

July 15, 2016

NOTE TO THE
REVIEWER OF:

OMB CLEARANCE 1220-0141
“Cognitive and Psychological Research”

FROM:

Brandon Kopp
Research Psychologist
Office of Survey Methods Research

SUBJECT:

Submission of Materials for the Global
Questions Testing for the CE Recall and
Records Interviews

Please accept the enclosed materials for approval under the OMB clearance package 1220-0141 “Cognitive and Psychological Research.” In accordance with our agreement with OMB, we are submitting a brief description of the study.

The total estimated respondent burden hours for this study are 229.

If there are any questions regarding this project, please contact Brandon Kopp at 202-691-7514.

1. Introduction and Purpose

The Consumer Expenditure Survey (CE) provides data on the buying habits of American consumers, including both expenditures and income for the consumer unit. BLS is currently redesigning the CE with the goals of reducing both measurement error and response burden. In the redesigned CE, respondents will provide a wide range of expenditures, from monthly utility bills to irregular entertainment expenses, through the Recall interview, the Diary, and the Records interview.

The in-person Records and Recall interviews will require respondents to report their household's expenditures for a selected set of expenditure categories for the preceding three month period. To reduce the burden associated with the current CE interview, BLS is developing global questions that collect data at a higher level of aggregation (e.g., large appliances instead of washers, dryers, refrigerators, freezers, etc.) than data traditionally collected in the CE. Previous research (Crafts, et al., 2015; Edgar, 2011; Kopp, 2012; Kopp & Yu, 2013) on the global questions has revealed mixed results. The focus of this study is to develop and test global questions for the Records and Recall interviews with the objective of administering fewer questions than the current CE interview without sacrificing accuracy.

For the Records Interview, there are 20 global questions that encompass 126 item titles and for the Recall Interview, there are 24 global questions that encompass 87 item titles (see Attachment A). The global questions (column 3) represent a high level of aggregation and the item titles represent the individual items at a detailed level. The global questions consist of, or cover, a number of the item titles, thus requiring revisions to the original question wordings to ensure that the questions reflect all included items. Ultimately, this study will determine the level of aggregation and specific question wording that makes the most sense to the respondent and is the easiest to answer accurately. This study will also evaluate possible order effects and make recommendations when necessary.

Global questions will be modified through iterative rounds of cognitive testing and slight variations in wording will be tested. Westat will be conducting the cognitive testing on behalf of BLS.

2. Research Design

Westat will use cognitive interviewing techniques to gain an in-depth understanding of how test participants understand and answer the global questions. Cognitive testing will be conducted iteratively, through 10 rounds with 12 respondents per round for a total of 125 (5 in the last round). After completing each round of 12 interviews, Westat will analyze the data and with BLS input, revise the questions for the next round of testing.

The expenditure questions that will be initially tested are listed in a table format in Attachment A. As this is pretesting, we expect that modifications may be made during the course of the study based on initial interviews/sessions/groups. Although the goals of the testing, and overall design, will remain the same, findings from preliminary results may be used to improve the interview guide/ survey form / instrument. For each item category currently proposed to be collected within the redesigned Records and Recall interviews, Attachment A shows the initial wording for testing. The initial wording of the questions was developed through a process of reviewing the current CEQ questions, the specific items to be captured within each item category, and findings from previous studies, then applying methodologist judgment about wording.

The in-person cognitive interviews will be conducted in Westat's cognitive interviewing facility in Rockville and in similar facilities in Baltimore, MD and Gettysburg, PA (see table below). Westat staff who are experienced in cognitive testing methods will conduct a one-hour interview with each participant. The testing protocol is included in Attachment B. For each testing round, within each session, a participant will (1) report which expenditure questions they had expenditures for, and if applicable, the cost and month of the expenditure(s); (2) answer cognitive probes to elicit their understanding of the questions; and (3) complete an activity to name items that belong to the expenditure categories being collected.

Testing Round	Anticipated Start Date
Round 1 (Rockville)	September 5, 2016
Round 2 (Baltimore)	September 26, 2016
Round 3 (Gettysburg)	October 17, 2016
Round 4 (TBD)	November 7, 2016
Round 5 (Rockville)	November 28, 2016

Testing Round	Anticipated Start Date
Round 6 (Baltimore)	December 12, 2016
Round 7 (Gettysburg)	January 2, 2017
Round 8 (TBD)	January 16, 2017
Round 9 (Rockville)	February 6, 2017
Round 10 (Baltimore)	February 27, 2017
Round 11 (Rockville) (n = 5)	March 13, 2017

Given the time constraint of one interview hour per participant, we have developed a plan to cover all expenditure questions within the interview rounds. We have formed 8 “clusters” – groups of expenditure questions that will be tested together. These clusters are:

Cluster	Number of Questions in Cluster	Global Expense Category Name
A	8	Renovation, repair, remodeling and additions to home
B	5	Rental or purchase of vehicle, and finance charges
C	2	Childcare costs and tuition (not college), tutoring, test prep, and all other school-related expenses
D	3	Vehicle maintenance, repair, and registration
E	2	Health insurance
F	6	Rental of household, lawn, garden or office-type equipment or electronics including TV and sound equipment
G	2	Purchase, rental or repair of sports or exercise equipment
H	5	Home decoration and furnishings
I	6	Apparel, watches and jewelry
J	5	Mass transit, vehicle rental on trip, veterinarian, alcohol expenses on trip

We anticipate testing the questions in each cluster in the testing rounds as shown in the following table. These cluster assignments are provided as Column 1 in Attachment A to indicate planned question coverage per testing round. Clusters to be tested in later rounds will be determined based on the results from earlier rounds, including decisions of whether question wordings need to be re-tested.

Testing Round	Possible Cluster Combinations	Item Count
Round 1 (Rockville)	Clusters A and E and H	15
Round 2 (Baltimore)	Clusters B and C and J	12
Round 3 (Gettysburg)	Clusters D and F and G and I	17
Round 4 (TBD)	TBD	
Round 5 (Rockville)	TBD	
Round 6 (Baltimore)	TBD	
Round 7 (Gettysburg)	TBD	
Round 8 (TBD)	TBD	
Round 9 (Rockville)	TBD	
Round 10 (Baltimore)	TBD	
Round 11 (Rockville)	TBD	

As we progress through the testing rounds and revise the questions, we will move from spending time on in-depth probing about a subset of expenditure questions to covering more of the total number of expenditure questions within each interview.

3. Participants

A total of 125 participants will be recruited for this study.

Participants will be recruited by the following four methods (see Attachment C for example text of ads, flyers, and emails). Each method will provide a Westat toll-free study phone number and an email address.

- (1) For recruiting at Westat’s Rockville location: Contact potential participants from within Westat’s research volunteer database. Westat will email a short description about the study and invite interested persons to reply to the email or call the study phone number (to leave a message with their name and phone number).
- (2) For recruiting at Westat’s Rockville location: Post flyers in locations that have bulletin boards and announcements of opportunities and events, such as community centers, libraries, and stores. The flyers will provide the study email address and the study voicemail number (to leave a message).
- (3) For all locations: Place Craigslist ads with general text about a range of types of expenditures, or text targeting a specific desired mix of expenditures and/or demographic characteristics. These ads will provide the study email address and the study voicemail number (to leave a message).

- (4) For non-Rockville locations: Place an ad in a local newspaper, using either general text about a range of types of expenditures, or text targeting a specific desired mix of expenditures and/or demographic characteristics. These ads will provide the study email address and the study voicemail number (to leave a message).

A Westat recruiter will monitor the emails and voicemail messages as they come in. She will call the individuals to complete the screening questions by phone or provide the link to the screener survey for those who prefer online screening. Attachment D provides the screening questions. Note that although Westat will collect several forms of personally identifiable information (PII; name, phone number, and either email or physical address), the online screening survey will be hosted on a secure Westat server¹. The PII will be collected so that Westat can contact and schedule participants whose screener responses indicate they are eligible to participate.

From the database of screener responses, Westat will aim to select participants with varying levels of education, income, and gender, as well as varied household compositions. History of recent purchases made within the expenditure categories designated for each round of testing will be considered in selecting and scheduling participants at each of the locations.

4. Burden Hours

The total burden for recruiting and conducting the cognitive interviews is estimated to be 229 hours.

Our expectation is that over the course of the testing rounds, we will need to recruit and screen more individuals than we will actually end up testing, since many individuals will not have expenditures in categories of interest to us. We estimate that approximately five times the total number of participants, or approximately 625 people, will need to be screened to find individuals who have an expenditure profile that will be relevant for the study. Based on an estimate of 10 minutes per person to complete the online survey screener or complete the telephone screener (administered by a recruiter), we estimate the

¹ Westat will only collect contact information from the online screener and schedule an interview for those identified as eligible.

burden hours for recruitment to be 104 hours. Across all rounds of testing, we will conduct 125 hour-long cognitive testing sessions for an additional 125 burden hours.

Phase	Number of Participants	Duration	Total Burden
Recruitment	625	0.17 hours	104 hours
Testing	125	1.00 hour	125 hours
TOTAL			229 hours

5. Payment to Respondents

A \$40 incentive will be provided to all participants participating in this study².

6. Data Confidentiality

Participants will be informed as to the voluntary nature of the study. Participants will also be informed that the study will be used for internal purposes to improve the design of a national Consumer Expenditure Interview Survey. Participants will be given a consent form to read and sign (see Attachment E). Information related to this study will not be released to the public in any way that would allow identification of individuals except as prescribed under the conditions of the Privacy Act Notice.

Attachments:

Attachment A: Questions To Be Tested

Attachment B: Cognitive Interview Protocol

Attachment C: Example Text For Ads

Attachment D: Screening Script/Questionnaire

Attachment E: Consent Form

² Westat will track recruitment success metrics. If it appears that recruitment would be improved by a higher incentive, BLS will contact OMB (through BLS's PRA representative), provide the recruitment data, and request a \$60 incentive. Brandon Kopp discussed this possibility with Robert Sivinski and Nora Kincaid (email correspondence, March 14th, 2016)

Attachment A: Questions to be Tested

Item Categories and Initial Wording for Testing

For each of the categories in the table on the next page, participants will be asked in the interview whether they have had the expense and, if they have, what they paid. The wording below shows the possible question stems that will be used with the categories. The question stem used will depend on the data needs of the category being tested.

1 (purchased)

Since the first of [the reference month], have you or any members of your household purchased ...

2 (purchased or rented)

Since the first of [the reference month], have you or any members of your household purchased or rented ... [for your household or for someone outside of your household]

3 (purchased, for own household or someone outside of household)

Since the first of [the reference month], have you or any members of your household purchased, either for members of your household or for someone outside your household, ...

4 (had expenses for)

Since the first of [the reference month], have you or any members of your household had expenses for...

5 (had expenses, either for own household or someone outside of household)

Since the first of [the reference month], have you or any members of your household had expenses, either for you or any members of your household or for someone outside your household, for... (note this is very long and awkward but corresponds to the wording in the CEQ that introduces a list of items:

Since the first of the reference month, have you or any members of your household had expenses for any of the following, either for you or any members of your household or for someone outside your household?

6 (Trips -- spend anything)

How much did you or any members of your household spend for ... other than what the package deal covered?

[for all costs except for transportation]: What costs, including taxes, won't be reimbursed?

Cluster	Question Number	Lead-in Number	Question Wording For Testing³
A	1	2	Dishwasher, garbage disposal, or range hood?
A	2	4	Paneling, roofing, siding, patios, walkways, gutters, windows, awning, etc.
A	3	4	Material for patio, masonry, etc.?
A	4	4	Heating, cooling, or electrical work, labor, or materials?
A	5	4	Other repair or maintenance including labor and materials?
A	6	4	Maintenance or repair of other property?
A	7	1	Construction materials for jobs not yet started?
A	8	4	Materials for remodeling, maintenance, or repair, etc.?
B	9	4	The rental of an RV, boat, or camper?
B	10	4	The rental of any vehicle: a car, truck, motorcycle, or plane?
B	11	1	An RV, boat, trailer, or plane?
B	12	n/a	Was any portion of the purchase price financed?
B	13	n/a	How did you dispose of the recreational vehicle?
C	14	4	Tuition (not college), tutoring, test prep, and all other school-related expenses?
C	15	4	Day care, nursery, or preschool expenses including tuition?
D	16	4	Oil change and tune-up?
D	17	4	All other vehicle maintenance and repair?
D	18	4	Vehicle registration?
E	19	n/a	How much [do you/does your household] currently spend for your health insurance plan [including payroll deductions]?
E	20	n/a	Do you or any members of your household have any other types of health insurance?
F	21	4	Rental of small household equipment?
F	22	4	Purchase of tools?
F	23	4	Rental or repair of tools, lawn or garden equipment?
F	24	4	Rental of office equipment for non-business use?
F	25	4	Rental or repair of VCR, TV, radio, or sound equipment?
F	26	4	Installation or repair of computers?
G	27	4	Purchase of sports or exercise equipment?
G	28	4	Rent or repair of sports equipment?
H	29	1	Any window coverings?
H	30	3	Living room furniture?
H	31	3	Wall units, cabinets, occasional furniture?
H	32	3	Bedroom furniture?
H	33	3	Lamps and household decorative items?
I	34	3	Suits or tailored jackets?
I	35	3	Women's tops or suits?
I	36	3	Girls' dresses or suits?
I	37	3	Boys' suits, sportcoats, or vests?
I	38	5	Rented clothing or storage outside the home?
I	39	5	Watches or jewelry?
J	40	5	Photography-related things?
J	41	5	Pet-related services including veterinarian services?

³ As noted in the text above, the wording in this table serves as an initial starting point. Question wording may change in later rounds of testing.

Cluster	Question Number	Lead-in Number	Question Wording For Testing
J	42	n/a	Do you or any members of your household use mass transportation services such as bus, subway, or train for commuting or trips?
J	43	6	Rental of vehicles on out-of-town trips?
J	44	6	Alcoholic beverages on out-of-town trips?

Attachment B: Cognitive Testing Protocol

I. Introduction

Thank you for taking the time to help us out today. My name is [and this is my colleague () who will be taking notes for us today. We also have () from the Bureau of Labor Statistics who is observing the session.]

II. Purpose and Consent Procedure

First, I'll give you a little background about what we'll be doing.

I will be asking you a series of questions from the Consumer Expenditure Survey, an ongoing survey that BLS conducts. The survey provides information about the buying habits of American consumers. This information is used for a lot of things, but its primary purpose is to help calculate inflation.

I'll be asking you to answer the questions and share your reactions to them. The purpose of this session is to find out what you think each question is asking about, and how easy or hard it is to answer. We are not evaluating you. We are looking to improve the questions, so there are no right or wrong answers. All the information you give us will be kept completely confidential, and will be used to improve the survey questions.

Please read this consent form, and I'll answer any questions you may have. [ANSWER QUESTIONS, IF ANY.] Please sign the form.

[START RECORDER AND GET ORAL PERMISSION TO RECORD; WHICH RECRUITER EXPLAINED AT TIME OF SCHEDULING CALL.] With your permission, I would like to record the interview in case I miss anything while taking notes. Do you give your permission to participate in this interview and to be recorded?

Do you have any [other] questions before we begin?

General Probes, etc.

If a participant asks "What does that mean?" "Does that include...?" etc.:

[Neutral responses]:

- "What does it mean to you?"
- "Whatever it means to you."
- "What do you think it includes?"
- "Whatever you think it includes."

If a participant hesitates for long time or says nothing when a response is needed:

- What are you thinking about here?

If a participant doesn't know what cost to report:

- Your best estimate is fine.

If a participant appears to be waffling/having trouble:

- What makes it hard to [decide/answer]?

If a participant asks whether a certain item qualifies for reporting for an expenditure question:

- [There are no right or wrong answers.] What do you think?

If a participant goes into excruciating detail when giving details for items, costs OR has trouble remembering specifics:

- [Can you describe for me] **how** you would figure this out?
- **How** would you figure out what to say -- for what you [bought/paid for], and how much it cost?

For questions with no "name 5" activity (and no judgment or list to show):

"Did talking about various travel expenses for the past three months remind you of [any / other] trip-related expenses for [question wording]?"

[INTERVIEWER: GO THROUGH THE FOLLOWING SECTIONS III – V BASED ON THE CLUSTERS OF EXPENDITURE QUESTIONS DESIGNATED FOR TESTING IN THE PARTICULAR TESTING ROUND]

III. Expenditure Questions: If Applicable, Total Expenditures (REPORTING ACCURACY)

- FOLLOW ASSIGNED CLUSTER ORDER.
- ASK EVERY EXPENDITURE QUESTION DESIGNATED FOR CLUSTERS IN TESTING ROUND, TO DETERMINE APPLICABLE EXPENDITURES.

1. Since the first of [the reference month 3 months prior], have you or any members of your household [FILL ADVANCE TEXT] [FILL QUESTION WORDING]?

[FOR ANY "YES ANSWER]; RIGHT AWAY ASK:

- a. How much did you spend? [We're now asking for one total across the three months]

IV. Details for Expenses (REPORTING ACCURACY AND ESTIMATION ACCURACY)

- A. [START BACK WITH P'S FIRST YES AND GO THROUGH **EACH YES**, ONE AT A TIME]. ASK:

1. You said you [or others in your household] spent money on [FILL].

- a. What was **one [item you (others) bought?/thing you (others) spent money on on/expense you (others) had]?**
- b. How much did it **cost**?
- c. In what **month** was it [bought/paid for]?

2. Any other items?

[IF YES, REPEAT a. – c. UNTIL PARTICIPANT HAS NO MORE ITEMS TO REPORT FOR QUESTION]

- a. What was **another [item you (others) bought?/thing you (others) spent money on on/expense you (others) had]?**
- b. How much did it **cost**?
- c. In what **month** was it [bought/paid for]?

Etc. for item(s) 3 - X

B. Was there anything you thought of, but decided not to [include/say] for [FILL]?

[IF YES]:

1. Can you say more about why you decided not to mention [FILL]?

- a. What was **one item** [you/others spent money on]?
- b. How much did it **cost**?
- c. In what **month** was it [bought/paid for]?

2. Any other items?

[IF YES, REPEAT a. – c. UNTIL PARTICIPANT HAS NO MORE ITEMS TO REPORT FOR QUESTION]

- a. What was **another [item you (others) bought?/thing you (others) spent money on on/expense you (others) had]?**
- b. How much did it **cost**?
- c. In what **month** was it [bought/paid for]?

[IF NEEDED] Etc. for item(s) 3 – X

Part B may be difficult for respondent. Move on quickly if respondent cannot answer readily.

V. Comprehension

A. Name Some Examples

[FOR ASSIGNED EXPENDITURE QUESTIONS, SEE HOW MANY THE RESPONDENT CAN PRODUCE], ASK ALL RESPONDENTS

1. Can you think of some examples of expenses for... [FILL]?
2. What else can you think of that would belong in this category?
3. Anything else?
4. Write down the examples of the global expense category that R can think of.
5. These can be either things you have bought or have never bought before.

[FOR EACH EXPENDITURE REPORTED]

B. Recheck of Expenditures Reported in III

1. Check both number of items and reported cost of each item.
2. Note any under or over reporting of both:
 - a. Number of expenditure items
 - b. Cost of expenditure items
3. PROVIDE RESPONDENT WITH LIST OF IN-SCOPE EXPENDITURE TYPES. PROBE ON ANY REPORTING (E.G., MISSED EXPENDITURES) OR ESTIMATION ERRORS [TRY TO ELICIT CAUSE SO WE CAN DETERMINE IF IT WAS A RECALL, COMPREHENSION, OR OTHER ISSUE]
Can you say more about that?
 - a. What was the **[item you (others) bought?/thing you (others) spent money on on/expense you (others) had]**?
 - b. How much did it **cost**?
 - c. In what **month** was it [bought/paid for]?
4. Any other items/things?

[IF YES, REPEAT a. – c. UNTIL PARTICIPANT HAS NO MORE ITEMS TO REPORT AS PREVIOUSLY NOT REPORTED]

VI. Closing

We appreciate your help today. Thank you for your time.

[PROVIDE THE \$40 INCENTIVE.]

Attachment C: Example Text for Ads

Email to members of Westat's Volunteer Database

The Bureau of Labor Statistics is exploring ways to better measure how Americans spend their money. Participants in this study will work with some questions from the Consumer Expenditure Survey, an ongoing survey that provides information about the buying habits of American consumers.

To determine if you are eligible to participate in the study, we will ask you to answer a few background questions about yourself. You can do this either on the phone or by completing a short online survey. This step will take about 10 minutes.

If you are eligible for the study, we will ask you to participate in a 60-minute interview. During the interview, we will go through questions from the survey, get your reactions to them, and ask you about various types of purchases. Your input will help to identify ways to improve the survey questions.

If you are interested in participating, please either:

- (1) Send an email to consumerexpenditure@westat.com; with "Consumer Expenditure Survey" in the subject line, with your name, telephone number, and the best time to reach you by phone,

or

- (2) Call the voicemail line at 1-866-978-9431, mention "Consumer Expenditure Survey" and leave your name, telephone number, and the best time to reach you.

Craigslist and Newspaper Ad Example

Survey Research- Receive \$40

Date: [FILL]

Westat, a social science research company, needs adults age 18 and over to participate in an interview about household spending. The interview will take place in [Name of Venue]. The interview will last about 60 minutes, and you will receive \$40. If you are interested, please either:

- (1) Send an email to consumerependiture@westat.com with your name, telephone number, and the best time to reach you by phone, or
- (2) Call the voicemail line at 1-866-978-9431 and leave your name, telephone number, and the best time to reach you.

Not everyone will be eligible to participate as we are interested in some specific purchase types, for example, spending on home repairs, appliances, automotive, clothing, tools, recreation, and more. We will contact you to determine if you are and if so will schedule an interview during [dates at that venue]. If you have questions about the study, please call 1-866-978-9431.

WESTAT
EOE

INTERESTED IN EARNING \$40? PARTICIPANTS NEEDED FOR IN-PERSON INTERVIEW

Westat, a research organization located in Rockville, Maryland, is seeking adults to take part in a 60-minute in-person interview to review survey questions for a large national survey. Eligible participants must be age 18 or over [and] *[other conditions specific to expenditure categories or demographic characteristics may be targeted/adjusted before each testing round]*.

If you meet these conditions, either:

(1) Send an email to consumerexpenditure@westat.com; with “Consumer Expenditure Survey” in the subject line, with your name, telephone number, and the best time to reach you,

or

(2) Call the voicemail line at 1-866-978-9431, mention “Consumer Expenditure Survey” and leave your name, telephone number, and the best time to reach you.

WESTAT

EOE

Attachment D: Screening Script/Questionnaire

Thank you for your interest in our study. We need people to participate in an interview about things they have spent money on over the past 3 months. We are first going to ask you some questions about yourself since we need to make sure that we include people with varying backgrounds. This will only take a few minutes.

1. What is your age?

|_|_|_|
AGE

IF AGE 17 OR YOUNGER.....(GO TO END STATEMENT ABOUT INELIGIBILITY DUE TO AGE)

AGES 18+ (GO TO 2)

NO NEED TO ASK IF OBVIOUS:

2. Are you male or female?

Male.....1

Female.....2

3. Are you of Hispanic, Latino, or Spanish origin?

YES.....1

NO.....2

4. What is your race? Please select one or more.

White..... 1

Black or African American..... 2

Asian..... 3

Native Hawaiian or other Pacific Islander... .. 4

American Indian or Alaska Native 5

5. What is the highest level of education you have completed?

1st - 8th grade, some high school, but not a diploma.....1

12 grade/high school diploma or GED..... 2

Some college, Associate's degree 3

Bachelor's degree4

Master's degree or higher.....5

6. What is your marital status?

Single.....1

Married2

Divorced.....3

Separated.....1

Widowed.....1

A member of an unmarried couple.....1

7. Do you live alone?

YES.....1 (GO TO Question 9)

NO.....2

8. In your household...

a....How many other adults age 18 or older are there, besides you?

_____ (number)

b. ...How many children under the age of 2 are there?

_____ (number)

c. ...How many other children between the ages of 2 and 18 are there?

_____ (number)

9. We are interested in identifying participants who have had made some of these purchases, but not others. In the last 3 months, **have you [or anyone in your household] purchased...**

[List of expenditure categories with “common wording” and lures goes here, with Yes/No answer choices for each]

10. What is your income – above \$50,000 or below \$50,000?

Below \$50,000.....1

Above \$50,0002

Rather not say.....3

IF ELIGIBILITY CRITERIA MET CONTINUE WITH 11
ELSE, IF DETERMINED NOT ELIGIBLE SKIP TO E2 (INELIGIBLE STATEMENT)

11. What is your name? _____

12. What is your address? _____

13. What is your e-mail address?_____

14. What is your phone number? _____

We will be conducting interviews in [TESTING LOCATION, NAME AND ADDRESS OF FACILITY] during the days of [FROM WHEN TO WHEN]. Would you be available to meet at that location for a one-hour time slot on one of those days?

YES.....1

NO.....2 [Thank you for your interest. {IF EARLY ROUND} We will be conducting interviews at that location again within the next few months. Would you be available to meet at that location for a one-hour time slot in the future?

YES.....1

NO.....2

Where did you see our ad for volunteers?

E1. IF ELIGIBLE, AND DESIRABLE FOR SCHEDULING: It appears you are eligible for our study. We'd like to schedule you at XXXX. Let me read you the days and times I have available, and you can tell me what would be best for you. This will take about 1 hour of your time and we will pay you \$40 cash. [We will send directions to the venue to you at [VERIFY -- FROM SCREENER SURVEY -- THE FULL NAME AND EMAIL OR REGULAR ADDRESS]. (It will include a map that shows you exactly where the room is).

I will send the directions out to you shortly. If you have to cancel your interview, please call back so that we can schedule someone in your place, OK? You can reach me at: [Recruiter's Phone Number].

If you have any friends, relatives or acquaintances -- who do not live with you -- who would be interested in participating, please give them our contact information: consumerexpenditure@westat.com or call **1-866-978-9431**.

E2. IF NOT ELIGIBLE: Thank you so much for answering our questions. It appears that you are not eligible for our study. Thank you very much for your interest and willingness to help out.

If you have any friends, relatives or acquaintances who do not live in your household, and you think that they would be interested in participating, please give them our contact information: consumerexpenditure@westat.com or call **1-866-978-9431**.

Attachment E: Consent Form

OMB Control Number: 1220-0141

Expiration Date: April 30, 2018

CONSENT FORM

The BLS, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act of 2002 (Title 5 of Public Law 107-347) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent. The Privacy Act notice on the back of this form describes the conditions under which information related to this study will be used by BLS employees and agents.

During this research you may be audio and/or videotaped, or you may be observed. If you do not wish to be taped, you still may participate in this research.

We estimate it will take you approximately 60 minutes to participate in this research

Your participation in this research project is voluntary, and you have the right to stop at any time. If you agree to participate, please sign below.

Persons are not required to respond to the collection of information unless it displays a currently valid OMB control number. The OMB control number is 1220-0141 and expires April 30, 2018.

I have read and understand the statements above. I consent to participate in this study.

Participant's signature

Date

Participant's printed name

Researcher's signature

PRIVACY ACT STATEMENT

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