

Determining Library Staff Training Needs: Focus Group Questions

Welcome

Hello and welcome. Thanks for taking time to talk about our training needs in the area of personal finance and investing. My name is _____ and assisting me is _____, who will take notes during our discussion (or record our discussion).

Overview of Topic

We want to gather information about our library staff training needs related to personal finance and investing. We'll explore three broad areas: 1) your assessment of your *knowledge* of unbiased, accurate personal finance information sources and community services; 2) your *confidence* in responding to patrons' questions on this topic; and 3) your *skills* in designing effective educational programs that address personal finance and investing. We are eager to hear your ideas about how we can better prepare our staff to help our library patrons with personal finance questions.

Ground Rules¹

Before we get started, let's review and agree to some guidelines for our discussion:

- There are no right or wrong answers. We expect you to share differing views.
- We are taking notes (or recording) to make sure we capture all ideas, but your names will not be associated with specific comments in our summary.
- The name tags/name tents help me facilitate the discussion. Please talk with each other. I am here to ask questions and to make sure we hear from everyone.
- Please silence your phones. If you need to step out for any reason, please feel free to do so.
- I will honor the time commitment you have made. We have allocated up to _____ minutes for this focus group. I will move the discussion along so that we conclude no later than _____ (time of day).

¹Krueger, Richard A. & Casey, Mary Anne. (2009). Focus Groups: A Practical Guide for Applied Research. 4th edition. Thousand Oaks, CA: Sage Publications.

Questions

1. *Opening Question:* Let's begin. Let's find out more about each other by going around the table, one at a time. Tell us your name and how long you have worked at (this library).

2. We aren't going to go around the table anymore, so just jump into the conversation. Please think back to the resources you use to answer patrons' personal finance and investing questions. How do you feel about your ability to find good—unbiased and accurate—information sources on personal finance and investing topics?

3. Let's dig a little deeper into the types of personal finance questions that come up. For which topics are you most likely to be able to identify good resources—either on the web or in the library? Which topics are the most challenging for you? [*Probe*, if few responses: What areas of personal finance and investing do you feel least knowledgeable about: budgeting and record keeping; banking services; income taxes; insurance; homebuying; children and money; financing college; consumer credit; investing; retirement planning; consumer protection and fraud? These topics could be written on a flipchart before the group begins and revealed during this discussion.]

4. Sometimes a library patron needs information about community resources or services—such as social services that assist during a time of financial hardship or perhaps professional financial services that provide personal advice to guide specific financial decisions. Where do you get this information about services and resources in the community?

5. How do you feel about offering youth or adult programming on personal finance and investing topics? *Probes:* What are the challenges of youth programs on personal finance? The challenges of adult programming? What would help you be successful in offering such programs?

6. What ideas come to mind when you think about the training needs of our library staff related to addressing the personal finance and investing questions that come to us?

7. Of all the training needs we have discussed, which do you think would be the most helpful to you?