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SHUGOLL RESEARCH

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PEN0901

CIRCLE

April 11 - More Frequent User (5PM) 1

April 11 - Infrequent User (7PM) 2

April 12 - More Frequent User (11AM)

3

PENSION BENEFIT GUARANTY CORPORATION
RECRUITMENT SCREENER

RESPONDENT NAME: _____

PHONE NUMBER: _____

DATE RECRUITED: _____ RECRUITED BY: _____

DATE CONFIRMED: _____ CONFIRMED BY: _____

(RECRUIT 14 FOR A SHOW OF 8 TO 10 PER GROUP)

Hello, this is _____ from Shugoll Research, an independent research company, calling on behalf of the Pension Benefit Guaranty Corporation. May I please speak with _____(CONTINUE WHEN REACH NAME ON LIST)?

We are conducting focus groups with pension professionals who have registered for the Enrolled Actuaries Meeting at the Marriott Wardman Park Hotel in Washington, DC, in April, 2010. This is strictly research and absolutely no sales or fundraising effort is involved. I'd like to ask you a few questions.

Paperwork Reduction Act notice: This survey has been approved by the Office of Management and Budget under OMB Control No. 1212-0053 (expires 12/31/2012). By obtaining OMB approval and telling you about it, we're allowed to conduct this survey. Your participation is voluntary and should take about 8 minutes.



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Confidentiality: Your responses will be used by PBGC solely for customer service improvement and will be treated with the confidentiality provided by the Privacy Act and the Freedom of Information Act.

1. Are you still planning to attend the Enrolled Actuaries Meeting?

	<u>CIRCLE ONE</u>	
Yes	<u>1</u>	→(CONTINUE)
No	<u>2</u>	→(THANK AND
Don't Know	<u>3</u>	TERMINATE)

2a. Have you ever visited the Pension Benefit Guaranty Corporation's website, called PBGC.gov, for any purpose?

	<u>CIRCLE ONE</u>	
Yes	<u>1</u>	→(CONTINUE)
No	<u>2</u>	
Don't recall/Refused	<u>3</u>	→(THANK AND TERMINATE)

2b. How often do you visit PBGC.gov, the Pension Benefit Guaranty Corporation's website? Would you say (READ LIST)?

	<u>CIRCLE ONE</u>	
More than twice a year	<u>1</u>	→(RECRUIT FOR "MORE FREQUENT USER" GROUPS)
Twice a year or less often	<u>2</u>	→(RECRUIT FOR "INFREQUENT USER" GROUP)

3. Do you or your clients work with private pension plans insured by the Pension Benefit Guaranty Corporation?

	<u>CIRCLE ONE</u>
Yes	<u>1</u>
No	<u>2</u>
Don't Know	<u>3</u>



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4. Which of the following best describes your job title or function? (READ LIST. TRY TO RECRUIT A MIX)

CIRCLE
ONE

- | | |
|--|----|
| Third-party pension plan administrator | 1 |
| Benefits manager | 2 |
| HR manager/director | 3 |
| Consulting actuary | 4 |
| In-house actuary | 5 |
| Consulting attorney | 6 |
| In-house attorney | 7 |
| Consulting accountant | 8 |
| In-house accountant | 9 |
| Other (Specify _____) | 10 |

5. On a scale of "1" to "10," where a score of "10" means that the statement describes you extremely well and "1" means that the statement does not describe you at all, how well does the following statement describe you? (CIRCLE ONE NUMBER BELOW)

CIRCLE ONE NUMBER

	Describe		Does not							
	s		Describe							
	Extremel		<u>Well at</u>							
	y Well		<u>All</u>							
I feel comfortable expressing my opinion in a group	10	9	8	7	6	5	4	3	2	1



INTERVIEWER NOTE: 8 OR HIGHER MUST BE CIRCLED, OTHERWISE THANK AND TERMINATE

6. Thinking about your use of websites for professional purposes, for what specific reasons are you using these websites? (WRITE VERBATIM)



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NOTE TO INTERVIEWERS: IT IS EXTREMELY IMPORTANT THAT RESPONDENTS IN THIS STUDY BE ARTICULATE. IF RESPONDENT CANNOT OR WILL NOT EASILY GIVE A ONE TO TWO SENTENCE UNPROMPTED ANSWER IN WELL UNDERSTOOD ENGLISH, PLEASE TERMINATE.

RECORD GENDER (DO NOT ASK):

	<u>CIRCLE</u>
Female	1
Male	2

INVITATION

We will be conducting an informal group discussion to review the Pension Benefit Guaranty Corporation’s website, PBGC.gov, with several meeting attendees on April 11 and 12 at [time]_____ in the Marriott Wardman Park Hotel. The discussion will last about 90 minutes and will focus on how PBGC’s website can better meet the needs of pension professionals. Each participant will receive \$25 as a thank-you for participating.

Again, this is strictly research; no sales or fund-raising effort is involved, and your participation will not affect your dealings with PBGC. As part of the group discussion, participants might be asked to read written materials and write down their reactions. Is there any reason you would not feel comfortable participating in these activities?

	<u>CIRCLE</u>	
	<u>ONE</u>	
Yes	1	→(THANK AND TERMINATE)
No	2	→(CONTINUE)



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Are you willing to participate in the group discussion?

CIRCLE

ONE

Yes	1	→(GIVE ROOM LOCATION)
No	2	→(THANK AND TERMINATE)

The group discussion will also be videotaped for internal purposes only. Is there any reason you would not feel comfortable with this?

CIRCLE

ONE

Yes	1	→(THANK AND TERMINATE)
No	2	→(CONTINUE)

Thank you for your participation.