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usability sciences	**Bowen Financial Reader Screener**

High-level Summary:

KEEP CLIENT NAME AND WEBSITE BLIND AND CONFIDENTIAL DURING ENTIRE PROJECT/RECRUIT

- Recruit 9 Service members of the military (8 + 1 replacement)
- Recruit 7 Military Spouses/Eligible Partners (6 + 1 replacement)
- Recruit 4 Service Providers (no replacements) (Provided by client) / This segment does not need to be screened
- Recruit a mix of active duty and guard/reserve (active duty preferred)
- Recruit a mix according to military branches
- Do not recruit anyone from Coast Guard
- Target those between 18-30 years of age, but okay to allow 2 users above 30 (refer to Q9)
- Recruit a mix according to ethnicity
- Service members - Recruit a mix of single and married
- Service members/spouses – Do not recruit from the same family
- Must be Internet savvy
- Must use the Internet when researching their military needs

User Quota: Recruit 20 for 18 completes

Session Length: 90 minutes

Other: Nationwide Recruit / Remote Sessions

OFFICE USE ONLY			
User Name:			
Phone:			
Email:			
Today's Date:			
Date of session:	**Session Time:**	☐ Confirmation Sent	☐ Reminder Sent

Research Segments

☐Service member   [RECRUIT 9]
☐Spouse of service member   [RECRUIT 7]
☐Service Provider   [RECRUIT 4]

[Type here]

(RECRUITER: PLEASE INCLUDE BELOW STATEMENT ON ALL OUTREACH, EMAIL/OTHER COMMUNICATIONS AND ALSO READ OUTLOAD WITH EACH USER)

Thank you for your time today. This interview should take about 15 minutes. Your participation in this interview is voluntary and you are welcome to terminate the meeting at any time. The team is screening for candidates to participate in a website usability study for the military community on the topic of financial resources, focusing on website content, layout, and navigation.

This study is sponsored by the Department of Defense Office of Financial Readiness (after first use: DoD Office of Financial Readiness). Study staff will diligently protect your personal information and ensure that your opinions, ideas, concerns, etc. will not be identifiable as you. While the information in this study will be used only for research purposes, results and recommendations will be shared with government officials, however your identity will remain anonymous.

Additionally, for your information, we wanted to let you know that the team has received permission through the Office of Budgeting and Management (OMB) to conduct this research, which meets licensing requirements outlined in the Paperwork Reduction Act.

[Type here]

<u>Preliminary Questions</u>

Q1)   A. Which of the following, if any, apply to you? ...
☐ I am currently a service member of the military [RECRUIT 8+1 replacement: CONTINUE TO Q2]
☐ I am currently a spouse/eligible partner to a member of the military [RECRUIT 6+1 replacement: SKIP TO Q3]
☐ None of the above [**TERMINATE**]

Q2)   (SERVICE MEMBERS ONLY)

A.   Are you currently on <u>active duty</u> or <u>guard</u> or <u>reserve</u>?

☐ Active duty [CONTINUE]   ☐ Guard/reserve [CONTINUE]

- **RECRUIT A MIX OF ACTIVE AND GUARD/RESERVE**

B. Do you have any sort of leadership position with your command, yes or no?
☐Yes; please specify but do not include any personally identifiable information: _____
☐No

- **RECRUIT 1 WHO HAS A LEADERSHIP POSITION WITH THEIR COMMAND. THESE ARE USERS WHO HAVE RESPONSIBILITY OF OTHER MILITARY PERSONNEL.**

C. Which Military Branch?
☐ Army   [CONTINUE]
☐ Marines   [CONTINUE]
☐ Navy   [CONTINUE]
☐ Air Force   [CONTINUE]
☐ Space Force   [SEE BELOW]
☐ National Guard   [CONTINUE]
☐ Coast Guard[**TERMINATE**]

- **RECRUIT A MIX OF BRANCHES. OKAY IF SPACE FORCE IS NOT REPRESENTED. TERMINATE COAST GUARD**

D. How long have you been in the military? _____

- **RECRUIT A MIX OF THOSE IN THE MILITARY 5 YEARS OR LESS AND THOSE IN THE MILITARY OVER 5 YEARS**

Q3)   (SPOUSES/ELIGIBLE PARTNERS ONLY)

A.   Is your spouse currently on <u>active duty</u> or <u>guard</u> or <u>reserve</u>?

☐ Active duty [CONTINUE]   ☐ Guard/reserve [CONTINUE]

- **RECRUIT A MIX OF ACTIVE AND GUARD/RESERVE**

B. Which Military Branch?

☐ Army   [CONTINUE]
☐ Marines   [CONTINUE]
☐ Navy   [CONTINUE]
☐ Air Force   [CONTINUE]
☐ Space Force   [SEE BELOW]
☐ National Guard   [CONTINUE]
☐ Coast Guard[**TERMINATE**]

- **RECRUIT A MIX OF BRANCHES. OKAY IF SPACE FORCE IS NOT REPRESENTED. TERMINATE COAST GUARD**

C. What is your current employment status? (INFORMATIONAL ONLY)

☐ A full-time employee   ☐ Student (full or part-time)
☐ Self-employed   ☐ Retired
☐ Working part-time   ☐ Currently seeking employment/not currently employed
☐ Stay-at-home parent or Homemaker

☐Other (Please specify but do not include any personally identifiable information): _____

Q4)   Including yourself, do you or does anyone in your immediate family currently work for or have previously worked for any of the following types of businesses or companies?

☐ TV, Radio, or Newspaper   [**TERMINATE**]
☐ Advertising/Marketing/ Marketing Research   [**TERMINATE**]
☐ An Internet, online, software or computer related field   [**TERMINATE**]
☐ Web Development, Web Design, or Usability   [**TERMINATE**]
☐ Other design, graphic arts, or visual arts   [**TERMINATE**]
☐ None of the above   [CONTINUE]

Q5)   When was the last time you participated in **any** type of market research study where you provided feedback in a discussion group/focus group setting or during an individual/usability session – or something similar. This includes studies with us, as well as studies with other companies.

☐ Less than six months ago   [**SEE BELOW**]
☐ Six months ago to a year   [CONTINUE]
☐ More than a year ago   [CONTINUE]
☐ Never   [CONTINUE]

- **IF SLIGHTLY UNDER 6 MONTHS, SEEK CLIENT APPROVAL**

Q6)   A. Where is your current duty station? Please do not include any personally identifiable information. _____

_____

_____

- **RECRUIT A MIX ACCORDING TO GEOGRAPHICAL REGIONS**
- **OKAY IF 1-2 DALLAS USERS ARE INCLUDED IN THE MIX**

[Type here]

Demographics

Q7)   Gender: (INFORMATIONAL ONLY)

☐Male
☐Female
☐Other (Please specify but do not include any personally identifiable information): _____
_____

Q8)   Which range best describes your current age?

☐ Under 18   [**TERMINATE**]
☐ 18-24   [TARGET AGE RANGE-STRIVE FOR A MINIMUM OF 4 SERVICE MEMBERS]

☐ 25-30   [TARGET AGE RANGE]
☐ 31-35   [SEE BELOW]
☐ 36-44   [SEE BELOW]
☐ 45-54   [SEE BELOW]
☐ 55-64   [SEE BELOW]
☐ 65 & over   [**TERMINATE**]

- **TARGET THOSE BETWEEN 18-30 YEARS OF AGE, WITH AT LEAST 4 SERVICE MEMBERS BETWEEN 18-24**
- **OKAY TO HAVE UP TO 2 WHO ARE OVER 30; IF ALREADY HAVE 2 OVER 30, BUT HAVE SOMEONE ELSE WHO IS SLIGHTLY OVER 30, HOLD FOR CLIENT REVIEW**

Q9)   Which best describes your marital status?

☐ Married
☐ Single
☐ Divorced
☐ Widowed
☐ Other (Please specify but do not include any personally identifiable information): _____

_____

- **SERVICE MEMBERS – RECRUIT MIX OF SINGLE AND MARRIED**
- **SPOUSES, INFORMATIONAL**

Q10)   Do you have any children 21 years or younger who live in your household? (INFORMATIONAL)

☐ Yes   ☐ No

Q11)   What was the last year of school or college you/your spouse completed? (INFORMATIONAL ONLY)

☐ Less than High School Graduate
☐ High School Graduate
☐ Some college or still in college
☐ Associate Degree
☐ College Graduate
☐ Post graduate work

Computer/Internet Experience

Q12)   A. What are some resources you use when researching your military needs, such as financial information, health, education, relocation, etc.?

☐ Other military families   [INFORMATIONAL]
☐ Government   [INFORMATIONAL]
☐ Internet   **[MUST SELECT]**
☐ Other (Please specify but do not include any personally identifiable information): _____
_____

- **MUST SELECT INTERNET, OTHERWISE TERMINATE**

B. You mentioned the Internet. Specifically, which of the following categories have you research online or conduct online activities for - related to your military needs?
☐Health
☐Education
☐Relocation
☐Financial   [**TARGET – SEE BELOW**]
☐Counseling
☐Other (Please specify but do not include any personally identifiable information): _____

- **TARGET THOSE WHO SELECT FINANCIAL, BUT IF HAVING ISSUES WITH THE RECRUIT, THOSE WHO DO NOT SELECT FINANCIAL, SKIP AND ASK Q13D. THOSE WHO DO SELECT FINANCIAL, CONTINUE TO Q13C**

C. (THOSE WHO SELECTED FINANCIAL)
What are some specific websites you've used when researching financial information/services or conducting financial activities, as it relates to your military needs or resources?

- **INFORMATIONAL, BUT <u>KEEP CLIENT NAME AND WEBSITES CONFIDENTIAL.</u> SIMPLY ALLOW USER TO SHARE SITES, VERSUS ASKING ABOUT SITES DIRECTLY. SKIP TO Q14**

D. How likely is it that you would use the Internet to research financial information/services, as it relates to your military needs?

☐ Very likely   [CONTINUE]
☐ Somewhat likely   [CONTINUE]
☐ Not very likely   **[TERMINATE]**
☐ Not at all likely   **[TERMINATE]**

Q13)   Which of the following technology devices do you use on a regular basis?

☐	Desktop/Laptop	CONTINUE
☐	iPhone	RECRUIT X WHO ALSO SELECT ONE OF THESE OPTIONS
☐	Android Phone	
☐	Other Smartphone	
☐	Non-Smartphone	
☐	Tablet	

Q14)   Other than email, approximately how many hours per week do you spend on the Internet?

☐ 0   **[TERMINATE]**
☐ 1-3   [CONTINUE]
☐ 4-5   [CONTINUE]
☐ 6-10   [CONTINUE]
☐ Over 10   [CONTINUE]

Q15)   Besides email, please select which of the following online activities you typically do while on the Internet.

01	Read news, current events, weather, sports, etc.	☐
02	General research (i.e. health, travel, entertainment, etc.)	☐
03	Browse/Shop for products	☐
04	Purchase products	☐
05	Online banking/pay bills	☐
06	Online social networking (i.e. Facebook, Twitter, Pinterest)	☐
07	Download/upload movies, pictures, etc.	☐
08	Play games	☐
09	Other (Please specify but do not include any personally identifiable information): _____	☐

- **MUST SELECT 2 OR MORE ACTIVITIES**

[Type here]

Q16)   A. Research sessions will be conducted remotely, and you will connect with our researcher using Zoom, with your computer/Smartphone.

How comfortable are you in participating, using the Zoom platform on your computer?

	COMPUTER	MOBILE
☐Very comfortable	CONTINUE	CONTINUE
☐Somewhat comfortable	CONTINUE	CONTINUE
☐Not very comfortable	SEE BELOW	CONTINUE
☐Not at all comfortable	SEE BELOW	CONTINUE

- **PROBE ON THE CONCERNS AND IF USER PREFERS ANOTHER PLATFORM, CONSULT WITH RESEARCHER**

B. You will also need a quiet place to participate, where you will not be interrupted. Will this be possible? Note – you can participate from work or home, as long as you have a high-speed Internet connection/Wi-Fi and a computer/Smartphone. You will not be able to participate from your vehicle or a public venue where noise level may be an issue.

☐Yes, can participate in quiet place with no/minimal interruptions [CONTINUE]
☐Not possible [THANK FOR YOUR CONSIDERATION]

Q17)   Overall, what are some of your more favorite websites to visit and why? Please do not include any personally identifiable information.

Note respondent's ability and willingness to articulate and share information and your ability to understand him/her (excuse individuals who do not speak English well or have very heavy accent)

☐ Yes, respondent is articulate, easy to understand, and willing to share information.   [CONTINUE]
☐ No, respondent is not articulate, not easy to understand, or not willing to share.   [**TERMINATE**]

Invitation

CONGRATULATIONS! We would like you to participate in a one-on-one usability session in which you will provide feedback on a military website, specifically the content, layout, and navigation of the site. Sessions are 90 minutes, and you will receive $75 compensation for your time. Are you able to participate and willing to provide feedback?

Date of testing: TBD

☐ Yes [Proceed to schedule]
☐ No   [Thank you for your time. Hopefully you can join us next time.]

- As previously explained, this study is sponsored by the DoD Office of Financial Readiness. You participation is completely voluntary.

[Type here]

- There is not any preparation that needs to occur ahead of time and we ask that you **do not do anything outside of your normal activities prior to your schedule session.**
- As a reminder, you are the only person scheduled during this time slot, thus it is important that you plan to arrive on time. If you cannot make your scheduled time slot, we ask that you call directly to let us know – and please call us as soon as you can so that we have time to find a replacement user.
- Sessions are recorded, for internal purposes only, so that our analysts can review any of the valuable insights they learn during the sessions.
- I will be sending you an NDA to review/sign. The NDA must be signed and returned before your scheduled session. We cannot run your session if we do not have the signed form.
- If you wear eye glasses/reading glasses, please be sure to have those easily accessible during the session.
- Let us know if you have any special needs that we need to accommodate.
- (Recruiter -- explain confirmation email, reminder email, remote instructions, directions, and importance of arriving early.)

--END OF SCREENER--