

NATIONAL CENTER FOR EDUCATION STATISTICS (NCES)

Attachments I-IV

***Communication Materials, Eligibility Screener, Consent Form,
and Focus Group Protocol***

***2016/20 Baccalaureate and Beyond Longitudinal Study
(B&B:16/20) Tryouts and Focus Groups***

OMB# 1850-0803 v.242

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Attachments:

- Attachment I - Recruitment Procedures and Materials
- Attachment II - Eligibility Screening Questions
- Attachment III - Consent to Participate in Research
- Attachment IV - Focus Group Protocol

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Attachment I. Recruitment Procedures and Materials

Identification of Respondents

EurekaFacts will locate potential participants through multiple outreach/contact methods and resources, such as cold-calling from directory listings, advertisements within organizations and education institutions, referrals and snowball sampling, and social media posts. In response to these outreach/contact methods and resources, potential participants will inform EurekaFacts of their interest to participate in the study by calling or e-mailing the EurekaFacts contact information found in the outreach/contact materials or following a link to the self-administered screener. EurekaFacts will review the responses to the self-administered screeners of potential respondents to identify eligible participants. Potential respondents will then be notified if they were selected to participate in either the remote web survey tryout or in-person tryout and focus group.

Sample Recruitment Advertisements

Advertisements will target individuals qualified for B&B:16/20, describing briefly the purpose of the testing and the opportunity for participants to contribute to the development of a survey. The advertisements will identify the need for 2013-2014 college graduates, the time commitment of the survey or focus group, and the incentive amount offered for participation.

Sample advertisements using a variety of methods are presented below. The main method will include direct e-mails/ letters sent to individuals and organizations with members who may qualify. The e-mail or letter will also include a flyer and an FAQ page. In addition, social media post language has been included for online advertisements. As part of the recruitment process, recruitment scripts, confirmation phone scripts and e-mails, survey invitation e-mails, and thank you e-mails may be used and are provided in this document.

Initial Contact Recruitment E-mail/Letter to Individuals

IF SENT AS E-MAIL-Subject: Paid Research Study Opportunity

<DATE>

Dear <NAME>,

EurekaFacts is administering an important study on behalf of the U.S. Department of Education's National Center for Education Statistics (NCES), and we **need your help.**

We are looking for <teachers OR individuals> who have completed their bachelor's degree between **May 1, 2013 and December 31, 2014** to participate in a voluntary [<IF POTENTIAL WEB SURVEY RESPONDENT> self-administered web survey <IF POTENTIAL FOCUS GROUP PARTICIPANT> 90-minute focus group] to provide feedback on the 2016/20 Baccalaureate and Beyond Longitudinal Study (B&B:16/20).

<IF POTENTIAL WEB SURVEY RESPONDENT> The study requires you to take a self-administered web survey through a computer, tablet, or smart phone and will take about **20 minutes** to complete. After submitting the web survey, you will receive a **\$30** e-gift card from a major credit card company.

<IF POTENTIAL FOCUS GROUP PARTICIPANT> The focus groups will take place in Rockville, MD where you will first answer survey questions and then participate in a group discussion about the survey and sample contacting materials. You will receive a **\$90 gift card** from a major credit card company at the end of the session as a 'thank you' for your time and effort.

By participating in this study, you will improve the questionnaire, so it is clear and can be easily understood and answered by thousands of other educators and professionals across the country!

[<IF E-MAILED> If you are interested in participating, please click on the following link and answer a few screening questions:

<INSERT LINK TO INTAKE/SCREENING FORM>]

I have included a flyer and a FAQ page with additional information about the study. Please call <CONTACT PHONE> or e-mail <CONTACT E-MAIL> with any questions regarding this project.

We look forward to speaking with you soon!

Sincerely,

<CONTACT NAME>

<JOB TITLE>

EurekaFacts, LLC <CONTACT PHONE>

ATTACHED: Flyer and Frequently Asked Questions (FAQ)

Recruitment E-mail/Letter to Organizations

IF SENT AS E-MAIL-Subject: Paid Research Study Opportunity

<DATE>

Dear <NAME>,

EurekaFacts, a research company based in Rockville, MD, is administering an important study on behalf of the U.S. Department of Education's National Center for Education Statistics (NCES). [<IF SCHOOL OR EDUCATION ORGANIZATION> Because of your role in the educational community <IF OTHER ORGANIZATION> Because your organization plays an active role in the community], we **need your help.**]

We are looking for [<IF SCHOOL OR EDUCATION ORGANIZATION> teachers <IF OTHER ORGANIZATION> employed individuals] who have completed their bachelor's degree between **May 1, 2013 and December 31, 2014** to participate in a voluntary research interview to provide feedback for the 2016/20 Baccalaureate and Beyond Longitudinal Study (B&B:16/20).

[<IF POTENTIAL WEB SURVEY RESPONDENT> The survey will take about 20 minutes to complete and can be done at a time that is convenient for the participant. Participants will be e-mailed a **\$30 e-gift card** from a major credit card company after they complete the survey as a 'thank you' for their time and effort.]

[<IF POTENTIAL FOCUS GROUP PARTICIPANT>The focus group session will last no more than 90 minutes. During the session, participants will be asked to answer questions about the impact of education on their career and lives. Some topics may include student debt, repayment, and employment experiences. [<IF SCHOOL OR EDUCATION ORGANIZATION> Additionally, the survey will ask follow-up questions to understand teachers' overall experience completing the survey.]

The focus group session will be audio and video recorded. NCES is required to follow strict procedures to protect personal information in the collection, reporting, and publication of data.¹

Participants will receive a **\$90 gift card** from a major credit card company at the end of the session as a 'thank you' for their time and effort.]

You can play a key role in making sure that [<IF SCHOOL OR EDUCATION ORGANIZATION> the voice of the education community <IF OTHER ORGANIZATION> a variety of voices] will be heard to improve the questionnaire used in this study, so it is clear and can be easily understood and answered by thousands of educators and professionals across the country.

We would like to ask for your assistance in letting your [<IF SCHOOL OR EDUCATION ORGANIZATION> faculty] [<IF EDUCATION ORGANIZATION OR OTHER ORGANIZATION> members, and/or clients] know how they can be involved in this important study.] We have included a flyer with a brief description of our study in the hope that you can post it for everyone to see. I have also included a FAQ page with additional information about the study.

We appreciate your consideration of this request and invite you to please call <CONTACT PHONE> or e-mail <CONTACT E-MAIL> so we can answer any questions you may have.

We look forward to speaking with you soon!

Sincerely,

<CONTACT NAME>

<JOB TITLE>

EurekaFacts, LLC <CONTACT PHONE>

ATTACHED: Flyer and Frequently Asked Questions (FAQ)

¹ All of the information provided may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151).

Recruitment Phone Script for Potential Participants/Respondents

(Script when calling potential participants from a compiled list)

Good morning/afternoon/evening. Is this the <LAST NAME FROM CALL LIST> household? My name is <CALLER NAME> and I am calling from EurekaFacts, a Maryland research company. Our company is administering an important research study on behalf of the National Center for Education Statistics (NCES), which is part of the U.S. Department of Education and we need your help.

We are recruiting individuals to participate in a voluntary research survey [<IF POTENTIAL FOCUS GROUP PARTICIPANT>, followed by a focus group to provide feedback about survey questions and contacting materials]. If you qualify and participate in the study, you will [<IF POTENTIAL FOCUS GROUP PARTICIPANT> receive a \$90 gift card from a major credit card company at the end of the session <IF POTENTIAL WEB SURVEY RESPONDENT> be e-mailed a \$30 e-gift card from a major credit card company at the end of the survey] as a 'thank you.'

I'd like to tell you a little bit more about the study, but first, if now is a good time, can I ask you a few questions? (YES or NO and call back later)

[IF YES, ADMINISTER ELIGIBILITY SCREENING QUESTIONS 1 -3 (see Attachment II)]

Thank you. [<IF POTENTIAL FOCUS GROUP PARTICIPANT> The focus group will be split into two main parts: a survey and a group discussion.] During the survey, you will be asked to answer questions about the impact of your education on your career and life. Some topics may include student debt, repayment, and employment experiences. Additionally, the survey will ask follow-up questions to understand your experience completing the survey. These questions ask you to evaluate the difficulty of the question, your confidence in your answers, your understanding of the question, and the layout and usability of the survey on the device you take it on.

[<IF POTENTIAL FOCUS GROUP PARTICIPANT> Then, EurekaFacts will facilitate a group discussion with about 10 people. We will ask questions about your overall survey experience and sample contacting materials. The focus group session will be audio and video recorded.] Your participation and opinions will help us improve the questionnaire, so it is clear and can be easily understood and answered by thousands of other individuals across the country.

[<IF POTENTIAL FOCUS GROUP PARTICIPANT> The entire focus group session will last no more than 90 minutes and can be scheduled at your convenience. The interviews will be administered at the EurekaFacts office in Rockville, MD.

<IF POTENTIAL WEB SURVEY RESPONDENT> The survey will take about 20 minutes to complete and can be done at a time of your convenience.]

All of the information you provide may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151).

Are you interested in participating in this research study?

*If **NO**: Thank you for your time. Have a good <day/evening>.*

*If **YES**: Great, thank you very much. To ensure that we interview a broad mix of individuals, I have a few brief screening questions to ask you. It should only take about 5 minutes of your time.*

[RESUME ADMINISTERING ELIGIBILITY SCREENING QUESTIONS (see Attachment II)]

Web Survey Social Media Post

[CONTENT OF POST]

EurekaFacts, a Maryland research company, is looking for people who graduated between May 2013 and December 2014 to complete an online self-administered survey. Your feedback on the survey will help improve it for thousands of others!

CLICK ON THE LINK BELOW TO SIGN UP!

[CONTENT OF SHARED IMAGE & LINK]

[Image will be linked to study's intake page hosted on the EurekaFacts website]

PAID RESEARCH STUDY

\$XX GIFT CARD

**Did you earn your bachelor' degree
between May 2013 & December 2014?
If so, we need your help!**

You can participate in an important <survey OR survey and focus group> for the U.S. Department of Education's National Center for Education Statistics. We would like to hear about your postbaccalaureate experiences, such as employment, student debt, and repayment.

[<IF POTENTIAL WEB SURVEY RESPONDENT> If you will complete a 20-minute online survey, <IF POTENTIAL FOCUS GROUP PARTICIPANT> If you come to our Rockville office to complete a short online survey and participate in a group discussion about the survey,] you will get a <INCENTIVE AMOUNT> gift card for your input.

**For more information or to register, please call us at <PHONE NUMBER>, or go to the website below:
<LINK>**



About EurekaFacts

We are an organization dedicated to conducting research that positively impacts our communities. Our mission is to support and empower organizations working towards a better future.

For more information, please go to: www.EurekaFacts.com



ISO Certified to International Quality Standard 20252 market, public opinion and social research

2016/20 Baccalaureate and Beyond Longitudinal Study

The purpose of this study is to test, evaluate, and provide feedback on select survey questions. We are looking for individuals who recently received their bachelor's degree [**<IF FOCUS GROUP>** to come to our Rockville office to participate in a focus group].

You will complete a self-administered survey, which will take about **<TIME>** minutes. [**<IF FOCUS GROUP>**Then you will participate in an hour-long focus group discussion about your overall survey experience.]

You will receive a \$**<INCENTIVE AMOUNT>** gift card from a major credit card company at the end as a thank you.

Your feedback will improve the survey, so it is clear and can be easily understood and answered by thousands of others across the country.

The information you provide will be used only for research purposes. You will be assigned a research ID number and your responses will not be linked to your name.

Please contact us today if you are interested in participating.

For more information or to register, please call us at **<NUMBER>, or go to the website below:**

<LINK>

OMB Control No.:1850-

Frequently Asked Questions (FAQs)

1. What is this study about?

On behalf of the U.S. Department of Education's National Center for Education Statistics (NCES), EurekaFacts, a research company based in Rockville, MD, is looking for recent graduates to [<IF FOCUS GROUP> come to our office and] complete a self-administered survey [<IF FOCUS GROUP> and participate in a focus group]. These are select survey questions from the 2016/20 Baccalaureate and Beyond Longitudinal Study (B&B:16/20). Your feedback about the survey [<IF FOCUS GROUP> and contribution during the group discussion] will help NCES improve the survey, so it is clear and can be easily understood and answered by thousands of other individuals across the country.

2. IF FOCUS GROUP:

Where will the research interview take place?

You will come to the EurekaFacts office at 51 Monroe Street, PE 10, Rockville, MD 20850. Our office is conveniently located across the pedestrian bridge connected to the Red Line Rockville Metro Station. There is also ample validated parking in our building.

IF WEB SURVEY:

How do I get access to the web survey?

If eligible, you will be sent an e-mail with a link to the survey landing page and a unique passcode to log in to the survey. You will be prompted to provide an electronic signature to acknowledge your consent to participate. Once you've signed the consent, you will begin the survey.

3. What will happen during the <research interview/survey>?

During the survey, you will be asked to answer questions about the impact of your education on your career and life. Some topics may include student debt, repayment, and employment experiences. Additionally, the survey will ask follow-up questions to understand your experience completing the survey. These questions ask you to evaluate the difficulty of the question, your confidence in your answers, and your understanding of the questions.

[<IF FOCUS GROUP> During the focus group, EurekaFacts will facilitate a group discussion with about 10 people. We will ask open-ended questions about your overall survey experience and about specific questions. The focus group session will be audio and video recorded.]

4. What kind of device <will/can> I take the survey on?

[<IF FOCUS GROUP> You will be taking the survey on a tablet computer provided by EurekaFacts.]

[<IF WEB SURVEY> You can take the survey on any of these three platforms: computer, tablet, or smartphone. We are interested in how participants interact with the survey on all devices.]

5. How long will the whole session last?

[<IF FOCUS GROUP> We anticipate the entire session to last 90 minutes. The survey will take about 30 minutes to complete. The group discussion about the survey and sample contacting materials will take about 1 hour.]

[<IF WEB SURVEY> The survey will take about 20 minutes to complete.]

6. Will information be kept confidential?

You will be assigned a unique identifier (ID) and your name will not be linked to your answers. All of the information provided may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151). [<IF FOCUS GROUP> Audio and video of the session will be recorded only for analysis, and all personally identifying information will be destroyed after <LENGTH OF TIME>.]

7. Will the results go to my place of work?

Your answers will not be disclosed to your company or place of work and will not be linked to any personally identifiable information.

8. Is there an incentive for participating?

Yes. You will receive a [<IF FOCUS GROUP> \$90 gift card <IF WEB SURVEY>\$30 e-gift card] from a major credit card company.

[<IF WEB SURVEY> Once you complete the survey, you will be asked to verify your e-mail address. In about 1 week, you will receive an e-mail, complete with all instructions about using the electronic incentive. You can use it to shop online or request to be sent a traditional plastic gift card.]

9. What are the possible risks of being in the study?

There are no known risks to participating in this voluntary study.

10. Who can I contact with questions or for further information?

If you have any questions about the study, you can call <NAME>, the <TITLE> at <CONTACT PHONE>. If you have questions about your rights as a study participant, you can call the EurekaFacts' Office of Research Protection at <PHONE NUMBER> (a toll-free number).

11. Can participation end early?

Participation in this study is completely voluntary. You have the right to refuse to answer particular questions. You may elect to stop answering the survey questions at any time.

Focus Group Confirmation E-mail for In-person Participants

Subject: Confirmation for NCES Research Interview Study

<DATE>

Dear <NAME>:

Thank you for agreeing to participate in this voluntary research interview to provide feedback on survey questions and sample contacting materials for the National Center for Education Statistics (NCES). The session will last about 90 minutes.

This is confirmation that you are scheduled at the following location, date, and time:

LOCATION: EUREKAFACTS, LLC
51 Monroe Street, PE 10
Rockville, MD 20850

DATE: <Day of Week>, <Month> <Day>, <Year>

TIME: XX:XX AM/PM <TIMEZONE>

GIFT CARD: You will receive a **\$90 gift card** from a major credit card company at the conclusion of the session for your time and effort.

PLEASE READ THE FOLLOWING INSTRUCTIONS:

Please bring the following:

- Your valid picture ID – this is required for participation.
- Signed consent form (attached); we will have copies available, if needed.
- If you use eyeglasses for reading or watching TV, you should wear them during the study session.

We look forward to speaking with you. If you have any questions or concerns, please contact:

<CONTACT NAME>

EurekaFacts, LLC

<CONTACT INFORMATION >

ATTACHED: Consent Form

Focus Group Confirmation Phone Script

(Parenthetical text is provided for reference and does not need to be read aloud)

Good morning/afternoon/evening. May I please speak to <NAME> about an interview research session at EurekaFacts to test and provide feedback for survey questions for the National Center for Education Statistics (NCES)?

Good morning/afternoon/evening. My name is <NAME> and I'm calling from EurekaFacts about your scheduled interview session that we are carrying out on behalf of the National Center for Education Statistics (NCES), part of the U.S. Department of Education. We are pleased that you have agreed to participate in this study and help us improve our questionnaire and sample contacting materials. This is a reminder that we have scheduled your session for <TIME> on <DATE>.

The session will take place at our office at 51 Monroe Street, PE10, Rockville, MD 20850 and will last no more than 90 minutes.

During the focus group, you will be asked to answer questions about the impact of your education on your career and life. The moderator will ask open-ended questions about your overall survey experience, specific survey questions, and sample contacting materials. All of the information you provide may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151).

As soon as you complete the session, you will receive a \$90 gift card from a major credit card company as a thank you for participating.

Do you have any questions at this time?

<Answer any questions.>

Again, your session is scheduled at <TIME> on <DATE>. Please arrive 15 minutes before your scheduled time to check in. If you have any questions before then, please call <PHONE NUMBER>.

Thank you again for agreeing to be part of this very important study.

Web Survey Invitation (Initial and Reminder) to Participate for Eligible Respondents

IF SENT AS E-MAIL - Subject: Paid Research Study Opportunity

<DATE>

Dear <NAME>,

[<IF REMINDER E-MAIL> Recently, we invited you to participate in a self-administered web survey to learn about the impact of your education on your career and life and we'd still like to hear from you!]

EurekaFacts, a research company based in Rockville, MD, is administering an important study on behalf of the U.S. Department of Education's National Center for Education Statistics (NCES).

You have been selected at random from a list of eligible respondents to participate in the study by completing an online survey. Your participation will help NCES improve the questionnaire used in this study so that it is clear and easily understood and can be successfully answered by thousands of other individuals across the country.

The information you provide will be used only for research purposes. You will be assigned a unique research ID number and your responses will not be linked to your name.

The study requires you to take a self-administered web survey through a computer, tablet, or smart phone and will take about **20 minutes** to complete. After submitting the web survey, you will receive a **\$30 e-gift card** from a major credit card company. Your electronic consent and signature will be needed prior to participation.

**If you are interested in participating in this study,
please go to the website <SURVEY LINK>
and enter your unique ID: [abc123]**

I have included a flyer and a FAQ page with additional information about the study. Please call <CONTACT PHONE> or e-mail <CONTACT E-MAIL> with any questions regarding this project.

Thank you for your willingness to participate in this important study.

Sincerely,

<CONTACT NAME>

<JOB TITLE>

EurekaFacts, LLC

<CONTACT PHONE>

ATTACHED: Flyer and Frequently Asked Questions (FAQ)

Thank You E-mail/Letter to Participants/Respondents

IF SENT AS E-MAIL - Subject: Thank you - NCES Survey Interview Study

<DATE>

Dear <Name>,

On behalf of the National Center for Education Statistics (NCES), part of the U.S. Department of Education, EurekaFacts would like to thank you for participating in the 2016/20 Baccalaureate and Beyond Longitudinal Study (B&B:16/20) Pretest.

Your participation provided valuable feedback about the survey questions [<IF FOCUS GROUP PARTICIPANT> and sample contacting materials]. Your open, candid, and insightful comments were very helpful. Your input, combined with input from other respondents like you, is incredibly useful and informative, and is helping us develop the best possible survey questions [<IF FOCUS GROUP PARTICIPANT> and contacting materials] for NCES.

Again, thank you for your assistance.

Sincerely,

<CONTACT NAME>

<TITLE>

EurekaFacts, LLC

<CONTACT INFORMATION >

Attachment II. Eligibility Screening Questions

All initial eligibility screening will be conducted by telephone or through a self-administered online recruitment screener. The recruitment screener, a 3-5-minute online survey, will be used to determine whether individuals qualify to participate in the study to test a subset of B&B:16/20 survey items and contacting materials. Potential respondents who contact EurekaFacts via telephone or e-mail in response to the recruitment advertisements will have the choice to complete eligibility screening on the telephone with EurekaFacts or receive an e-mail containing the online recruitment screener link.

Respondents who click the screener link provided in the targeted social media ads and e-mails will go directly to the online recruitment screener. The responses to the online recruitment screener questions will determine their eligibility for the project.

If the recruitment screener determines that potential respondents are eligible, respondents selected for the web survey will receive an e-mail invitation with a link to the web survey (see web survey invitation to participate for eligible respondents in Attachment I). Eligible respondents selected to participate in a focus group will receive a confirmation e-mail and/or phone call with the date, time, and location information for the session they selected in the screener (see Attachment I for focus group confirmation e-mail and phone script).

The introduction to the eligibility screener for the telephone agents when screening is conducted over the telephone can be found in "Recruitment Phone Script" in Attachment I. The script in the beginning of the screener is the text displayed on the online version. Likewise, the language for the last three questions has two versions, dependent on whether the survey would be viewed by the participant or read to them by a EurekaFacts agent.

E-mail with Self-Screener to Interested Participants who Call EurekaFacts

IF SENT AS E-MAIL - Subject: Paid Research Study Opportunity

<DATE>

Hello <NAME>,

Thank you for your interest in our study. EurekaFacts is carrying out this study among bachelor's degree recipients and would greatly value your opinions.

Eligible respondents who [<IF POTENTIAL FOCUS GROUP PARTICIPANT> participate in a 90-minute focus group will receive a \$90 gift card <IF POTENTIAL WEB SURVEY RESPONDENT> complete a 20-minute web survey will receive a \$30 e-gift card] as a thank you for their feedback. If you are interested, please click on the link below to take a brief survey to determine your eligibility.

<Link to online eligibility screener>

Please do not share this e-mail or link as it is associated with your specific database entry.

Thank you,

<CONTACT NAME>

<TITLE>

EurekaFacts, LLC

<CONTACT INFORMATION >

Eligibility Screener (Self-Administered and Over the Telephone)

(See “Recruitment Phone Script” in Attachment I for language EurekaFacts agents use when speaking to participants.)

Introduction to self-administered screener (on landing page):

Thank you for your interest. EurekaFacts is carrying out an important research study on behalf of the National Center for Education Statistics (NCES), which is part of the U.S. Department of Education, and **we need your help.**

We are recruiting individuals to participate in a voluntary research study to provide feedback about survey questions. Upon qualifying for this study, you will be sent an e-mail with a link to complete a brief self-administered online survey. If you complete the survey, you will be e-mailed a **\$30 e-gift card** from a major credit card company as a thank you. You can use it to shop online or request to be sent a traditional plastic gift card.

During the survey, you will be asked to answer questions about the impact of your education on your career and life. Some topics may include student debt, repayment, and employment experiences. Additionally, the survey will ask follow-up questions to understand your experience completing the survey. These questions ask you to evaluate the difficulty of the questions, your confidence in your answers, and your understanding of the questions.

Any information gathered during this study, whether online or during the focus group, may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151).

The survey will take about 20 minutes to complete and can be done at a time of your convenience.

If you live close to the Rockville, MD area, you will have the option to come to the EurekaFacts office in Rockville and take part in a focus group about this survey, rather than only completing it online. If you qualify and participate in the study at EurekaFacts, you will receive a **\$90 gift card** from a major credit card company at the end of the session as a thank you. The focus group will be split into two main parts: a survey and a group discussion. The survey is the same as the online self-administered one described above. After completing the survey, EurekaFacts will facilitate a group discussion with about 10 people. We will ask open-ended questions about your overall survey experience and sample contacting materials. The focus group session will be audio and video recorded. The entire focus group session will last no more than 90 minutes and numerous dates are offered.

No matter the method - your participation and opinions will help us improve the questionnaire and contacting materials, so they are clear and can be easily understood and answered by thousands of other individuals across the country.

Are you interested in participating in this research study?

- Yes → CONTINUE
- No → THANK AND TERMINATE

Great, thank you very much. To ensure that we interview a broad mix of individuals, please answer the following brief screening questions. It should take only about 5 minutes of your time.

1. What is the highest degree or level of education you have completed?
 - High school diploma → THANK AND TERMINATE (Ineligible)
 - GED or alternative high school credential → THANK AND TERMINATE (Ineligible)
 - Some college or associate's degree → THANK AND TERMINATE (Ineligible)
 - Bachelor's degree → CONTINUE
 - Master's degree, doctorate, or professional degree → CONTINUE

2. In what month and year did you complete the requirements for your bachelor's degree?
 Specify Month, Year: _____
 [IF PARTICIPANT PROVIDES DATE BETWEEN]:
 - Between May 1, 2013 and December 1, 2014 → CONTINUE (Eligible)
 - Any other date → THANK AND TERMINATE (Ineligible)

3. Have you been employed at any time since completing your bachelor's degree, even if not currently employed?
 - Yes → CONTINUE
 - No → THANK AND TERMINATE

4. What is your <current OR most recent> occupation?
 - Teacher → CONTINUE TO Q4a
 - Other: _____ → SKIP to Q5
 - 4a. What grade do you teach?
 - Pre-K
 - K-12
 Specify Grade: _____
 - 4b. What is the name of the school where you work?
 School: _____ City: _____ State: _____

5. Did you borrow federal or private student loans for your bachelor's degree?
 - Yes
 - No

6. Did you attend a degree or certificate program after receiving your bachelor's degree? (e.g. certifications, master's or PhD, etc.)
 - Yes → CONTINUE TO Q6a
 - No → SKIP TO Q7
 - 6a. Did you borrow federal or private student loans for your post-bachelor's degree?
 - Yes
 - No

7. What is your age?
 - 18-24
 - 25-29
 - 30-34
 - 35-39
 - 40-49
 - 50-59
 - 60 or older

8. Are you of either Hispanic or Latino origin?
 - Yes
 - No
 - Prefer not to Answer

9. What is your race? (Select all that apply)

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Prefer not to answer

10. What is your total annual income based on the following ranges?

- Less than \$20,000
- \$20,000 to \$49,999
- \$50,000 to \$99,999
- \$100,000 or more
- Prefer not to answer

11. What is your sex?

- Male
- Female
- Prefer not to answer

12. **[IF SELF-ADMINISTERED]**

If you are interested in participating in a focus group session at EurekaFacts, we are holding sessions between <DATE> and <DATE>. We are administering sessions at <LOCATION>. What day and time would work best for you to participate in the research interview? If you are not interested, please respond with N/A.

[IF TELEPHONE SCREENING]

[IF POTENTIAL FOCUS GROUP PARTICIPANT: We are administering sessions at <LOCATION> between <DATE> and <DATE>. Would you be interested in attending? **[IF YES:** What day and time would work best for you to participate in the research interview?])

RECORD DATE AND TIME:

13. **[IF SELF-ADMINISTERED]**

To participate in either the web survey or the focus group interview and receive your gift card, we must receive a signed consent form. If you participate in the online survey, you will have to read and complete the consent form before you can be directed to the survey. If you are coming to our Rockville, MD office to participate in the survey and focus group session, you will have to sign the consent form in our office before the start of the study. Do you understand that you must have a completed and signed consent form to participate?

[IF TELEPHONE SCREENING]

[IF POTENTIAL FOCUS GROUP PARTICIPANT: To participate in the interview and receive the \$90 gift card we must receive a signed consent form when you come to our office. Do you understand that you must have a completed and signed consent form to participate?]

[IF POTENTIAL WEB SURVEY RESPONDENT: To participate in the survey and receive the \$30 e-gift card you will be directed to a website landing page (Figure 1), hosted by EurekaFacts. There you must read and complete the consent form before you can be directed to the survey. Do you understand that you must complete the electronic consent form to participate?]

- Yes
- No → THANK AND TERMINATE

14. [IF SELF-ADMINISTERED]

Thank you for your interest. If you qualify, EurekaFacts will reach out to you. For web survey participants, you will be directed to a landing page, hosted by EurekaFacts, where you will log in with a provided passcode and complete the consent form. Then, after completing the survey, you will receive an e-gift card incentive.

For potential focus group participants, we will follow up with you to schedule the exact date of the session.

Can you please provide us with your preferred contact details?

[IF TELEPHONE SCREENING]

[IF POTENTIAL FOCUS GROUP PARTICIPANT: Thank you for your interest. If you qualify, we will follow up with you to schedule the interview. Could you please provide us with your contact information? (All required except "Alternate phone number")]

[IF POTENTIAL WEB SURVEY RESPONDENT: Thank you for your interest. If you qualify, you will be directed to a landing page (Figure 1), hosted by EurekaFacts, where you will log in with a provided passcode and complete the consent form. Then, after completing the survey, you will receive an e-gift card incentive. Could you please provide us with your name and a working e-mail address?]

RECORD FIRST NAME: _____

RECORD LAST NAME: _____

RECORD E-MAIL ADDRESS: _____

BEST PHONE NUMBER (focus group only): _____

ALTERNATE PHONE NUMBER (focus group only): _____

[Termination Language: Thank you for your expressed interest. Based on the requirements of this study, we are not able to include you in the study at this time. <IF TELEPHONE> Have a good <day/evening.>]

Figure 1. Online Landing Page for Web Survey - Screenshot

Thank you for taking the time to complete the 2016/20 Baccalaureate and Beyond survey (B&B:16/20). To begin the survey, please enter your unique ID. Your ID is located on the front of the postcard above your name and address.

The National Center for Education Statistics (NCES), within the U.S. Department of Education, is authorized to conduct B&B:16/20 by the Education Sciences Reform Act of 2002 (ESRA 2002, 20 U.S.C. §9543). EurekaFacts, with RTI International, is administering this voluntary survey on behalf of NCES. There are no penalties should you choose not to participate in this study. All of the information you provide may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151).

Two empty rectangular input boxes stacked vertically, with a "Next" button below them.

Attachment III. Consent to Participate in Research

Consent Form for Participants

CONSENT FORM FOR PARTICIPATION IN RESEARCH

Thank you for your interest in participating in the 2016/20 Baccalaureate and Beyond Longitudinal Study (B&B:16/20) Pretest <web survey/focus groups>. This consent form explains the research study. Please read it carefully and feel free to ask questions about anything you do not understand. If you do not have questions now, you may ask them later as they occur to you.

1. What is this study about?

On behalf of the U.S. Department of Education's National Center for Education Statistics (NCES), EurekaFacts, a research company based in Rockville, MD, is looking for recent graduates to [<IF FOCUS GROUP> come to our office and] complete a self-administered survey [<IF FOCUS GROUP> and participate in a focus group]. These are select survey questions from the 2016/20 Baccalaureate and Beyond Longitudinal Study (B&B:16/20). Your feedback about the survey [<IF FOCUS GROUP> and contribution during the group discussion] will help NCES improve the survey, so it is clear and can be easily understood and answered by thousands of other individuals across the country.

2. IF FOCUS GROUP:

Where will the research interview take place?

You will come to the EurekaFacts office at 51 Monroe Street, PE 10, Rockville, MD 20850. Our office is conveniently located across the pedestrian bridge connected to the Red Line Rockville Metro Station. There is also ample validated parking in our building.

IF WEB SURVEY:

How do I get access to the web survey?

If eligible, you will be sent an e-mail with a link to the survey landing page and a unique passcode to log in to the survey. You will be prompted to provide an electronic signature to acknowledge your consent to participate. Once you've signed the consent, you will begin the survey.

3. What will happen during the <research interview/survey>?

During the survey, you will be asked to answer questions about the impact of your education on your career and life. Some topics may include student debt, repayment, and employment experiences. Additionally, the survey will ask follow-up questions to understand your experience completing the survey. These questions ask you to evaluate the difficulty of the question, your confidence in your answers, and your understanding of the questions.

[<IF FOCUS GROUP> During the focus group, EurekaFacts will facilitate a group discussion with about 10 people. We will ask open-ended questions about your overall survey experience, specific survey questions, and sample contacting materials. The focus group session will be audio and video recorded.]

4. What kind of device <will/can> I take the survey on?

[<IF FOCUS GROUP> You will be taking the survey on a tablet computer provided by EurekaFacts.]

[<IF WEB SURVEY> You can take the survey on any of these three platforms: computer, tablet, or smartphone. You can take the survey on any platform as we are interested in how participants interact with the survey on all devices.]

5. How long will the whole session last?

[<IF FOCUS GROUP> We anticipate the entire session will last 90 minutes. The survey will take about 30 minutes to complete. The group discussion about the survey and contacting materials will take about 1 hour.]

[<IF WEB SURVEY> The survey will take about 20 minutes to complete.]

6. Will information be kept confidential?

You will be assigned a unique identifier (ID), and your name will not be linked to your answers. All of the information provided may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151). [<IF FOCUS GROUP> Audio and video of the session will be recorded only for analysis, and all personally identifying information will be destroyed after <LENGTH OF TIME>.]

7. Will the results go to my place of work?

Your answers will not be disclosed to your company or place of work and will not be linked to any personally identifiable information.

8. Is there an incentive for participating?

Yes. You will receive a [<IF FOCUS GROUP> \$90 gift card <IF WEB SURVEY>\$30 e-gift card] from a major credit card company.]

[<IF WEB SURVEY> Once you complete the survey, you will be asked to verify your e-mail address. In about 1 week, you will receive an e-mail, complete with all instructions about using the electronic incentive. You can use it to shop online or request to be sent a traditional plastic gift card.]

9. What are the possible risks of being in the study?

There are no known risks to participating in this voluntary study.

10. Who can I contact with questions or for further information?

If you have any questions about the study, you can call <NAME>, the <TITLE> at <CONTACT PHONE>. If you have questions about your rights as a study participant, you can call the EurekaFacts' Office of Research Protection at <PHONE NUMBER> (a toll-free number).

11. Can participation end early?

Participation in this study is completely voluntary. You have the right to refuse to answer particular questions. You may elect to stop answering the survey questions at any time.

Yes, I agree to participate in this study

No, I do not want to participate in this study [<IF WEB SURVEY> Pop up: Thank you for your time. You may now exit the website.]

[<IF FOCUS GROUP> By signing below, you agree that you, _____, may participate in this study and that we may record your conversation with the researcher. You will receive a \$90 gift card from a major credit card company at the conclusion of the session.]

[<IF WEB SURVEY> By signing below, you agree to participate in this study and understand that your responses will be recorded. You will be e-mailed a \$30 e-gift card from a major credit card company after completion of the survey (or request to be sent a traditional plastic gift card.). Please allow up to two weeks to receive the e-gift card.]

Your signature below will indicate that your questions have been answered satisfactorily, and that you have read and understood the information provided above.

We thank you for your voluntary participation and ask you to sign the form below.

Print Name: _____

<Signature/Type Name>: _____ Date: _____

To be completed by EurekaFacts staff:

Respondent Payment Card Transaction Number: _____



Attachment IV. Focus Group Protocol

Focus Group Moderation Guide

Road Map of Discussion

Issues/Information to be Discussed	Approx. Allotted Time for Discussion
Welcome/Introduction	3 minutes
Individual Survey Completion	25-30 minutes
Focus Group/Introductions	10 minutes [allot at least 10 min]
Topic 1: Introduction to Survey	5 minutes
Topic 2: Paying for Education	10 minutes
Topic 3: Employment and Teaching Experiences	10 minutes
Topic 4: Contacting Materials	20 minutes
Topic 5: Closing	2 minutes
Total time	90 minutes available

MODERATOR: THIS IS A GUIDE TO HELP YOU LEAD THE DISCUSSION. YOU CAN MODIFY AND ADAPT THESE QUESTIONS TO MEET SITUATIONAL NEEDS DURING EACH SESSION.

Moderator: Review each item and probe thoroughly prior to the focus group. Some items are EITHER MARKED as a “priority” (MUST BE ASKED), NOT MARKED (SHOULD BE ASKED), or MARKED AS “not a priority” (may be skipped if time is needed to complete the focus group).

(Parenthetical text is provided for reference and does not need to be read aloud.)

Welcome - [3 minutes]

I. Introduction

Good [morning/afternoon]. My name is _____ and I work for EurekaFacts, a research company in Rockville, Md. We are carrying out a comprehensive research study on behalf of the National Center for Educational Statistics, part of the U.S. Department of Education.

This is a two part session. During the first part, I'll ask you to complete an online survey that is part of the 2016/20 Baccalaureate and Beyond Longitudinal Study (B&B:16/20). It should take about 25-30 minutes for you to complete the survey. Once everyone has finished the survey, we will use the next hour to discuss your overall experience completing the survey, as well as your reactions to some of the survey questions. I will also show you contacting materials to obtain your feedback about them.

Your views and experiences are important, so we would like you to tell us what you think and feel about your experience completing the survey, the select survey questions, and the contacting materials. It is important that you provide us with your honest opinions and that you understand that we will not make any judgements of you for your opinions. Also, as we are talking about your personal opinions and experiences, it is not necessary for everyone to agree with each other.

DISCLOSURES

1. Mention mics, audio, and videotaping.
2. One-way mirror and associates viewing.
3. Introduce notetaker and role.
4. The session is being audio-taped so I can write an accurate report, not of "who said what," but "what was said." Your name will not be used in the report. We ask each of you to not share with others any of the information discussed in this room today.

II. Survey

At this time, please open your device and sign on to the survey website [provided on cards spelled out and with QR codes] and begin the survey. Please let me know when you are done and wait quietly until all are finished. Thank you.

III. Focus Group

Now that everyone has finished the survey, I want to provide a few more guidelines for the discussion portion of this session.

GUIDELINES

In order to make this session work as a research session, there are some guidelines to follow:

1. Please talk in a voice at least **as loud as mine**.
2. There are no wrong answers – just **different points of view**. Say what you are thinking.
3. We will observe the no smoking rule during this session.
4. In the interest of time, **I may need to move** on to another area of discussion sooner than you are ready and have to cut a conversation short. If I interrupt you, it is not personal; I just want to cover everything on the agenda.
5. Do you have **any questions** before we continue?

Respondent Introductions/Warm Up

To start this section, I'd like to learn a little more about you. Since we will be discussing some topics which relate to your experiences after graduating from college, let's start with who you are and what you studied in school.

Specifically, please share with everyone (this will be on the smart board or a flip chart)

- your first name;
- your area of study;
- whether you've been a Pre-K or K-12 teacher since graduating and, if so, what grade(s) you taught (**MODERATOR – take note of answers for Topic 3**); and
- your favorite pastime.

Topics and Questions for Discussion

Topic 1: Introduction to Survey [5 minutes]

Today we will be talking about your overall experience completing the survey, as well as your reactions to some of the survey questions. So, to begin:

1. What were your overall impressions of the survey?
2. How easy or difficult was it to recall the details you were asked in the survey?
3. How easy or difficult was it for you to recall what you were doing between the dates mentioned?

Topic 2: Paying for Education [10 minutes]

Now we are going to dive a little deeper into the content of the survey, starting with a discussion about paying for your education.

1. The survey asked you to specify how much you borrowed in Federal and private student loans. How easy or difficult was it to recall this information? (PRIORITY)
 - a. **Probe:** Did any of you borrow from both sources? If so, how did you come up with the different amounts? How did you figure out how much was from a Federal loan and how much was from a private loan source? (PRIORITY)
 - b. **Probe:** What was it like to disclose your loan amounts? (NOT a PRIORITY)
 - c. **Probe:** What other answer formats for providing this information would you prefer? (NOT a PRIORITY)
 - i. **MODERATOR: If necessary, offer examples** such as “More or less than X dollars” or “Between X and X dollars.”
2. The survey also asked how often, in the last 12 months, you paid more than the minimum of your monthly payment. You were provided three answer options: never, 1 or 2 times, and 3 times or more. Were those answer options sufficient for you to answer? (NOT a PRIORITY)
 - a. **Probe:** What could we do to improve this question?
3. The survey asked about “Income Driven Repayment (IDR) Plans.” Before today, how much did you know about income driven repayment plans?
 - a. **Probe:** How helpful were the IDR plan definitions provided in the “Help Text”?

4. Overall, how helpful were the definitions and other information in the “Help Text” in this section of the survey?
 - a. **Probe:** Did you use/reference the “Help Text?”
 - b. **Probe:** What “Help Text” information, if any, was confusing or incomplete?
 - c. **Probe:** How easy or difficult was it to access the “Help Text” on the tablet?
5. What, if anything, was confusing or difficult to answer in the how you paid for college section of the survey?
 - a. **Probe:** What would make it less confusing or easier to answer these questions?
6. Finally, would it have been helpful if the survey provided you with the amount you borrowed in federal student loans? Why or why not?

Topic 3: Employment and Teaching Experiences [10 minutes]

Okay, now let's explore the questions about your employment experiences.

1. What do the terms “side jobs” and “informal work” mean to you?
 - a. **Probe:** Are they the same or different? If different, in what way?
2. How easy or difficult was it to recall details about your employer(s), and side jobs or informal work?
 - a. **Probe:** What was easy or difficult about remembering dates of employment or earnings?
3. The survey asked you to “classify the primary industry” of your employers. What was easy or difficult about doing that?
 - a. **Probe:** What does the term “industry” mean to you?
 - b. **Probe:** Were there any terms or phrases you were not familiar with?
4. What was it like to disclose your pay or salary for each position you held? What was easy or difficult about remembering the details?
5. What was easy or difficult about searching for your job title? Was your job title listed?
6. What is the difference between being “allowed to telecommute” and to “work remotely?” (NOT a PRIORITY)
7. How easy or difficult was it for you to recall your level of satisfaction in each of the job areas listed? (E.g., Wages/bonuses, benefits, promotional opportunities, job security, work/life balance, commute, importance of work, work challenge). Why? (NOT a PRIORITY)
8. The survey asked for reasons you might have pursued informal work or side jobs, such as supplemental income, disposable income (travel/entertainment), personal enjoyment, exploring options, developing skills, expanding network? What, if anything, should be added?
9. What questions, if any, were confusing or difficult to answer in the general employment section of the survey?
 - a. **MODERATOR: Provide examples to help participants remember, if needed:** for example, number of employers, employer industry, dates of employment, pay rate, hours per week, supervision,

scheduling flexibility, benefits, reasons for leaving, satisfaction on different criteria, and informal work?

b. **Probe:** What would make it less confusing or easier to answer these questions?

MODERATOR: Recall from introductions how many participants were Pre-K and K-12 teachers during the timeframe the survey is testing. If none, please skip to “Contacting Materials.”

Okay, now we are going to transition to a discussion about your teaching experiences.

1. What was it like to search for the school where you were/are a teacher? Was your school listed?
2. You were asked to select the lowest and highest grades you taught. What could we do to improve this question? (NOT a PRIORITY)
3. Several lists were presented in this section of the survey, how easy or difficult was it to view the lists? What would have made it easier?
4. If you taught at different schools, what was it like to recall the details of what you did at each school?
5. **For pre-K teachers**, what, if anything, about your experiences as a Pre-K teacher made these questions easier or more difficult to answer?
6. If you taught at more than one school, the survey prompted you to explain the main reason you left the previous school. Was the list provided comprehensive? If not, what needs to be changed? (NOT a PRIORITY)
7. What, if anything, was confusing or difficult to answer in the teaching experience section of the survey?
 - a. **Probe:** What would make it less confusing or easier to answer these questions?
8. This survey required you to answer questions about the different employers you have had and different schools you have taught in during a specific timeframe, can you think of a better way to present this information? If so, please explain.

Topic 4: Contacting Materials [20 minutes]

Section I: Envelopes (5 minutes)

Now we want to show you some contacting materials to get your impressions and feedback.

MODERATOR: Distribute the envelopes worksheet and a set of envelopes to each participant.

Imagine that you were selected to take part in the B&B:16/20 study conducted by the National Center of Education Statistics. This means that you received a letter in the mail, addressed to you.

1. In front of you there are 4 different envelopes. Please order them in terms of which one you are most likely to open and record your response on the worksheet. Also, please answer the question on the worksheet related to your most preferred envelope.

Now, let's talk some more about the envelopes:

2. What was the most important factor that influenced your decision to open a particular envelope?
 - a. **If needed, probe:** And why?

3. Focusing on only the envelope with the \$2 bill [SHOW ENVELOPE] – how important was the picture in your decision? In what way, if any, did the suggested or actual value of the incentive influence your decision?

Section II: Brochures (15 minutes)

Next, let's talk about other materials that may motivate people to participate. Imagine that you received an envelope in the mail, addressed to you, containing an invitation letter and a study brochure or a flyer like the one I am holding up. The invitation letter typically contains information on the study, how you were selected, what incentive is offered (or already included), and how you can log in to take the survey.

MODERATOR: If necessary slowly walk around the room showing the brochure to the participants without giving them enough time to read the contents.

Let's focus on what pieces of information to include in the brochure or flyer.

4. Should the brochure convey only new information or should we repeat some of the topics also included in the invitation letter? Which, if any, topics should we repeat?
5. What pieces of information would you want to find in a brochure or pamphlet like the one I showed you that would make you want to participate in the study and why? **NOTETAKER – write answers on a flip chart or the white board.**
 - a. **If needed, probe:** What about ...
 - Study content
 - Study sponsor
 - Introducing the study team
 - Sample member selection
 - Data use
 - Privacy and confidentiality
 - Sample member's rights (voluntary participation, etc.)
 - Study contact/help desk information
 - Past results
 - b. **Probe:** Is there anything else that you thought of during our discussion that you would like to add?

MODERATOR: Distribute the brochures worksheet to each participant.

6. Using the worksheet, please select a maximum of 3 topics that are most likely to make a difference in your decision to participate when you look at a study brochure. Please rank those 3 topics assigning 1 to the most important topic and 3 to the least important topic. You may use the empty lines to add topics that you feel are important but are missing from the list. Also, please answer the general question related to the study brochure.

MODERATOR: Distribute a set of brochures to each participant.

In front of you there are brochures and flyers from different studies. Please take a few minutes to look at the different formats but ignore the content.

7. Ignoring the content of the brochures and flyers in front of you, which format do you like the best and why?

Topic 5: Closing [2 minutes]

1. What was your overall experience like when completing the survey?
2. What did you like most about the survey? Why?
3. What did you like least about the survey? Why?
4. Did you experience any difficulties using the tools or functions in the survey? Which ones?
5. What suggestions do you have to make the survey easier to understand?
6. What suggestions do you have to make the survey easier to complete?

MODERATOR: Please excuse yourself to check with the observers to determine if there are any additional questions.

MODERATOR: After asking any follow-up questions, thank and dismiss the participants.