

**DISCUSSION GUIDE**  
**FINANCIAL AID TOOLKIT ONLINE FOCUS GROUPS**  
*3/12~3-13, 2014*  
**FINAL VERSION**

---

**INTRODUCTION AND GROUND RULES**

Hello, my name is Dave Glantz and I work for Market Connections. I'm the moderator for today's discussion. We'll be online for about 90 minutes, on behalf of the Department of Education's office of Federal Student Aid, to chat about your impressions of an FSA website, along with some new features that may potentially help you support your outreach to students. I am here to get your ideas, thoughts, and opinions on a range of issues related to this topic.

This session is anonymous and will be used only for research purposes. We have no stake in the outcome – my job is to write a report based on your comments. Our report will not identify individuals by name.

A couple things to keep in mind are: Don't feel you have to tell me what others think, or what you think we want to hear – tell me what you personally think and feel. In that spirit, we are not here to try and come to any consensus, so if you all have different ideas and opinions, that is very important for me to know. In this type of discussion there are no wrong answers – just different opinions

Also, in the interest of helping the pace of our conversation here are a few more tips:

- Be sure you are in an area with limited distractions. Having your full attention with the group will help us move along as quickly as possible.
- Don't worry about typos or misspellings
- You can all type at once. There's no need to wait for others to finish typing.
- I will be sure to go slow enough so that you all have time to type and to read others' comments. And if you have something to add to someone else's comment, please feel free to do so.
- I need to hear from everyone during the course of the conversation. Your opinions are important to me, but don't feel like you have to answer every question.
- There may be times where I may have to interrupt you or cut you off. Please understand that I'm not being rude. It's just that I have many questions to cover and want to keep us on track.

Finally, at various points in our conversation I'll be posting a few web pages for you to evaluate. Each of these will open in a separate window. Please take a second to turn off your pop-up blocker (if you have it on) so that you can see the images when I post them. Is everyone okay with that?

**0:05**

## II. WARM-UP, INFORMATION NEEDS

Start by: 0:05

elapsed time: 0:30

Finish by: 0:35

I would first like to have everyone introduce themselves. Please tell me...

- Your first name (or what you like to be called)
- Job Title (for Partners: your role)
- The most rewarding thing about providing guidance to/advising students

- In your role as a counselor/advisor/mentor to students (of any age) on college financing and other college/career related topics, what types of information do you look for to be as effective as possible? (**PROBE:** What are your needs?)

- Are some types of information particularly difficult to get?

- Where have you looked for this information? (**PROBE:** online and offline sources)

- Which sources are more reliable than others?
- Which sources are more up to date than others?
- Are there any sources you would avoid? (**PROBE:** What makes you say that?)

On the assumption that you are interacting with students (of any age) and possibly with parents on a wide range of financial aid and informational issues related to entering college, I want to ask you a few questions about each of these audiences. Let's start with students.

- What are your main objectives when it comes to advising/mentoring/working with students on financial aid, and other related topics? (**PROBE:** what is most critical for students to understand, e.g., a general understanding of financial aid, federal student aid in particular, other (specify))
- What challenges tend to stand in the way of meeting these objectives? (**PROBE:** students' lack of information, or misinformation)
- **[TIME PERMITTING, ASK]** Now let's turn to parents. What are your main objectives when it comes to advising parents of students on college financial aid? (**PROBE:** what is most critical for parents to understand?)
- **[TIME PERMITTING, ASK]** What challenges tend to stand in the way of meeting these objectives? (**PROBE:** parents' lack of information, or misinformation)

0:35

III. EVALUATING THE FINANCIAL AID TOOLKIT WEBSITE

Start by: 0:35

elapsed time: 0:55

Finish by: 1:30

- FSA has launched a “Financial Aid Toolkit”. Who is aware of this site?
  - **[TIME PERMITTING]** Briefly, what is your impression of the name, “Financial Aid Toolkit”?

For the next 7-8 minutes I’m going to give you the chance to scroll through the Financial Aid Toolkit website, starting with the homepage.

I’m all for you asking for more details about what you’re viewing, if you need additional information. In terms of sharing your opinion or any likes or dislikes about what you see, please hold off on that for the moment. But when you’re finished reviewing the site, I’ll want you to do two things. Type the grade you would give this site from “A” to “F” (“A” means it’s highly appealing to you and “F” means it’s not at all appealing to you). Please also type the first thing you said to yourself when looking at this website.

Once you’ve given your grade and written your comments, then we’ll open up the floor so you can tell us the reasons behind your grades. Sound okay? Okay, let’s look at the website.

**[POST the Financial Aid Toolkit homepage. ALLOW 7-8 MINUTES FOR PARTICIPANT REVIEW, THEN ASK FOR THEIR GRADE & FIRST IMPRESSION]**

- What is the reason for your grade?
  - IF A: What do you especially like or find valuable about the site?
  - IF B-F: What needs to change or occur to bring your grade to an A?

1:00

**ASK IF TIME PERMITTING** To what extent, if any, do you consider the site to be a credible source of information? (**PROBE:** What makes you say that?)

- How relevant is the site’s information to your goals? (**PROBE:** What makes you say that?)
- Now that you’ve reviewed the site, I want to ask what you feel is the main purpose of this site? (**PROBE:** a place for information/advice; other (SPECIFY))
- Is this the type of site you would return to from time to time, or do you think that, realistically, you would go to it only once? (**PROBE:** What makes you say that?)
- When surfing through the site just now, where did you go, and for what reasons?

- Which elements of the site are you most likely to use or refer to on an ongoing basis?
- Is there any content or topic area or tool that appears to be missing, or not readily available on the site?
- **ASK IF TIME PERMITTING:** What factors or conditions are likely to encourage you to use the website?
- **ASK IF TIME PERMITTING:** What factors or conditions are likely to discourage you from using the website?
- **ASK IF TIME PERMITTING:** What, if any, enhancements or features would you recommend for the site?
- **[POST SPECIFIC URL]** Briefly, I want to direct you to the Filter Search Tool. It appears on the page with the subheading “Search for Tools and Resources To Help You Or Your Students Learn About Financial Aid For College”. How useful is this filtering tool to you?
  - What makes you say that?
  - Please take a look at the dropdown box on the right-hand side—the one that says “During” above it, and “Time of Year” in the dropdown box itself. Would you be more likely to use that dropdown, or would you prefer to just see all resources and pick the ones you think are relevant for your immediate needs?
- The site itself is formatted so that its layout adapts from PC to tablet to smartphone. With that understanding, how likely are you to access this site on a tablet or smartphone? (**PROBE:** What makes you say that?)
- How likely are you to recommend the site to your colleagues and peers? (**PROBE:** What makes you say that?)
- What additional advice would you like to give to FSA to ensure the website does the best job possible to meet your needs?

*Those are all the questions I have for you. Thanks for your input!*

**1:30**