

Beneficiary Visit Protocol

Guidance for Setting Up the Visit

Clarify what you hope to learn, your goals for the visit, and the population you have chosen. Consider how to frame why you are asking for this opportunity, what you hope to gain, how you will use the information and experiences you will hear about. Share your desire to listen and learn.

Listen for what families' goals are for their young children, what services work or do not work well, what services exist that they can not access, and where services and opportunities just don't exist. Consider the definition of access as awareness, affordability, accessibility, availability, accommodation, and acceptability. How do the available services align with the needs of the family and what are the barriers to access?

Population

Select a population that relates to an equity challenge in your state:

- What information and data (quantitative and qualitative) will you use to select your location and beneficiaries?
- What does this information make you curious about?

Location

Recommend that the visit take place outside the state capital (or where your office is positioned) by at least one hour and in a community you do not know. If you choose a different option, share your reason. Hold it in a location where families typically gather and are comfortable.

Recommended Goals of the Beneficiary Visit

1. Consider how individuals with different backgrounds, experiences, and identities experience programs, services, regulations, and policies designed to benefit young children and their families within the state early childhood system.
2. Develop experiences with populations and groups that experience racial inequities and disparities, increasing the focus on institutional and structural barriers to achieve equitable outcomes for children and their families.
3. Support exploration of how historically and today, individuals and communities have fought back, resisted, and organized for self-determination, inclusion, and fairness.

Local Partner

Partner with a local organization. Coalitions and advocates are not substitutes for family members but they might have experience and insight to share that will help establish the specific visit location and support its success.

Length

Expect the site visit or focus group to take no more than 60 to 90 minutes, unless it involves a tour or other special activities suggested by the host.

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Community

Spend some time touring the area, e.g., observe the available grocery stores, the parks and places to play, libraries and cultural institutions, housing, access to health care/hospitals, early childhood and community-based programs, and schools.

Demographics

Collect the demographics of those who participated in the visit; consider using an anonymous form that requests, e.g., age, race, gender, and ages of children.

Compensation

If possible, offer a stipend to the local organizer. Consider having gift cards available on sight to distribute as an immediate “thank you.”

Visit Questions

Determine the 3-5 questions you have for the participants ahead of time.

Example

Select one or two state services, programs, or resources and share with families the intent of those opportunities and have families share how they have experienced those supports.

Here are sample questions to consider. These most likely need to be tailored to your state’s situation and made more specific:

- What are your goals for your children (ages prenatal to five)?
- Whom do you go to for information?
- Tell us about the formal and informal supports you have to foster the development and well-being of your young children?
- What has been your best experience with state services or supports?
- What has been your worst experience?

- Are there services in other communities or for other families in your community that you do not have access to, but would like to access? Explore why. Consider using the definition of access offered above.

Demographics

Collect the number of people who participated and their demographic information.

Follow-Up Post Visit

Share the learning

Identify with whom you are going to share what you heard. You are encouraged to consider sharing with the cross-system team what you learned and debrief to identify the responsibility of different systems in response to what was heard.

Thank You

Send thank you notes and share with the families who participated what you learned and what impact they had on your thinking and/or actions.

Post-Visit Reflection Questions

Consider the following questions as you reflect on and debrief after the visit.

1. What did you learn? For example:
 - a. What opportunities and access to resources do families have?
 - b. What opportunities are missing?
 - c. Are there some opportunities being offered that families are not accessing? Did you discover possible reasons?
 - d. How are the state programs and services viewed by families?

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- e. Are there any unintended consequences of the way in which the state works?
 - f. What did you learn about other systems' services and supports?
2. How did the beneficiary visit inform your thinking about the equity work you want to do?
 3. What did you learn about who has authority, e.g., who makes decisions about which services are offered and how they are delivered? What is the process for making changes?
 4. Did you gain clarity about what resources you have and what you could do?
 5. Did you gain insights into the possible role of a cross-systems team?
 6. What would it take to make this a consistent activity in your state or an ongoing part of decision-making or policy-development processes?
 7. What was it like to sit with families and listen to their experiences?
 8. What would you do differently next time or what recommendations would you make to others setting up site visits such as this?

