

FinancialStability.gov + Makinghomeaffordable.gov
Focus Groups + Usability Testing Draft Screener
Updated September 30, 2010

Record Gender: recruit a mix

Male

Female

NAME

ADDRESS

CITY/STATE/ZIP

HOME PHONE

WORK PHONE

FAX

E-MAIL

RECRUITED BY

DATE

CONFIRMED BY

DATE

PROJECT OVERVIEW

FinancialStability.gov

- Phase 1: Recruit 4 focus group; 12 for at least 8 to show per group
 - 2 groups per market based on the following schedule:
 - Boston: Monday, 8/23
 - Denver: Wednesday, 8/25

- Phase 2: Remote usability testing; Recruit 12 for at least 8 to complete (nationwide sample): 10/14 to 10/18

- Target audience segments will include:
 1. **Primary Target: General Public (Recruit 4)**
 - **Additional sub-targets to include (Recruit 8 but recruit a mix)**
 - Task-Driven Citizen
 - Interested Citizen
 - Informed Taxpayer
 - Individual Investor
 - Students and Teachers
 - Potential Employees

Note to recruiters: sub-targets are not mutually exclusive. Respondents may be more than 1 sub-target, e.g. interested citizen and an individual investor.

2. **Compliance officers who work for financial institutions:** the person responsible for making sure the financial institution is in compliance especially institutions who received TARP funds. **Recruit 1-2 if possible.**

Given the incentive amount and time commitment for this study, C2 will not be able to recruit bank executives for focus groups

All groups and remote one-on-one sessions will represent a mix of ethnicity, employment status, gender, age, education level, U.S. born vs. foreign born and English as primary/secondary languages. Recruit at least (1) 508 compliance targets per group for usability testing

Makinghomeaffordable.gov

- Phase 1: Recruit 4 focus groups; 12 for at least 8 to show per group
 - 2 groups per market based on the following schedule:
 - Boston: Tuesday, 8/24
 - Denver: Thursday, 8/26
- Phase 2: Remote usability testing; Recruit 12 for at least 8 to complete (nationwide sample): 11/1 to 11/3
- Target audience segments will include:
 - **Homeowners who are in distress, “under water” and either lost their home or may lose their home to foreclosure; looking for information on foreclosure prevention programs**

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. Recruit at least (1) 508 compliance targets per group for usability testing

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 |

If within the past 6 months, terminate

2. How many market research group discussions have you ever participated in? _____

3. How many market research one-on-one, in-depth interviews have you ever participated in? _____

If more than 3 focus groups or one-on-one interviews ever, terminate

4. 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 |

5. 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 |

6. What languages are spoken in your home? _____ Recruit a mix of English only and bilingual households

7. Are you a registered voter?

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

8. Do you use the internet?

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

9. 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 |

10. 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.)

11. Which of the following government websites have you ever visited?

- | | | |
|-----------------------------|----|----------|
| 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. Financialstability.gov | 8 | CONTINUE |
| i. Makinghomeaffordable.gov | 9 | CONTINUE |
| j. Other (specify) | 10 | CONTINUE |

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

Note to recruiters: Targets to include in the focus groups

- Day 1 in each market- Financialstability.gov: general public (2 groups)
- Day 2 in each market – Makinghomeaffordable.gov: homeowners (2 groups)

12. Do you currently...?

- a. Rent a home/condo/duplex/apartment/mobile home—continue for Day 1 groups only
- b. Own a single family home/condo/duplex/mobile home—Skip to Question 14 for Day 1 or 2 groups
- c. Live with family member—continue for Day 1 groups only

13. Which of the following tasks have you ever completed on a government website? That is conducted a search and 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**

Skip to question 16

Homeowners ONLY

14. 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?

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

15. In general, have you conducted any online searches on the following topics? Please respond Yes or No.

Note to recruiter: at least ½ of the MakingHomeAffordable groups should include homeowners in distress—those who say yes to C-F.

- a. I have looked for information on the COBRA health insurance continuation coverage subsidy
- b. I have looked into mortgage modification or refinancing programs
- c. I owe more on my house than what it is worth
- d. I am experiencing housing distress and looking for ways to avoid losing my home and restore a peace of mind
- e. I have lost my home due to foreclosure
- f. I have filed or have considered filing for personal bankruptcy protection

FOR ALL RESPONDENTS

16. 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
- 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:

17a. What is your current job title? _____

17b. What is the name of your current employer? _____

For financial institution respondents only ask 17c and 17d:

17c. Please describe your roles and responsibilities: _____

17d. Are you involved in compliance related reporting about TARP funds?

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

Continue for FinancialStability.gov

18. Which of the following best describes your last level of education completed?

- | | | |
|---------------------------|---|----------|
| 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 |

19A. Are you of Hispanic or Latino origin?

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

19B. 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

20. Which of the following best describes your marital status?

- a. I am single, never married
- b. I am single; divorced or separated
- c. I am married
- d. I live with a significant other or partner
- e. I am a widow

21. How many adults & children under < 18 years old live in your household? (Record Response. Recruit a mix)

22. For classification purposes only, please tell me into which of the following categories your TOTAL HOUSEHOLD income falls *before taxes*? (READ. 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 |

23. To ensure our research program is compliant with Section 508 of the Rehabilitation Act and accessible to all segments of the US population, please indicate which of the following applies to you:

(If possible—recruit at least 1-2 Section 508 compliant respondents for the usability testing—respondents may bring an aid to assist in session)

- | | | |
|----------------------|---|----------|
| a. No vision | 1 | CONTINUE |
| b. Low vision | 2 | CONTINUE |
| c. Hearing impaired | 3 | CONTINUE |
| d. Motor impairments | 4 | CONTINUE |
| e. Speech impairment | 5 | CONTINUE |
| f. Spinal impairment | 6 | CONTINUE |
| g. None of the above | 7 | CONTINUE |

INVITATION

We would like to invite you to participate in a paid market research study to discuss government websites. The research discussion is scheduled to last less than [insert time duration] and will take place on [insert date based on market]. For your participation we will pay you \$xxx. Does this sound like something you would be interested in participating in?

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

For usability recruiting only: 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. Please do not schedule yourself for this research if you feel that you are not going to be able to attend the focus group discussion/usability testing session. If an emergency does arise, it is **imperative** that you call us immediately at (877) 222-2909 Ext. xx as we will need to find your replacement as soon as possible. Since our clients expect our respondents to all show up for their research, and since it is necessary that we provide them with the most accurate information, you will be receiving 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?

a. Yes TERMINATE

b. No CONTINUE

For focus group recruiting only: You will also be videotaped for market research purposes only during this discussion. Do you have any objection to the use of video?

Thank you for your understanding and patience during these confirmation calls, and we look

a. Yes TERMINATE

b. No CONTINUE

If you wear glasses please be certain to bring with you to the session. forward to having you participate in this study!