Pilot Evaluation of Financial Empowerment Training (FET) Toolkit: Protocol for Telephone Focus Group with Cohort Trainers

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Introduction (5 minutes)

My name is ___________ and I work for a company called ICF International. We are the research company that has been hired by the Consumer Financial Protection Bureau, or CFPB, to help develop and test the toolkit that you have all been using. Also on the phone are _______________ from ICF and _________________ from the CFPB.

Thank you all very much for agreeing to be part of this conversation today. On this call we are interested in hearing anything that you have to say, but we are primarily going to talk about three things. First, we would like to hear more about the experiences that you all have had conducting workshops on the FET toolkit with case managers in your organizations. Second, we would like to hear any feedback that you have about the toolkit itself, based on those workshops. Finally, we will spend a little time talking about the initial web-based training that you all received, and how that could be improved. This focus group will take no more than 60 minutes.

I'd like to tell you a few last things before we begin.

- We will be taping this discussion, to make sure we don't miss anything that you say. These recordings may be used by ICF and the CFPB to make sure that our notes are complete, but will not be shared with anyone else.
- In any reports that we write on this pilot evaluation of the toolkit, we will not use your names and will not connect any of your comments specifically to you or your organization.

Does anyone have any questions before we begin?

The first thing I would like to do is to have everyone to introduce themselves, as well as state the organization for whom they work.

Section I: Experience Conducting FET Toolkit Workshops (20 minutes)

1. What were the reactions of the case managers that you trained to the FET toolkit?
    a. To what extent did they seem interested in the tools and resources?
    b. To what extent did they seem to believe that the toolkit would be helpful to them and their clients?

2. Was there anything about the reactions of the case managers to the toolkit that surprised you?

3. Was there anything that went particularly well during the workshops you conducted on the FET toolkit?

4. Was there anything that did not go well during the workshops you conducted on the FET toolkit?

5. Is there anything that you would do differently if you were going to conduct additional workshops on the FET toolkit? What and why?

Section II: Cohort Members' Feedback on the Toolkit (25 minutes)

6. Based on your interactions with the case managers during the training, what aspects of the toolkit do you think they will find <u>most</u> useful?

7. Based on your interactions with the case managers during the training, what aspects of the toolkit do you think they will find <u>least</u> useful?

8. Thinking about the goal of equipping case managers to integrate financial empowerment into their work, what suggestions do you have for how the toolkit could be improved?
   a. Are there any topics that are not included in the toolkit that should be added?
   b. Are there any specific kinds of tools or resources that should be added?

9. What kinds of case managers do you think will be most likely to use the toolkit effectively with their clients? What kinds of case managers do you think will struggle to make use of the toolkit?
   a. How, if at all, would case managers' ability to effectively use the toolkit depend on:
      - Their own understanding of financial topics?
      - The kind of organization for whom they work?
      - The types of interactions they have with clients (e.g., in-person vs. phone)?
      - The demographic characteristics of their clients?

10. Obviously, the information and resources in the FET toolkit are primarily intended to help case managers improve the financial empowerment of their clients. However, the CFPB is also interested in knowing whether the toolkit might have an impact on the case managers themselves. How, if at all, do you think the toolkit might impact:
    - Case managers' own understanding of financial topics?

- Case managers' comfort level having discussions with their clients about financial issues?
- Case managers' confidence in being able to address their clients' needs?

Section III: Cohort Members' Feedback on Initial Web-Based Training (10 minutes)

After you received your first training about the FET toolkit, we asked you to complete a survey providing feedback on that training. However, we'd be interested in getting your perspective on that training now that you have had an opportunity to conduct your own workshops on the toolkit.

11. Were there any ways in which you were not fully prepared to conduct workshops with case managers?
    a. Did case managers ask you any questions or bring up any issues that weren't addressed in the web-based training? What were they?
12. Were there any ways in which that web-based training could have prepared you better to conduct your workshops with case managers? If so, how?
13. If you were the CFPB and were planning to train another group of people like yourselves, what would you do differently next time?

Closing

On behalf of both ICF and the CFPB, thank you all very much for participating in this focus group. The information you have provided will be used to inform changes that are made to both the FET toolkit and to the web-based training materials that are used to prepare trainers like yourselves. Good night.