**FOCUS GROUP/INTERVIEW**
*Feedback Form*

OVC ◆ TFMC
Building Organizational Financial Management Capacity ◆

**OMB: ####-####**
**Date of Expiration: ##/##/####**

**[This protocol lists a number of questions that might be selected for a typical focus group or interview. It is not intended that a focus group or interview would include all of these questions. Instead, this serves as a bank of focus group and interview questions from which to choose. Focus groups will last between 60 and 90 minutes. Interviews will last approximately 1 hour].**

**Focus Group Introduction:**

Thank you for agreeing to participate in this focus group discussion. I'm [*insert moderator name*], and I will facilitate today's session. I am joined by [*insert support staff and their role*].

Each of you has been selected because you [*insert specific reason for participation*]. The information gathered in this focus group will be used to inform OVC TFMC's services. [*Briefly introduce OVC TFMC in a way that makes sense for current context*]

In a group such as this, it is important you express yourself openly. There are no right or wrong answers. We want to know what you think. We are recording the session to ensure accuracy. However, your response will not be linked with your name or affiliation in any way. Everything will be anonymous. Recording will not start until after introductions.

Because we are recording, I may remind you occasionally to speak up and to talk one at a time, so I can hear you clearly when I review the session tapes. I am your moderator, but I want the interaction to flow among you. Each time I ask a question, there is no need for everyone around the table to respond. However, it is important that a wide range of ideas are expressed. If you would like to add an idea, or if you have an idea that contrasts with those that have been shared that's the time to jump into the conversation. You don't have to go in a circle. There is no such thing as "your turn." It's always your turn.

Before we get started with introductions, let's lay some ground rules for how today's discussion will operate. [*Have standard ground rules for all groups, including restroom, timeframe, talking one at a time, respecting divergent opinions, having conversations stay in the room, etc.*].

If you have any questions about this focus group, please contact [*insert contact information and reference business cards*]. Any questions before we begin?

1. Introduction and Ice Breaker
    - Let's start with introductions. Please give us your first name only and [*insert ice breaker question and encourage "popcorn style" responses by participants*].

[*start recording*]

**Interview Introduction**
Thank you for agreeing to participate in this interview. I'm [*insert name*], and I will facilitate the interview today. I am joined by [*insert support staff*], and s/he will be taking notes.

In order to help OVC TFMC better serve the field, we are interested in your feedback since you've received the training and technical assistance (T/TA). Participating in this interview is voluntary; you may end the interview at any time and choose not to answer questions. We will protect the confidentiality of your responses using procedures we have in place, including reporting all information in aggregate to avoid identifying information. Only members of the OVC TFMC Evaluation Team have access to information that could identify respondents.

Before we get started, do you have any questions about this interview?

**Possible Questions**

1.  **General questions**

    *   How satisfied were you with your overall OVC TFMC experience?

    *   How satisfied were you with the overall quality of support you received from OVC TFMC staff?

    *   How has working with OVC TFMC improved your [*insert type of skill(s) related to training/event/tool objectives*]?

    *   What were your expectations prior to [*insert T/TA*]?

        o   How well were these expectations met?

    *   What types of financial skills did you enhance by attending [*insert event/training*]?

    *   How well did [*insert event/training/tool*] meet [*insert objectives – ask about one objective at a time*]?

    *   Identify what you [*plan to do or change*] [*did*] as a result of the [*insert T/TA*] you received. Please be as specific as possible (e.g., actions or changes in policy, practice, procedures, etc.)

    *   What barriers [*do you anticipate facing*] [*have you experienced*] in [*insert response from previous question*]?

2.  **How did you learn about the tool/resource/TTA**

    *   Have any of you heard of [*insert name of product, tool, topic*]? [*Show of hands or possibly a tailored webinar poll question*]

[*If focus group participants do not have experience with the tool under review, please spend some time (e.g. 5-10 minutes) showing them the tool/resource and how it works. Please encourage them to ask questions and make comments about what they see and do not see as you are showing them the tool*]

Think about your previous experience with reading, using, or learning about [*insert name of product, tool, topic*]. If you don't have previous experience, think about what we just showed you and how it could be used in your work [*may have them write answers on notecards, use webinar poll questions, use flipchart, etc.*].

    *   Where did you learn about this tool [*training/conference/newsletter/website*]? [*If they mention anything specific, ask which one (e.g. which training, which conference, etc.)?*]

    *   Where would you usually go to find this type of information, tool, or topic?

    *   Once you heard about it, was this tool easy to find? Is it accessible to everyone who might need it? If not, what should be changed?

    *   Is there a place to put this tool that users would find easier to locate?

    *   Are there other places you already go to get this information? What do you like about them? What do you dislike about them?

3.  **Appropriateness/comprehensiveness of information/content (may ask about tool overall or by module/component)**

- How well did the information align with your expectations about what you wanted to see or were looking for? What was missing?

- Was the information too advanced/detailed or too basic?

- How is the information applicable to your work?

- What other topics need tools similar to this one?

- How well did [*insert event/training/tool*] address culturally and linguistically appropriate services?

  o What needs to be improved moving forward?

- In what ways has attending [*insert type of T/TA*] impacted organizational culture related to [*insert examples of financial infrastructure*].

*[Ask the group about each module, as needed—do they have experience with it? Is it appropriate? What were they expecting or looking for—and find out specific information about how it meets their needs or can be improved to do so.]*

4. **Ease of use of tools (such as the website, Virtual Support Center)**

- How do you feel about the way the information is displayed on [*insert tool, e.g., website*]?

  o What do you like about it?

  o What do you dislike?

- If it was difficult to use, how so?

- What would make it easier to use and understand?

- What about the layout, length, format, readability of the [*web page/resources*]?

- Is the level of interactivity of the tool appropriate?

- Is the length of information about right?

- What do you think of the content layout (e.g., bullets vs. paragraphs)?

- Was the information/tool easy to understand and user friendly? How so? If it was difficult to use, how so?

- What future direction do you think we should take with this tool?

*[If there are specific aspects of the tool where feedback is needed, visit those aspects and ask these questions for each aspect.]*

5. **Utility**

- How was this [*tool, training, meeting, etc.*] helpful?

  o How did you, or how would you, use the information/tool?

  o If you won't use it, why not? What do you need that is not here?

- How was this [*tool, training, meeting, etc.*] not helpful?

  o How could [*reference answers from previous question*] be improved? What was missing?

- Was there anything not provided by [*insert T/TA*] that would have been helpful in [*insert outcome*]

- How well does [*insert specific objective, session title, etc.*] align with the needs of your organization/community?

- At the completion of [*insert T/TA*], did you have specific action steps?

  o How well did these action steps align with the needs you identified prior to the training?

  o How confident do you feel in your ability to implement these action steps?

  o How supported do you feel by OVC TFMC staff in implementing these action steps?

  o [*3, 6, etc.]* months later, in what ways have you implemented your action steps/strategic plan?

  o Reflecting back, what would have changed about your action steps/strategic plan?

[*If specific aspects of the tool require feedback, visit those aspects and ask these questions for each aspect.*]

6. **Preparedness**

- What planning occurred prior to the [*T/TA*] that made the response more effective?

- Which organizations/individuals participated in the planning process? What roles did they play?

- Who was missing from the planning process?

- What was most beneficial and challenging about the planning process?

- What would you recommend to others *[doing similar planning for TFMC events]*?

- Is/was a needs assessment conducted to *[insert purpose]*? How helpful was it?

7. **Communications**

- Do you have any ideas for ways to support more information sharing between *[organizations, groups, staff personnel within groups, etc.]*?

- Who and how do you reach out to other *[organizations, groups]* when you have questions or need resources?

- How can communication be improved?

8. **Financial capabilities and use of technology**

- What protocols are in place to [*identify*][*resolve*][*insert financial management issue*].

  o What is working well about these protocols?

  o What about these protocols needs improvement?

- How many staff at your organization have responsibilities associated with the financial management of one or more grants?

- What kind of support or systems and structures exist to help the stability of your organization's financial infrastructure?

- What protocols are/were in place and what role does/did technology play in [*insert relevant information*]? Is/was technology used to [*insert relevant information*]? What other technological strategies were used to aid [*insert relevant information*]?

9. **Training and resources**

- Has your [*group, organization, etc.*] received any [*training, resources, etc.*]? Where they useful? Why or why not? (*note: can be any trainings, not just those from TFMC*)

- What impact has the [*insert information* had on the [*group, organization, financial infrastructure, etc.*]?

- Can you think of any training you've attended that has been particularly useful? Which trainings have you found most useful to your [*group, organization, etc.*]?

10. **Successes and challenges/barriers**

- Thinking about the integration [*insert financial capability, information, technology, etc*] in your organization:
  o What were some of the successes?
  o What were some of the challenges?

- When you think of a "success" of [*insert relevant information*], what comes to mind?

- How would you define success for the [*insert relevant information*]? Any promising strategies you would like to share?

- What would you do to make your [*group, organization, etc.*] more "successful" at financial management?

- What are the most difficult challenges for [*insert relevant information*]?

- Were there any gaps in services that impacted [*insert relevant information*]? What were they, and how were they addressed?

- What were the challenges to establishing [*insert relevant information*]? *[convening the T/TA, subsequent response afterwards, timelines, etc.]*

11. **Lessons learned and best practices**

- Overall, based on your experience with [*insert relevant information*], what were the greatest lessons learned as your organization engaged in efforts to strengthen its financial infrastructure?

- What would you consider as best/promising practices related to financial and grants management? Why?

- What is the most important thing for other *[communities, organizations, individuals, etc.]* to know in [*insert financial capability, financial management, etc.*]?

12. **Identified and anticipated technical assistance needs**

- What additional trainings are needed related to [*insert relevant information*]?

- o What would you identify as your top five training needs?

- o What are the best modes of delivery to provide these trainings?

- What additional technical assistance needs are related to the financial management of grants?

- With a show of hands, how many of you would recommend OVC TFMC to others to receive training?

  - o What about the trainings do you see as beneficial?

- With a show of hands, how many of you would recommend OVC TFMC to others to receive technical assistance?

  - o What about the technical assistance do you see as beneficial?

- What could be improved for future activities?

- What is important for OVC TFMC to know about the needs of tribal organizations and their capacity to maintain good financial standing with their grants?

**Closing (5 minutes)**

As our discussion comes to a close, we would like to thank you for taking the time to speak with us today and express our appreciation for your participation. The ideas you have discussed will be helpful for [*insert purpose of focus group/interview*]. Do you have any additional comments, insights, or questions? If you have questions or concerns after you leave here today about your participation, please contact [*insert POC and provide contact information/business cards*].