



**Discussion Guide:
FIR Research Portal
Draft 2/18/2014**

Study Objectives

1. To ensure FIR public functionality is tailored to address public user transparency needs and expectations
2. To ensure FIR design properly meets public user web interface needs
3. To ensure FIR public outreach plans are effective for increasing awareness of the FIR public portal

Note: Participants to sign a confidentiality statement for groups

Method

- Conduct combination of in-person focus groups and an online bulletin board, based on the results of the audience definition research.
- In person groups will take place in two to three markets.
- Online session will draw from professional users across the country.

Outline

1. Respondent introductions, description of current occupation and interests
2. Discussion of current data use and behavior associated with online data and information portals, both sponsored by the government and private organizations; likes and dislikes of current systems; gaps in informational needs; develop a wish list of informational needs
3. Description of the FIR portal and initial reactions
4. Review of types of data that will be available on the portal and discussion of interest and relevance to current/future needs
5. Demonstration of the FIR system and evaluation of the existing design, including but not limited to issues such as look and feel of the site, applicability of the data available, preferences for static versus dynamic content, perceptions of ease of use, etc.
6. Short discussion about how they'd like to hear and learn about FIR. What sources and channels would they use to learn about the availability of the system?
7. Wrap up

1. Introduction - warm up respondents and set expectations**10 minutes; 10 total****Moderator introduction:**

- o Welcome and thank you for attending
- o Introduce moderator
- o Purpose: to get your thoughts on accessing data online
- o Informal – no wrong answers
- o 1 ½ to 2 hours
- o Speak one at a time. Feel free to agree with each other or offer different opinions
- o Confidentiality assured – no connection of what you say with you by name. First names only.
- o Audio and videotaping and observers
- o Our topic: use of websites, particularly that offer data for you to download or analyze for your own purposes.

Participant Self-introduction:

- o First name
- o Work synopsis, current occupation, interests

2. Context setting and current data use**20 minutes; 30 total**

1. How often do you use the Internet for research and to access different kinds of data that you might need for work, school, or your own use?
2. What devices do you use to access the Internet and how often do you use each type of device?
3. What kind of information do you most often seek? (IF VERY WIDE RANGE, CAPTURE AND CATEGORIZE ON BOARD).
4. How and why do you use this type of information?
5. What information portals do you use most often including both government and private sites? (CAPTURE ON BOARD)
6. Which sites are particularly good? What about the site makes them helpful to you?
7. Let's discuss your recent experiences. I'd like you each to take about 1 minute and write down a recent, specific experience where you were conducting an online search for data

that you wanted to use for either work, school, or for your own curiosity. Describe what you were looking for, what your motivation for searching was, and ultimately what you were going to do with it. What was helpful to the process, and what was frustrating, if anything.

8. Okay, let's share some of our experiences. MODERATOR TO SELECT 2 OR 3 PEOPLE TO SHARE WHAT THEY'VE WRITTEN. Tell me your recent experience – what happened, how were you planning to use the information, etc. MODERATOR TO PROBE FOR SPECIFICS.
9. Now let's think specifically about using any kind of data that comes from the government. The U.S. Government generates many different kinds of information that is accessible to the public, including data about the population, health, science, and the economy. How often do you use or look for government information? What kind of information do you seek? (PROMPT WITH THESE SOURCES IF NEEDED: CENSUS, BUREAU OF LABOR STATISTICS, EMPLOYMENT STATISTICS, AGRICULTURAL INFORMATION, CDC INFORMATION, IMMIGRATION STATISTICS)
10. How do you use this type of information – what do you use it for?
11. How about more specific financial information from the government – such as data on government payments, receipts, debt collection, accounting data – do you access any data like this?
12. If so, where do you find this type of data? How do you use it?
13. How do you currently learn about sources of information like this?
14. What search words do you use?
15. What do you like about current systems? Please describe.
16. What do you dislike?
17. Where are the gaps in the types of information you're seeking?
18. Let's develop a wish list – what kinds of information would ideally be available?
 - a. How would you use this information?

3. Description of the FIR portal and initial reactions

15 minutes; 45 total

The U.S. Treasury has an official website that is a repository of the billions of financial transactions processed by the Treasury each year. Visitors to the site can analyze financial data trends and patterns while gaining insight about federal government accounting, debt collection, receipts and payments.

1. What type of data do you expect to see on this site? Let's talk about the variables that you think would be there. MODERATOR TO CAPTURE ON BOARD
2. What would you **want** to see? CAPTURE ON BOARD
3. What level of detail do you expect? (probe – by geography, by year, what else?)
4. Would you expect the reports to be static (not able to be manipulated; perhaps in a .pdf) or dynamic (you can choose the variables you'd like to see)?

We're going to show you this website...



Transparency. Openness. Access.

This site is designed to provide usable, easy-to-understand summary information about the billions of financial transactions processed by the Treasury each year through interactive reports, dashboards and visuals.

Visitors to the site can analyze financial data trends and patterns while gaining insight about federal government:

- accounting
- collections
- debt management and
- payments

This website supports transparency and accountability by providing easier access to financial information that can be released to the public. Data will be added to the website in phases.

5. What are your reactions to this website? PROBE FOR POSITIVES, NEGATIVES.

6. How interested would you be in a website like this?
7. What kinds of questions do you have about this site?
8. Can you think of other sites that might be comparable? What are they? What do you think of them?
9. What search terms would you use to find this website?
10. Do you expect that you would create a user login for this site?
11. If so, what do you think the user login would be used for? What would you like it to be used for?
12. Would having a user login in change what you would do on the site? What would be advantages and disadvantages?

4. Review of FIR data	15 minutes; 60 total
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Let's talk about each of the types of data that will be available on this website.

MODERATOR TO PASS OUT A PIECE OF PAPER WITH DESCRIPTION, THEN ASK QUESTIONS FOR EACH TYPE OF DATA.

HAVE SOME EXAMPLES OF THE DATA AVAILABLE

Accounting data – government wide financial reports monitoring the government's monetary assets and liabilities

Debt collection – Information on debts to the government such as federal student loans, mortgage loans, small business loans, and so on.

Receipts (Collections) – federal revenues such as individual and corporate income tax deposits, customs duties, fees for government services, fines, and loan repayments.

Government payments – payments to individuals and businesses on behalf of federal agencies such as benefit payments paid by the Social Security Administration or the Department of Veterans Affairs, federal income tax refund payments, or payments to businesses for goods and services provided to the federal government.

1. Is this the type of information you would be interested in now? What would you use it for?
2. What uses would you have for the data in the future?
3. What level of detail do you need in the data? Example: if a bridge costs \$800,000 you could see the cost listed as \$800,000 rather than 2 payments of \$400k each. Describe the level of granularity you would like to see.
4. In what ways would you like to be able to access this data?
5. What formats would you like to access the data in (Excel, pdf, APIs, downloadable files, others)?
6. Which type of data are you most interested in? **[WRITE EACH PARTICIPANT'S PRIORITY ON EASEL]**
7. What other types of data or sources would you use with the data you could pull from this site?

5. Evaluation of FIR system	25 minutes; 85 total
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[SHOW FIR PORTAL WITH LIVE DEMO OR SCREENSHOTS]

MODERATOR TO READ: This version or release of the website contains just a small amount of the information that will be available on the website in the future. When it is finished being built it will contain more breadth and depth of data than what we'll be seeing here today and it will be somewhat similar to these other websites.

[SHOW OTHER WEBSITES WITH LIVE DEMO OR SCREENSHOTS SUCH AS:

Fiscal Services: www.fiscal.treasury.gov

US Gov. Open Data: www.data.gov

Federal Spending: www.usaspending.gov

FRED: www.research.stlouisfed.org/fred2/

New York: <http://www.openbooknewyork.com/>

Texas: <http://www.texasparency.org/>

Arkansas: <http://transparency.arkansas.gov/Pages/default.aspx>

1. What are your initial impressions? (PROBE FOR BOTH POSITIVE AND NEGATIVE)

2. How would you describe the “feel” of this site? (MODERATOR TO CAPTURE LIST OF ADJECTIVES ON A BOARD)
3. What sort of reports would you expect to see? What would you **like** to see?
4. When I say the term ‘customized reports’ as we’re talking about a site like this, what do you think that means? Please describe
5. What sort of customized reports would you like to be able to create and run?
6. There are many ways to analyze and interpret data, and many different types of data sources. Sometimes we don’t always know what is contained in the data we are analyzing What would help you understand the type of data that you are using from a site like this?
7. How much education do you think you’d need about the data in terms of what it means? How would you like to receive that information?
8. How would you want to analyze the data? What types of tools would you look for on the website?
9. Do you want to see the data itself or have an explanation that tells a story about what you’re seeing?
10. What do you think about these examples? [SHOW EXAMPLES OF CHARTS, GRAPHS, MAPS, ETC. FROM OTHER WEBSITES] GATHER FEEDBACK
11. Here are some other types of comparisons. [SHOW EXAMPLES OF TIME, GEOGRAPHY, CATEGORIES, CROSS-SYSTEM COMPARISONS] GATHER FEEDBACK
12. Are there any other websites that have functionality you would like to see here?
13. Do you expect to see tutorials? What do you think about tutorials – do you use them?
14. What is the value of this data to you?
15. What if you had to quantify the value of the data? How much would you say it’s worth?

6. Communicating about FIR**10 minutes; 95 total**

Now let's talk a bit about how you would like to hear and learn about this website.

- a. This is a new site that is being created. How would you like to hear about it?
- b. What other ways do you recommend promoting the website so people are aware that it is available?
- c. Do you receive email or other updates from websites that you use frequently? What gets your attention?
- d. What type of communications would you want to receive from a website like this? For instance RSS, email blasts, Twitter, Facebook or other social media.
- e. How do you prefer to receive communications about portals and sites like this in general?
- f. How frequently would you want to receive some type of communication?
- g. Would you like to be informed when new information and data is added to the site?
- h. How will you use the communications? For personal use only or share with others? IF SHARING WITH OTHERS: How would you share it?

7. Wrap up**5 minutes; 110 total**

We've been discussing a number of ideas related to this website. Based on everything you've seen tonight, what is your overall reaction to it?

- a. Do you have any additional comments or suggestions?
- b. Thank and release