Interview tool for collecting ROI data ***([Company/Service]* interview guide)**

**VERSION II: February 2024**

**This document provides the second version of our Interview tool for collecting ROI which has been modified to capture workplace and Higher Education services and experience and to include additional cost centres. The document is in two parts. The first is an introduction to the tool, how it has been used and how it has changed over time. The second part is a template that can be adapted for any company/service providing support/intervention.**

1. Background to the Interview Tool

This tool was initially developed in June 2023 and utilised in 8 interviews with BiH users who were receiving this digital support through Health and Social Care. The list of services in Section 2 was developed from a review of the literature and work that was undertaken by YHEC for BiH in 2022.

In November 2023, we wanted to extend the tool to capture specific utilisation of services and support in workplace and Higher Education, so we added several other services to Section 2. This included mental health team visits, University wellbeing support services, student mentors, workplace mentors, employee assistance programme (EAP), employee wellbeing support, workplace needs assessment, and occupational health. We also included a dietician in NHS/private health support and Day centre in social care as this came up in further research and discussions with users.

In this second iteration we also adapted other sections of the tool relevant to workplace and education. This included 1.5 (specific on employment), 2.4 How helpful have services been with regards your university/work experience. 3.3 Has there been any change in employment including volunteering 3.4 Are there any other changes you have seen since using BiH that have impacted your life at University/work/socially? 4.2 Similarly, if you did not have BiH for the past [timeframe], what do you think may have occurred in relation to your life at University/work/socially?, an additional section 5 on Thoughts for the future specifically for students transitioning into workplace, and 6.2 Is there anything that has happened to you in the last 2 weeks, 30 days, 3 months that has affected how you feel or how you have been able to live your life? 6.3 Have there been any other changes that has affected your ability to access support such as a recent diagnosis?

In February 2024 after reviewing data arising from our interviews and data from a baseline survey of 151 new BiH users we added a number of other services including MindLine and Citizens Advice. We also re-ordered and recategorized the list of services to make viewing clearer and also inserted pre-specified information on the units (e.g. Visit, day) and defined the recall time as variable so that this was transparent and recorded. We also revised our unit cost database for all the new services that we were tracking.

With the additional modifications the interview tool has become more comprehensive but also longer. Some sections could be removed if time is limited. At a minimum **Section 2 can be completed on access to services** as this provides the most tangible quantitative data that can be translated into financial costs, though it will also be important to probe on externalities as well (section 6).

The list of services in Section 2 may also be reduced depending on the scope and impact of the service. However, we would recommend also including some of the other qualitative sections firstly as they have yielded valuable insights into other more economic costs related to activities, social, study and workplace and secondly as it provides a space for the interviewee to share their thoughts and experience ensuring that their voice is heard. [Some examples of ROIs](https://braininhand.co.uk/resources/roi-case-study-lola/) estimated using the *[company/service]* questionnaire are available for reference.

2. Generalised Template

**Interviewer background**

*The purpose of this interview tool is to better understand how [company/service] may have contributed to any changes for the [target audience]. Changes include [insert the changes you are hoping to see e.g. service utilisation, social benefits].*

*Compared to a traditional return on investment (ROI) tool, this tool encompasses both the economic benefits from using [company/service] as well as the social benefits, such as [what social benefits would you like to see?]. By including the social benefits, we can begin to understand the wider costs associated with [insert social benefits] and what this means for ROI.*

*The tool has been created as a predominately qualitative tool (section 3 onwards). This is so users have the space to share their experiences in depth if they wish to. It is important to ask follow-up questions to obtain as much useful information related to the impact of [company/service].*

**Introduction**

Thank you for taking the time to speak to me about your experience of [company/service]. We hope this will be a good opportunity for us to [insert what you are hoping to achieve from speaking to the user.]

The tool consists of six sections. First, I will ask you some questions about yourself, then I will ask you about different NHS or private services, social care costs, or any benefits you may receive. The third and fourth section will be a chance for you to share any changes you have noticed in your life as a result of using *[company/service]*. The fifth section will look at transitioning to work and will only be asked if relevant - for example you are a student or unemployed. Finally, we will ask a couple of questions about any other support you may have received which may have also played a role in your service use or how you have been feeling. If I ask you a question that you do not want to answer, just let me know and we can skip.

Do you have any questions?

[If the user has not completed the consent form]

I have a consent form which I will run through with you now. If you could say Yes or No to these questions, I will make a note and send the consent form to you at the end of the session.

Do you have any questions before we start?

**If no, begin the interview.**

**...**

Section 1. Contextual information

**To read to participant:**

I would like to ask you some questions about yourself and how long you have been using [company/service]. We are asking these questions about yourself as we hope to be able to make some predictions about different types of users.

**...**

1.1 What is your age?

1.2 What was your biological sex at birth?

1.3 What is your gender identity and pronouns?

1.4 Do you identify with any of the following?

* Autistic, ADHD, experience anxiety, another mental health difficulty, learning disability, none of the above, other.

1.5 Are you working, studying, volunteering?

* If you are working, how many hours a week do you work?
* If you are working, what is the size of the employer? For example, are there 0-10 employees, 10-50, 50-100 etc?
* If you are working, what type of employer is it? For example, is it a private company, public sector organisation?

1.6 How long have you been using *[company/service]*?

1.7 Is there anything you would like to share that you think may be relevant to know about you?

Section 2. Usage of services

**Interviewer background:**

*When moving to asking the user about their service use:*

* ***Decide on the recall time for utilisation of services since using [company/service]****. If they have been using it for at least a year opt for one year as this will be the most comprehensive, but if they have only been using it for a few months then opt for 3 months or 6 months depending on most appropriate.*
* ***Decide on the recall time for utilisation of services before using [company/service]****. This would ideally be the one year before they started using [company/service] though it is also important to record changes that might have happened over a longer period of time period in the notes, especially in relation to rare events such as time as an inpatient or police interventions.*
* *In completing the Tables, ask whether t****hey have ever used the service.***
* *If they have used the service, then ask the user how often they have been using it before and since using [company/service]. Ensure that you are specific in noting the frequency, the time period and any factors that may affect the quantities imputed. For example, the standard GP visits is 10-15 mins – if their consultations were much longer than this then note this down. If there was a police intervention, how long were the police involved? If there was an ambulance call out – did this result in being taken to hospital?*
* *All appointments could be in person or online and specifying these details in the notes are helpful in the costings. If the interviewee is able to remember how they paid/pay for a service that is also useful to note down.*
* *There is also a section for Other – any other services or support they have accessed*.
* *As there are many cost items to go through, break down the questions so that you ask about each thematic area (each Table) - so any services related to NHS? Any services accessed privately, any services related to social services, any services related to Higher education? Workplace and then other? Although the Tables seem extensive, for many most people will say never accessed so this section should usually not take longer than 10-15 minutes depending on their level of utilisation. Try and have this as a conversation rather than a checklist.*
* *The Tables below represent the list of services relevant to mental health and life skill support for neurodivergent people or those experiencing anxiety.* ***The intervention being provided by your specific company/service may touch on different services so it is important to first do a mapping of potential services beforehand with relevant stakeholders.***

**To read to participant:**

This section will ask you questions about different services you may have accessed in the past or are currently accessing. When going through the list, I would like you to think about **whether you have accessed them in relation to anxiety, mental health or wellbeing.**

**First, I am going to ask you about NHS services.....**

*[For example, for A&E attendance, we wouldn’t need to know if you had hurt yourself accidentally at playing football, but we would like to know if you have been to A&E because you have been feeling anxious or were in a crisis. We don’t need to know the details.]*

**RECORD the RECALL time since using [company/service] here: ..........**

TABLE 1. NHS Services

|  |  |  |  |
| --- | --- | --- | --- |
| Service | Ever used? | How often since starting using [company/service]? | How often before [company/service]? |
| [Y/N] | [Daily, weekly, monthly, try to be specific] | [Daily, weekly, monthly, try to be specific] |
| GP consultation  *(10-15 min)* |  |  |  |
| Psychology appointment  *(60 min)* |  |  |  |
| Psychiatrist appointment  *(40-50 min)* |  |  |  |
| CBT Therapy  *(per session)* |  |  |  |
| Therapist appointment  *(60 min)* |  |  |  |
| Counselor appointment  *(40-50 min)* |  |  |  |
| Life coach (Health and wellbeing coach)  *(30-60 min)* |  |  |  |
| Dietician  *(per session)* |  |  |  |
| Occupational therapist appointment  *(60 min)* |  |  |  |
| Speech and Language therapist  *(60 min)* |  |  |  |
| Psychiatric Nurse (Mental Health Nurse)  *(60 min)* |  |  |  |
| Community nurse appointment (District nurse)  *(per contact)* |  |  |  |
| Outpatient attendances  *(Per attendance)* |  |  |  |
| Living in hospital as a mental health patient  *(per day)* |  |  |  |
| A&E attendance  *(per visit)* |  |  |  |
| (Mental Health) Crisis Resolution/Home Treatment Team  *(per team contact)* |  |  |  |
| Mental health team (e.g community)  *(per engagement)* |  |  |  |
| Ambulance service  *(per incident)* |  |  |  |
|  | | | |

TABLE 2. Private Health, wellbeing and life skill Services

|  |  |  |  |
| --- | --- | --- | --- |
| Service | Ever used? | How often since starting using [company/service]? | How often before [company/service]? |
| [Y/N] | [Daily, weekly, monthly, try to be specific] | [Daily, weekly, monthly, try to be specific] |
| GP consultation  *(10-15 min)* |  |  |  |
| Psychology appointment  *(50-60 min)* |  |  |  |
| Psychiatrist appointment  *(60 min initial)*   *(30 min follow up)* |  |  |  |
| Therapist appointment  *(50-60 min)* |  |  |  |
| Counselor appointment  *(40-50 min)* |  |  |  |
| Life coach  *(60 min)* |  |  |  |
| Dietician  *(60 min)*  *(30-45 min follow up)* |  |  |  |
| Occupational therapist appointment  *(60 min)* |  |  |  |
| Living in hospital as a mental health patient  *(per night)* |  |  |  |
| CBT Therapy  *(50-60 min)* |  |  |  |
| Cleaner  *(60 min)* |  |  |  |
| Personal Assistant  *(60 mi*n) |  |  |  |
|  | | | |

TABLE 3. Social Care

|  |  |  |  |
| --- | --- | --- | --- |
| Service | Ever used? | How often since starting using [company/service]? | How often before [company/service]? |
| [Y/N] | [Daily, weekly, monthly, try to be specific] | [Daily, weekly, monthly, try to be specific] |
| Social worker visit  *(60 min)* |  |  |  |
| Support worker visit  *(60 min)* |  |  |  |
| Support group visit  *(Per client attendance)* |  |  |  |
| Assisted living  *(per week)* |  |  |  |
| Accommodation in residential home  *(per week)* |  |  |  |
| Day centre  *(per attendance)* |  |  |  |
| Carer to visit home  *(60 min)* |  |  |  |
| Transport costs  *(per day)* |  |  |  |
|  | | | |

TABLE 4. Higher Education support

|  |  |  |  |
| --- | --- | --- | --- |
| Service | Ever used? | How often since starting using [company/service]? | How often before [company/service]? |
| [Y/N] | [Daily, weekly, monthly, try to be specific] | [Daily, weekly, monthly, try to be specific] |
| Counselor appointment  *(40-50 min)* |  |  |  |
| Learning support services visit  *(per session)* |  |  |  |
| University wellbeing support services  *(per hour)* |  |  |  |
| University mental health advisor  *(Per hour)* |  |  |  |
| University Disability Advisor  *(Per hour)* |  |  |  |
| Student Mentor  *(60 min)* |  |  |  |
| Specialist or other professional mentor  *(60 min)* |  |  |  |
| Academic tutor appointment    *(60 min)* |  |  |  |
|  | | | |

TABLE 5. Workplace support

**Note:** *Please also consider services you have used as part of an Employee Assistance Programme*

|  |  |  |  |
| --- | --- | --- | --- |
| Service | Ever used? | How often since starting using [company/service]? | How often before [company/service]? |
| [Y/N] | [Daily, weekly, monthly, try to be specific] | [Daily, weekly, monthly, try to be specific] |
| Counselor appointment  (outsourced)  *(40-50 min)* |  |  |  |
| Mental health/psychologist (outsourced)  *(50-60 min)* |  |  |  |
| Workplace mentor  *(60 min)* |  |  |  |
| Employee wellbeing support  *(60 min)* |  |  |  |
| Workplace needs assessment  *(Per assessment)* |  |  |  |
| Occupational health  *(60 min)* |  |  |  |
| Job coach appointment  *(60 mins average)* |  |  |  |
|  | | | |

TABLE 6. Societal, public purse support

|  |  |  |  |
| --- | --- | --- | --- |
| Service | Ever used? | How often since starting using [company/service]? | How often before [company/service]? |
| [Y/N] | [Daily, weekly, monthly, try to be specific] | [Daily, weekly, monthly, try to be specific] |
| PiP daily living (low rate) – Personal independence payment  *(per week)* |  |  |  |
| PiP daily living (high rate)  *(per week)* |  |  |  |
| PiP mobility (low rate)  *(per week)* |  |  |  |
| PiP mobility (high rate)  *(per week)* |  |  |  |
| Disabled Students Allowance  *(per year)* |  |  |  |
| Access to work scheme  *(per year)* |  |  |  |
| Employment and support allowance  *(per week)* |  |  |  |
| Universal credit  *(per month)* |  |  |  |
| Disability premium  *(per week)* |  |  |  |
| Police interventions  *(per call out)* |  |  |  |
| Missing persons investigations  *(per event)* |  |  |  |
| Calls to Mental health Helplines such as Mindline and Samaritans  *(per call)* |  |  |  |
| Appointments with Citizen Advice  *(per person)* |  |  |  |
|  | | | |
| OTHER - Including charities, apps, online services, support groups, alternative/holistic treatments such as acupuncture, hypnotherapy, herbalist |  |  |  |

2.2 Are there any other services you have used that we didn’t cover?

Add those to the Table under ‘other’

2.3 Why do you think these changes in service use may have happened?1

2.4 How helpful have these services/adjustments been in regards to your university/work experience?

Section 3. [Company/service] support and changes in other means of support

**Interviewer background:**

*These questions are open questions therefore they will need follow-up questions, prompts to encourage more in-depth answers. Listen carefully to the respondents' answers and see which parts you think could be spoken about in more depth to help you get the information you need.*

**To read to participant:**

This section of the interview will ask you some questions about how [company/service] may have supported you in different areas of life. We encourage you to share as much detail as you are comfortable with, and examples of changes you have seen.

**...**

3.1 Since you started using [company/service] have you noticed a difference in your day-to-day life?

*[Prompts: what changes have you noticed?; How does this change your day-to-day activities?; To what extent do you think these changes are a result of your engagement with [company/service]?; How has [company/service] supported you?]*

3.2 Have you noticed any changes in how you rely on your support network after you started using/engaging with [company/service]?

*[Prompts: insert what you would like to see from this question. For example, is it related to family, friends, phone calls, driving to appointments, taking time off work etc.. what happened before and what the situation is now.]*

3.3 Has there been any change in employment including volunteering?

*[Prompts: Have you secured employment? Have you started volunteering? Details on hours]*

3.4. Are there any other changes you have seen since using/ engaging with [company/service] that have impacted your life at University/work/socially?

*[Prompts: insert any other successes you hope to see based on your assumptions]*

Section 4. What [company/service] support means to you

**Interviewer background:** *The “What if” is to help us to better understand what costs could be saved from delaying or preventing the need for managing crisis events or providing a support package. This is particularly relevant when someone is not currently assessing support as they are not part of the system or are concerned about asking for help.*

**To read to participant:** This section looks at how *[company/service]* could have supported you at an earlier stage, and what you think may or may not have happened if you did not have [company/service].

**...**

4.1 If you did not have access to *[company/service]* for [duration they have been using *[company/service]* what do you think may have occurred in relation to your need for support?

*[Prompt – would there have been crisis events that may have needed management or intervention of some kind?]*

4.2. Similarly, if you did not have *[company/service]* for the past [timeframe], what do you think may have occurred in relation to your life at University/work/socially?

*[Prompts: add in prompts based on what you would like to see here]*

4.3 Do you feel better equipped to face challenges due to using *[company/service]*?

* *How?*
* *Do you have examples from before [company/service] where you have found it difficult to manage and how [company/service] now supports this?*

4.4 If you were no longer had access to *[company/service]*, what would that mean for you?

* *How has [company/service] supported you to feel more confident in applying strategies?*
* *Link to both costs and independence.*

Section 5. Transitioning to work

**Interviewer background:** *This section is only relevant to those who are looking to transition into work. You should be able to identify whether this is relevant from the interviewees responses in section 1 but it is good to clarify with the interviewee now before commencing or skipping this section.*

**To read to participant:** This section looks at transitioning to work which we know may not be relevant for all, so we can leave some or all of these questions blank if needed. We are asking these questions to understand how people feel about transitioning to workplace.

5.1 Are you seeking employment or considering it in the near future?

*If no, skip to Section 6.*

5.2 How do you feel about seeking employment?

*Prompt: Any fears/concerns? What would you look for in an employer? What support might you need?*

5.3 How do you feel about being in work?

*Prompt: What adjustments would you need/want? Any fears/concerns? Would you disclose diagnosis to an employer? At what point?*

5.4 Would you find *[company/service]* useful whilst you transition to a workplace?

*Prompt: How? Do you think you would use it any differently? Do you think employment feels less daunting than before you started using [company/service]?*

Section 6. Externalities

**Interviewer background:** *There may be other things going on in the interviewees life that may be affecting their use of services or their general health or wellbeing and it is important to capture these.*

**To read to participant:**

We are asking this question so we can get a bigger picture understanding of other factors that may influence how you have been feeling and your use of services.

**...**

6.1 Is there any other support you have received since using *[company/service]* that you feel has contributed to these changes alongside *[company/service]*?

*[Prompt – For example professional services such as counseling, assistive technology or new relationships]*

6.2 Is there anything that has happened to you in the last 3 months that has affected how you feel or how you have been able to live your life? Examples: moving house, change of tutor/ line manager, loss of a loved one or anything that may have upset you. If you are able, can you explain what this has been and how it may have affected you?

6.3 Have there been any other changes that has affected your ability to access support such as a recent diagnosis?