

Focus Group Sessions: Recruiter Materials

This document will assist with recruiting participants for usability testing sessions scheduled for April 28-29, 2010. There will be 12 one hour sessions held.

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Overview

The Pension Benefit Guaranty Corporation, a US government agency, is redesigning its web site to better meet the needs of plan participants, pension plan sponsors and practitioners, press, policymakers, and the general public. Usability testing is an important tool to evaluate the success of the redesign by measuring users' reactions to the site's layout, functionality, and engagement paths.

Users have been divided into 2 groups for usability testing: Workers & Retirees, and Practitioners. A total of 12 individuals will participate in hour long usability testing sessions, communicating with the moderator via voice and web conferencing.

These documents will provide you with the information and tools you will need to recruit participants for the testing sessions. They include: a script for making your calls, a form to fill out for each participant who signs up, and a schedule and "desired characteristic" matrix to help you keep track of who you have already recruited, and which audience types still need to be recruited.

In addition to the enclosed documents, please keep the following in mind:

- Follow the script as closely as possible. Obviously, you may have to deviate from the script in response to questions from the parties who you call. Do your best to answer their questions, but if you don't know the answer, say so and tell them they can obtain further information by calling (choose the appropriate contact from the following list):

For questions related to the usability testing sessions: Chris Koth at (703) 657-1249.

For PBGC-related questions: the PBGC Customer Contact Center at 1-800-400-7242 or (202) 326-4000; or the PBGC Practitioner Contact Center at 1-800-736-2444 or (202) 326-4242.

- It may be difficult to recruit people that fit the desired characteristics exactly. That is okay -, We don't expect the actual makeup of the groups to completely match the guidelines that follow. If you have trouble filling a certain "slot," document the reason.

- Fill out the Schedule and Participant List as soon as someone signs up, rather than waiting until you have recruited several people. That way, you will always know which audience types you still need to find.
- Pay close attention to the characteristics on the call lists. Many of the desired characteristics are already listed for you.

Participant Groups (Recruit 12 Participants):

Workers & Retirees: Recruit 8

- Recruit 3: Participants in a trustee plan terminated less than one year ago.
- Recruit 3: Participants in a trustee plan terminated one year ago or longer.
- Recruit 2: Participants in an ongoing plan PBGC insures.

Practitioners: Recruit 4

- Recruit 4: Pension Plan Practitioners

When recruiting participants, you should try to recruit approximately the same number of men and women.

Available Time Slots [individual test sessions]:

April 28 - 29

9:30am - 10:30am, 11:00am - 12:00pm, 12:30pm - 1:30pm, 2:00pm - 3:00pm, 3:30pm - 4:30pm, 5:00pm - 6:00pm, 6:30 - 7:30pm

Section 1: Script

Hello. My name is ____, and I'm calling on behalf of the Pension Benefit Guaranty Corporation, a US government agency. We are working on a project to improve the agency's Web site and are asking individuals for their help.

This is strictly research and absolutely no sales or fundraising effort is involved. I'd like to ask you a few questions.

Paperwork Reduction Act notice: This session has been approved by the Office of Management and Budget under OMB Control No. 1212-0053 (expires 12/31/2012). By obtaining OMB approval and telling you about it, we're allowed to conduct this session. Your participation is voluntary and should take about 5 minutes.

Confidentiality: Your responses will be used by PBGC solely for customer service improvement and will be treated with the confidentiality provided by the Privacy Act and the Freedom of Information Act.

Can I confirm that I'm speaking with (name of individual)?

We're looking for participants to spend an hour of their time with us on the phone while they're sitting at a computer connected to the internet, to help us evaluate a new look for the Web site.

This can take place at a time of your choosing, at the location of your choosing. We will be recording the session, and you will receive \$25 for your participation.

You can use your own computer, so long as it is in a quiet area and you have a high-speed Internet connection. Is this the case?

[If no] Thank you so much for your time and have a great day. **[End Call]**

[If yes]

Great. Would you be willing to participate?

[If yes] Wonderful.

[Schedule session time here]

1. Now I'll need to get some information from you. Determine gender.
 - (a) Male
 - (b) Female
 2. Do you regularly use the internet to find information?
 - (a) Yes
 - (b) No **[Do not recruit]**
 3. How comfortable are you with using a computer? Would you say
 - (a) Very comfortable
 - (b) Somewhat comfortable
 - (c) Neither comfortable nor uncomfortable
 - (d) Somewhat uncomfortable **[Do not recruit]**
 - (e) Very uncomfortable **[Do not recruit]**
-

Recruits:

OK, I'm going to give you some information. Do you have a pen? Again, the date and time for the session is _____ and it will be a remote session in which you will login to a web site that allows the moderator to share his/her computer with you. The phone number you will call for the meeting will be 1.866.479.6576. Then you'll need to enter the pin code: 59786475.

Please call Chris Koth at (703) 657-1249 in case you have any questions prior to the session. If something comes up and you can't make it, please call right away so that we can find a replacement. I will be sending you an email containing this information for future reference. Can you provide me with an email address? **[Retrieve email address]** Do you have any questions for me right now?

Answer their questions, if they have any] Thank you very much for participating and we'll talk to you on _____. Have a great day! **[End Call]**

Non-Recruits:

Thank you for that information. Unfortunately, you do not fit the demographic range we are looking for. We appreciate your time and consideration.

After the Call

Send the participant the Participant Information Email. Update the Schedule and Participant List. Lastly, place the Participant Information Form in a folder that corresponds with the session they are registered for.

Section 2: Participant Information Email

This is the text for an informational email that should be sent to each participant within two hours of signing up for the usability test session.

Dear _____,

Thank you for volunteering to participate in the Pension Benefit Guaranty Corporation usability interviews. We know that your time is limited and we greatly appreciate that you are taking time out to talk to us. We believe that your input will help us to design a site that is useful and valuable to all PBGC.gov visitors. As a way of thanking you for your time, you will receive \$25 at the end of the session.

To prepare for the session, please find a quiet location with a computer, high-speed internet access, and a phone. The session will last about an hour. The session will be remote in which you will login to a website and view the PBGC's Web site with the moderator following along. The session will be informal and serves to inform PBGC about its site's ease of use.

If you have any questions, or you find that you are unable to attend, please contact Chris Koth at (703) 657-1249 as soon as possible so that we may find a replacement.

Details About Your Session

Date _____

Time _____

Phone Number: 1 (866) 479-6576

Pin Code: 59786475

Section 3: Schedule and Participant List

Workers & Retirees

	Name	Phone Number	Email	Gender (M/F)
Trusteed Plan Participant – Plan terminated less than one year ago				
1				
2				
3				
Trusteed Plan Participant – Plan terminated one year ago or longer				
4				
5				
6				
Insured Plan Participant				
7				
8				
				#Men: #Women:

Practitioners

	Name	Phone Number	Email	Gender (M/F)
1				
2				
3				
4				
				#Men: #Women:

