

**FEDERAL RESERVE BANK
GO DIRECT MESSAGE TESTING FOCUS GROUPS
SOCIAL SECURITY CHECK RECIPIENT SCREENER**

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Recruiter: _____

February X; Opinion Center, Cleveland

	12 p.m.	Recruit 12 for 7 to 10 to show
	3 p.m.	Recruit 12 for 7 to 10 to show

February X; Dallas by Definition, Dallas

	12 p.m.	Recruit 12 for 7 to 10 to show
	3 p.m.	Recruit 12 for 7 to 10 to show

February X; Field Dynamics, Los Angeles

	12 p.m.	Recruit 12 for 7 to 10 to show
	3 p.m.	Recruit 12 for 7 to 10 to show

[ASK TO SPEAK TO SPECIFIC PERSON FROM THE SOCIAL SECURITY CHECK RECIPIENT SAMPLE LIST. NO OTHER PERSON IN THE HOUSEHOLD QUALIFIES FOR THE SURVEY.]

Hello. My name is _____ and I'm calling from KRC Research on behalf of the U.S. Department of the Treasury. We are an independent research firm working with the Department of the Treasury. This is NOT a sales call. We are conducting a research discussion group in your area of people who receive federal benefit payments from the Social Security Administration to help us better understand how the Social Security benefit payment system works for you.

Again, this call is for research purposes only. The Department of the Treasury is not interested in your name or in any specific details about you as an individual.

This research discussion group will be held on February X at (EXACT TIME) and last approximately 2 hours. The discussion will include about eight or nine other Social Security benefit recipients such as yourself. **Your participation is voluntary and will not affect the**

amount of your benefit payment. As a token of our appreciation for your time, you will receive \$75 for participating in the discussion group. Would you be available at that time? (IF NO, THANK THEM AND TERMINATE THE CALL.)

To make sure that we are reaching a variety of people, I have a few questions for demographic purposes only.

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 AS REQUIRED BY LAW 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: BARBARA BRUMLEY OF THE FEDERAL RESERVE BANK AT 314-444-4780.

1 RECORD GENDER:

Male	<input type="checkbox"/>	RECRUIT A MIX
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?	<input type="checkbox"/>	<input type="checkbox"/>
In marketing or opinion research?	<input type="checkbox"/>	<input type="checkbox"/>
In journalism or for the news media?	<input type="checkbox"/>	<input type="checkbox"/>
For the US Department of Treasury?	<input type="checkbox"/>	<input type="checkbox"/>
TERMINATE IF YES TO ANY OF ABOVE.		

- 3 I am going to read some statements that may or may not describe you. As I read each one, please tell me whether it describes you, or not really? (READ RESPONSES. ACCEPT ALL THAT APPLY.)

	YES	NO
You receive a Social Security payment for yourself	<input type="checkbox"/>	<input type="checkbox"/>
You receive a Social Security payment for someone else	<input type="checkbox"/>	<input type="checkbox"/>
PARTICIPANTS MUST RECEIVE A SOCIAL SECURITY PAYMENT FOR THEMSELVES TO QUALIFY. IF ANSWER IS "NO" TO FIRST CATEGORY ABOVE, TERMINATE.		

IF RESPONDENT ALSO RECEIVES A FEDERAL BENEFIT PAYMENT FOR SOMEONE ELSE READ: For the following questions, please answer only about your own federal benefit payment.

- 4 Do you currently have a checking or savings account?

Yes	<input type="checkbox"/>	CONTINUE
No	<input type="checkbox"/>	CONTINUE

- 5 Do you currently receive your Social Security payment as a paper check in the mail, directly deposited into your bank account, or through some other means? (DO NOT READ ANSWER CHOICES.)

Paper check	<input type="checkbox"/>	CONTINUE
Direct deposit	<input type="checkbox"/>	TERMINATE
The Direct Express card	<input type="checkbox"/>	TERMINATE
Some other way	<input type="checkbox"/>	TERMINATE
Don't know/refused (VOL)	<input type="checkbox"/>	TERMINATE

- 6 Who makes the decision on HOW you receive your payments? Do you make the decision yourself, make the decision along with someone else, or does someone else make the decision for you? (ACCEPT ONE RESPONSE.)

Make the decision yourself	<input type="checkbox"/>	CONTINUE
Make the decision along with someone else	<input type="checkbox"/>	CONTINUE
Someone else makes the decision for you	<input type="checkbox"/>	TERMINATE

7 What is your age? (RECORD.) _____

18-34	<input type="checkbox"/>	RECRUIT A MIX RECRUIT AT LEAST 2-3 PER GROUP
35-44	<input type="checkbox"/>	
45-54	<input type="checkbox"/>	
55-62	<input type="checkbox"/>	
62-85	<input type="checkbox"/>	
86+	<input type="checkbox"/>	TERMINATE
Don't know/refused (VOL)	<input type="checkbox"/>	TERMINATE

8 What is the last grade of school you have completed? (READ LIST. RECORD.)

Less than grade six	<input type="checkbox"/>	RECRUIT A MIX
Grade six to eight	<input type="checkbox"/>	
Some high school	<input type="checkbox"/>	
Completed high school	<input type="checkbox"/>	
Completed GED	<input type="checkbox"/>	
Some college or trade school	<input type="checkbox"/>	
Completed college	<input type="checkbox"/>	
Some post graduate or professional school	↑	
Don't know/refused (VOL)	↑	

9 Would you describe yourself as... (READ RESPONSES.)

	YES	NO
Hispanic or Latino	<input type="checkbox"/>	Go to 10
Prefer not to answer (VOL)	<input type="checkbox"/>	

10. Would you describe yourself as (READ RESPONSES. ACCEPT MULTIPLE ANSWERS)...

American Indian or Alaskan Native	<input type="checkbox"/>	RECRUIT A MIX
Asian	<input type="checkbox"/>	
Black or African American	<input type="checkbox"/>	
Native Hawaiian or other Pacific Islander	<input type="checkbox"/>	
White	<input type="checkbox"/>	
Don't know/refused (VOL)	<input type="checkbox"/>	

10 Approximately how many years have you been receiving your Social Security benefit payment?

Less than 1 year	TERMINATE
1-2 years	CONTINUE
3-5 years	
6 or more years	

- 11 When was the last time, if ever, that you participated in a marketing research study?
(READ LIST.)

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

- 12 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? If you need glasses to read, please remember to bring them.

Yes	↓	TERMINATE
No	↓	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 \$75. 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	↓	CONTINUE
No	↓	TERMINATE

IF YES: CONFIRM DATE AND TIME, PROVIDE DIRECTIONS. IF NO, THANK AND TERMINATE.