

## Summary of FIR Public Portal

### In-Depth Qualitative Research

February 28, 2014

This memo provides an overview of the FIR Public Portal Research. This overview document is meant to accompany two documents for OMB approval: one screening questionnaire that will be used to identify and recruit the research participants, and a discussion guide that will be used during the qualitative discussions. We will conduct the qualitative research with individuals who have an interest in using the types of federal financial information that will be available via the FIR public portal.

Purpose. The purpose of this project is to obtain public input on the functionality, design and outreach plans for the FIR public portal.

Approach. This research will be conducted through six in-person focus groups with a cross-section of potential users, based on level of interest and potential users plus an online bulletin board session with heavier users of federal financial data who are geographically dispersed across the country.

Artemis has developed a screening protocol designed to recruit potential users who represent a cross-section of the population in terms of their level of interest and potential use of the data as well as gender, race/ethnicity, education, and employment status.

The screening protocol will be used to recruit at least 7 potential FIR public portal users for the focus groups to assure at least 4-5 participants in each session (minimum of 24 total participants); and at least 15-18 heavy users of federal financial information to ensure a minimum of 12 bulletin board participants.

The in-person focus group sessions will each last approximately 120 minutes and the bulletin board session will ask participants to spend up to one hour. A professional moderator will conduct the focus group sessions and moderate the bulletin board session. Burden estimate: the total number of participants will range between 36 and 48 participants. Total burden time will be between 78 and 102 hours (assuming 2.5 hours per focus group participant for screening and group participation and 1.5 hours for bulletin board participants for screening and group participation).

Members of the Treasury and the Federal Reserve team will be able to attend the focus group sessions in person at the research facility or view them remotely via computer. These sessions will be recorded and available for viewing after the session. Observation and transcripts for the bulletin board session also will be available. Artemis will prepare a full report of findings and present to the team.

Question focus. This round of research builds on the Audience Definition research conducted in January. In this round the focus shifts toward a more in-depth exploration of the current use of data from other government websites, the FIR public portal desired functionality, probing wants and needs for specific types of information, data exploration

and reporting capabilities, and potential outreach methods. Respondents will view some pages of the website and examples from other websites to stimulate discussion of capabilities. For details, see the discussion guide that accompanies this document.

Incentives. The following rationale is used in determining the incentives proposed to pay to the moderate and higher interest potential users of the FIR public portal. The rates are based on the prevailing rates for the location:

This is a piece of market research designed to provide input to the FIR public portal development based on the potential level of use. There are two target audiences: members of the general public with moderate interest and members with a higher level of interest that will frequently be based on their occupation and involve those in academia, economists, analysts, etc with high level of interest in government payments, receipts, debt collection, and accounting data.

In the case of focus groups, there is an established pattern of costing based on collective recruiting experience. The research industry does not typically conduct feasibility studies with individual market research projects to determine optimal incentive rates. Such market research projects typically don't have the budget for research-on-research testing. But this is a market-driven process. The government contractor, Artemis Strategy Group, provides two pieces of information guiding this: their experience in this type of research studies and the bid/ask experience in the marketplace.

- Artemis Strategy Group is a mainstream research organization whose leaders each have 25 years+ experience conducting these kinds of qualitative research studies, for private and public sector clients.
- The market provides the primary basis for pricing. In major U.S. cities there are typically a handful of organizations that provide the recruiting services for focus groups. They respond to our specifications and bid against each other to conduct this kind of work. They are highly competitive with each other, and we negotiate with them to find the best deal. We attach here a spreadsheet showing the proposed incentive rates for these audiences. Note that some of the companies specified different incentive levels for the moderate and higher interest groups, while others proposed one incentive amount for both groups. These organizations represent the primary entities in these cities doing this kind of work.

Referring to the incentives spreadsheet, the proposed honorarium is in line (or below) the bids we have received based on the size of the market. If we are unable to offer this level of incentive, the bidders may not accept the work or they may reduce their commitment to fulfilling the task. We can negotiate with them to some extent, but these incentive rates are widely accepted industry norms for this kind of work.

Analysis. Analysis will be primarily diagnostic, directed heavily at understanding current behaviors in relation to sites such as FIR, including how they use the information and their unmet needs; reactions to the types of information that will be available on FIR and current and future relevancy for the target audience; reactions to the look and feel of the current site, perceptions of ease of use and application to needs; and cataloging potential uses of the data for the specific audiences included in the study identifying the factors and approaches with the greatest appeal, relevance and appropriateness for the cross-section of potential users. A secondary set of findings will be directed at outreach methods. The research team will interpret and present the results to the full Research Workgroup, and will discuss recommendations and implications.

Timing.

February – OMB Review

February/March – Development of materials to be tested and focus group/interview protocol.

March – Finalization of materials; recruiting of focus group/bulletin board participants.

March – Conduct focus groups and bulletin board.

April – Analyze and report on findings.