

**FINANCIAL MANAGEMENT SERVICE
EFTPS FOCUS GROUP
SMALL BUSINESS OWNERS**

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Recruiter: _____

***DATE TBD: New York (Two Groups)
DATE TBD: Chicago (Two Groups)
DATE TBD: Los Angeles (Two Groups)***

Hello. My name is _____ and I'm calling from KRC Research on behalf of the Financial Management Service (FMS), a bureau of the U.S. Department of the Treasury. We are an independent research firm working with FMS. This is NOT a sales call. We are conducting a research discussion group in your area with small business owners on how federal tax liability is paid to help us better understand how the tax payment system works for you.

Again, this call is for research purposes only. FMS is not interested in your name or in any specific details about you as an individual or your business.

This research discussion group will be held on (DATE) at (EXACT TIME) and last approximately two hours. The discussion will include about eight or nine other small business owners such as yourself. **As a token of our appreciation for your time, you will receive \$250 for participating in the discussion group.** Would you be available at that time? (IF NO, THANK THEM AND TERMINATE THE CALL.)

The following questions are to make sure we are speaking to a range of small businesses owners. Your specific answers will not be shared with anyone.

IF TERMINATE DURING SCREENING PROCESS READ: I'm sorry, we already have enough participants in that category. Thank you very much for your time.

INTERVIEWER INSTRUCTION: IF RESPONDENT EXPRESSES CONCERN AT ANY POINT DURING THE INTERVIEW, REASSURE THEM THAT YOU DO NOT WORK FOR THE GOVERNMENT. YOU ARE WORKING FOR AN

INDEPENDENT RESEARCH COMPANY. THEIR ANSWERS AND PARTICIPATION WILL BE COMPLETELY CONFIDENTIAL AND THEIR INDIVIDUAL RESPONSES WILL NOT BE SHARED WITH ANYONE.

IF RESPONDENT WANTS A PHONE NUMBER TO CALL TO VERIFY THIS IS A LEGITIMATE SURVEY: MELANIE RIGNEY, FMS, AT 202-874-6763.

1 RECORD GENDER:

Male	<input type="checkbox"/>	
Female	<input type="checkbox"/>	

2 Do you or does anyone in your immediate family work for any of the following? (READ LIST.)

	YES	NO
In advertising or public relations?		
In marketing or opinion research?		
In journalism or for the news media?		
For the federal government?		
As a tax preparer, CPA, or in an accounting firm?		
TERMINATE IF YES TO ANY OF ABOVE.		

3 Thinking about your company's total federal tax liability, or how much you paid in taxes in 2006, within which of the ranges would your company's federal tax liability fall? (READ RESPONSES.)

None	<input type="checkbox"/>	TERMINATE
\$20,000 or less	<input type="checkbox"/>	
Over \$20,000	<input type="checkbox"/>	

4 Including yourself, how many employees does your company have? (READ RESPONSES.)

1 to 4	<input type="checkbox"/>	
5 to 10	<input type="checkbox"/>	
More than 10	<input type="checkbox"/>	TERMINATE

5 Which of the following best describes your company? (READ RESPONSES.)

Sole proprietorship	<input type="checkbox"/>	
Partnership	<input type="checkbox"/>	
Limited Liability Corporation	<input type="checkbox"/>	
“S” Corporation	<input type="checkbox"/>	
“C” Corporation	<input type="checkbox"/>	
Publicly held corporation	<input type="checkbox"/>	
Franchise	<input type="checkbox"/>	

6 How does your company currently pay its federal taxes? (READ RESPONSES.)

By using a paper voucher and bringing a check to a bank teller	<input type="checkbox"/>	
By using a paper coupon and sending a check via mail		
Electronic Federal Tax Payment System (EFTPS)	<input type="checkbox"/>	TERMINATE
Electronic Funds Withdrawal	<input type="checkbox"/>	TERMINATE
Credit Card	<input type="checkbox"/>	TERMINATE

7 Which of the following best describes your involvement in the decision on how your company’s federal business taxes are paid? (READ RESPONSES.)

I am the primary decision maker	<input type="checkbox"/>	
I make the decision equally with someone else	<input type="checkbox"/>	
I have a great deal of influence on the decision	<input type="checkbox"/>	
I have some influence over the decision	<input type="checkbox"/>	TERMINATE
I am not involved in the decision	<input type="checkbox"/>	TERMINATE
Don’t know/refused (VOL)	<input type="checkbox"/>	TERMINATE

RECRUITMENT NOTE: THE PARTICIPANT DOES NOT NECESSARILY HAVE TO BE THE OWNER OF THE COMPANY. BUT THEY MUST HAVE A SIGNIFICANT ROLE IN DETERMINING HOW FEDERAL TAXES ARE PAID. IF THE PERSON BEING SCREENED DOES NOT MEET THE CRITERIA IN Q7, YOU MAY ASK TO SPEAK TO THE PERSON WHO IS THE PRIMARY DECISION MAKER AND RESCREEN THAT PERSON.

8 May I confirm your title?

CEO/President	<input type="checkbox"/>	
Owner	<input type="checkbox"/>	
CFO	<input type="checkbox"/>	
Financial Manager	<input type="checkbox"/>	
Other (RECORD)	<input type="checkbox"/>	

9 Which of the following best describes your company's technology capabilities?

You have both computer and Internet access	<input type="checkbox"/>	
You have a computer or computers but not Internet access	<input type="checkbox"/>	
You have neither Internet access nor a computer/computers	<input type="checkbox"/>	

10 And how long have you had a business with employees?

RECORD: _____

To make sure we are talking to a variety of people:

11 Please stop me when I reach the category that includes your age. [READ LIST.]

Under 18	<input type="checkbox"/>	TERMINATE
18-24	<input type="checkbox"/>	
25-34	<input type="checkbox"/>	
35-44	<input type="checkbox"/>	
45-54	<input type="checkbox"/>	
55-64	<input type="checkbox"/>	
65 or over	<input type="checkbox"/>	

12 Could you please tell me your main ethnic background or race?

White, Caucasian	<input type="checkbox"/>	
Black, African-American	<input type="checkbox"/>	
Hispanic, Latino/a	<input type="checkbox"/>	
Asian	<input type="checkbox"/>	
Other	<input type="checkbox"/>	

13 When was the last time, if ever, that you participated in a focus group study? (READ LIST.)

Within the past 6 months		TERMINATE
More than 6 months ago		CONTINUE
Never		

14 Sometimes participants are also asked to view or read materials and write out their answers on a questionnaire. Is there any reason why you could not participate?

Yes	1	TERMINATE
No	1	CONTINUE

NOTE: Terminate if respondent offers any reason such as sight or hearing problem, a written or verbal language problem, or a concern with not being able to communicate effectively.

INVITATION:

We would like to invite you to participate in a marketing research discussion group. The group will take 2 hours of your time and you will receive a cash gift of \$250. The discussion group will be held on _____ at _____ p.m. It will be held at _____.

Will you be available on _____ from _____ to _____ p.m.?

Yes	1	CONTINUE
No	1	TERMINATE

IF YES: CONFIRM DATE AND TIME, PROVIDE DIRECTIONS, REMIND ATTENDEE TO BRING EYEGLASSES OR HEARING AIDS IF NECESSARY. IF NO, THANK AND TERMINATE.