

**Treasury.gov**  
**Prototype Testing Draft Screener**  
**Updated September 30, 2010**

Record Gender: recruit a mix

Male

Female

NAME

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ADDRESS

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CITY/STATE/ZIP

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HOME PHONE

WORK PHONE

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FAX

E-MAIL

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RECRUITED BY

DATE

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CONFIRMED BY

DATE

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PROJECT OVERVIEW

**Treasury.gov**

- Phase 1: Recruit 10 remote prototype testing sessions for at least 8 to complete; recruit from a nationwide sample—Recruit no more than 3 respondents per state to ensure a solid geographic mix
- Phase 2: Recruit 10 remote prototype testing sessions for at least 8 to complete; recruit from a nationwide sample—Recruit no more than 3 respondents per state to ensure a solid geographic mix
- Target audience segments will include the following:
  - **Primary Target: General Public**
    - **Sub-targets to include**
      - Task-Driven Citizen
      - Interested Citizen
      - Informed Taxpayer
      - Individual Investor
      - Students and Teachers
      - Potential Treasury Employees

- **Optional target audience segments. The following optional targets may be included in the research if they also fall into one of the primary sub-target categories**

- Academic Economists and Researchers
- Financial Institution Analysts and Managers
- Business
- Small and / or Disadvantaged Business
- Large International Business
- Advocacy Groups
- Press / Media
- Government Affairs Professional
- State/Local Government Employees

And will represent a mix of ethnicity, employment status, gender, age, education level, U.S. born vs. foreign born and English as primary/secondary languages.

**Recruiting notes:**

Since we are testing prototypes creative, we will not be able to include any no/low vision 508 compliance respondents.

Recruiting activities will be compliant with national do not call list registry and list management.

**1. When was the last time, if ever, you participated in a market research study either at our facility or for another research company? (DO NOT READ)**

- |                             |   |            |
|-----------------------------|---|------------|
| a. Within the past 6 months | 1 | TERMINATE  |
| b. Longer than 6 months ago | 2 | ASK Q2a/2b |
| c. Never                    | 3 | SKIP TO Q3 |

**2a. How many market research group discussions have you ever participated in? \_\_\_\_\_**

**2b. How many market research one-on-one, in-depth interviews have you ever participated in? \_\_\_\_\_**

**3. Which of the following categories includes your age?** (READ) Recruit a mix.

- |             |   |           |
|-------------|---|-----------|
| a. Under 18 | 1 | TERMINATE |
| b. 18-24    | 2 | CONTINUE  |
| c. 25-34    | 3 | CONTINUE  |
| d. 35-45    | 4 | CONTINUE  |
| e. 45-54    | 5 | CONTINUE  |
| f. 55-64    | 6 | CONTINUE  |
| g. 65+      | 7 | CONTINUE  |

**4. Which of the following best describes your current residency status?** Recruit a Mix

- |                                    |   |           |
|------------------------------------|---|-----------|
| a. I am a U.S. Citizen             | 1 | CONTINUE  |
| b. I am a Naturalized U.S. Citizen | 2 | CONTINUE  |
| c. I am not a U.S. Citizen         | 3 | TERMINATE |

**5. What languages are spoken in your home?** \_\_\_\_\_ Recruit a mix of English only and bilingual households

**6. Are you a registered voter?**

- |        |   |          |
|--------|---|----------|
| a. Yes | 1 | CONTINUE |
| b. No  | 2 | CONTINUE |

**7. Do you use the internet?**

- |        |   |                      |
|--------|---|----------------------|
| a. Yes | 1 | CONTINUE             |
| b. No  | 2 | CONTINUE, SKIP TO 12 |

**8. If Yes, where do you access the internet?**

- |                                     |   |          |
|-------------------------------------|---|----------|
| a. Work                             | 1 | CONTINUE |
| b. Home                             | 2 | CONTINUE |
| c. Library                          | 3 | CONTINUE |
| d. Pay per use (e.g. internet café) | 4 | CONTINUE |

**9. On a scale from 1 to 10, where 1=not very comfortable and 10=very comfortable, how comfortable are you with using the Internet?** \_\_\_\_\_ (Recruit a mix.)

**10. Which of the following government websites have you ever visited? Note to recruiter: try to recruit at least 4 respondents who select G. Treasury.gov**

- |                    |   |          |
|--------------------|---|----------|
| a. IRS.gov         | 1 | CONTINUE |
| b. WhiteHouse.gov  | 2 | CONTINUE |
| c. Recovery.gov    | 3 | CONTINUE |
| d. Weather.gov     | 4 | CONTINUE |
| e. Census2010.gov  | 5 | CONTINUE |
| f. Data.gov        | 6 | CONTINUE |
| g. Treasury.gov    | 7 | CONTINUE |
| h. Other (specify) | 9 | CONTINUE |

The following questions are intended to ensure we get a wide variety of respondents represented in our research study.

**11. Which of the following tasks have you ever completed on a government website? That is conducted a search/completed tasks on a website ending with the domain extension, .gov?**

**Note to recruiter: Respondent must indicate at least 1 from A-I to continue.**

- a. Filed your own tax return online—**Continue as informed taxpayer**
- b. Looked for tax forms—**Continue as informed taxpayer**
- c. Looked for information on financial education to manage my money and help set financial goals —**Continue as individual investor**
- d. Searched for government auctions selling surplus, seized or forfeited cars or property. —**Continue as task driven citizen**
- e. Researched information on tax policy—**Continue as informed taxpayer**
- f. Purchased coins or paper money—**Continue as task driven citizen**
- g. Searched job opportunities and/or applied for a position with a Federal government agency—**Continue as job seeker**
- h. Researched the use of TARP funds—**Continue as individual investor**
- i. I have not conducted any task using a government website but I am open to it.—**Continue as general public quota**
- j. I have not conducted any task using a government website and I don't have any interest —**Terminate**

**12. Which of the following best describes your current work status or occupation? (READ)**  
Recruit a mix.)

- a. Professional/Executive/Owner
- b. White Collar/ Administrative/ Clerical
- c. Blue Collar/ Service/ Manufacturing
- d. Part Time Work Outside of the Home
- e. Stay at Home Full Time/Do Not Work
- f. Unemployed/Looking for Work
- g. Student—**recruit for student quota**
- h. Retired
- i. Other \_\_\_\_\_ (Record verbatim, do not read.)
- j. Do Not Know (Do not read.)
- k. Refused (Do not read.)

If A-D ask:

**13. What is your current job title? \_\_\_\_\_**  
(If teacher, include as part of the TEACHER quota)

**14. What is the name of your current employer? \_\_\_\_\_**

**15. Which of the following best describes your last level of education completed? (READ. Data collection purposes only.)**

- |                           |   |          |
|---------------------------|---|----------|
| a. No high school diploma | 1 | CONTINUE |
| b. High School            | 2 | CONTINUE |
| c. Associate's Degree     | 3 | CONTINUE |
| d. Bachelor's Degree      | 4 | CONTINUE |
| e. Masters Degree         | 5 | CONTINUE |
| f. JD/PhD/MD              | 6 | CONTINUE |
| g. Post Doctorate         | 7 | CONTINUE |

**16A. Are you of Hispanic or Latino origin?**

- a. Yes 1 CONTINUE
- b. No 2 CONTINUE

**16B. What is your race? Please select one or more.**

- a. White 1 CONTINUE
- b. Black or African American 2 CONTINUE
- c. Asian 3 CONTINUE
- d. Native Hawaiian or other Pacific Islander 4 CONTINUE
- e. American Indian or Alaska Native 5 CONTINUE

**17. For classification purposes only, please tell me into which of the following categories your TOTAL HOUSEHOLD income falls *before taxes*? (READ LIST. RECRUIT A MIX)**

- a. Under \$35,000 1 CONTINUE
- b. Between \$35,000 and \$49,999 2 CONTINUE
- c. Between \$50,000 and \$74,999 3 CONTINUE
- d. Between \$75,000 and \$99,999 4 CONTINUE
- e. Between \$100,000 and \$149,999 5 CONTINUE
- f. Over \$150,000 6 CONTINUE
- g. Refused 7 CONTINUE

**18. If you could work for a Federal government agency, which one would you want to work for and why? Please select up to 2 or 3. (Recruiter: ensure respondent is easy to understand and can articulate thoughts.)**

Invitation

We would like to invite you to participate in a remote prototype test regarding government websites on [insert date and time]. The session will last approximately 1 hour. For your participation we will pay you [insert incentive amount] Does this sound like something you would be interested in participating in?

- a. Yes.....**CONTINUE**
- b. No.....**TERMINATE**

I want to make it clear that this is neither a recruiting nor sales event. It is only for market research purposes to gauge your reactions to a government website

This is a remote prototype test. You will be able to log in from any computer with internet access using the minimum technical requirements:

**Requirements:**

- **Operating System:** Microsoft Windows 2000, Windows XP and Windows Vista\*
- **Web Browser:** Internet Explorer 5.0 or later, Firefox 1.0 or later
- **Hardware:** 400 MHz Pentium II, 256 MB RAM, 16 MB video card memory
- Enabling Java script is recommended

**Recruiter: confirm respondent's computer meets minimum requirements.**

We are investing a great deal of time and effort to coordinate this research study. Your participation and attendance is vital to the success of our study. If for any reason, you are unable to attend the focus group/usability testing session, please notify us in advance so we may find a replacement.

**Get mailing address, fax number or email address to send confirmation information.**

We are counting on your attendance. If an emergency does arise, it is *imperative* that you call us immediately at XXX as we will need to find your replacement as soon as possible. You will receive 2 calls confirming your attendance. The first call will be 3-4 days after you are recruited and we will need to re-ask you some of the screening questions. You will also receive a final call to confirm the day before your scheduled appointment. We do need to speak with you on each of these occasions, and we appreciate your prompt return calls.

Do you have any objection to us placing the 2 calls to confirm your information and attendance?

YES    TERMINATE

NO     CONTINUE

Send log-in information and instructions for remote prototype testing.