

## Appendix B. Focus Group Eligibility Assessment

### HUD's Pre-Purchase Homeownership Counseling Demonstration

Name of Recruiter: \_\_\_\_\_

Date: \_\_\_\_\_

Name of Study Participant: \_\_\_\_\_

Information from RAST:

1. Study ID Number: \_\_\_\_\_
2. Site: \_\_\_\_\_
3. Group Status (Circle One): In-Person Group/Remote Group
4. Random Assignment Date: \_\_\_\_\_
5. Housing Counseling Intervention Status (Circle One): None / Partial / Complete
6. Housing Counseling Agency: \_\_\_\_\_
7. Date Housing Counseling Completed: \_\_\_\_\_
8. Referring Lender: \_\_\_\_\_
9. Has purchased home at RA (Circle One): Yes / No

#### **Introduction:**

“Hello my name is \_\_\_\_\_. I’m calling from Abt Associates on behalf of HUD’s First-time Homebuyer Study. May I please speak to [INSERT RESPONDENT NAME]?”

IF NECESSARY, READ: “(INSERT RESPONDENT NAME) agreed to help us with a study. I’m calling about an opportunity related to this study.”

IF RESPONDENT IS NOT AVAILABLE, COLLECT INFORMATION ON BEST TIME TO CALL BACK.

NOTE TIME TO CALL BACK: \_\_\_\_\_

IF RESPONDENT IS AVAILABLE, CONFIRM THAT THEY ARE A STUDY PARTICIPANT:

“Thank you for talking with me. Am I correct that you recently participated in a study of first-time homebuyer education and counseling?”

IF THEY SAY NO OR DON'T RECALL:

FOR REMOTE GROUP PARTICIPANTS: “This was a study where you were offered the opportunity to complete homebuyer education modules on-line and receive homebuyer counseling over the telephone. Does this sound familiar?”

FOR IN-PERSON GROUP PARTICIPANTS: “This was a study where you were offered the opportunity to attend a homebuyer education workshop and to receive homebuyer counseling at a housing counseling agency. Does this sound familiar?”

IF NO:

“Is there anyone else with the same name or someone else at this address who might have participated?”

IF NO:

“Thank you for talking with me and I’m sorry that we seem to have the wrong information. I appreciate your time. Goodbye.”

IF YES:

“Recently we sent you a letter saying we would be calling to find out if you would be willing to participate in a small focus group to discuss your experience in the study and as a first time homebuyer. Did you receive that letter?”

IF YES:

“Good! As it explained, we are organizing a focus group of study participants in the [INSERT SITE NAME] area.”

IF NO:

“The letter explained that we are organizing a focus group of study participants in the [INSERT SITE NAME] area.”

CONTINUE BELOW:

“You will receive a \$60 gift card that can be used almost anywhere to thank you for your time. All the information we collect will be confidential. The focus group will be held in the evening and last for roughly two hours. You will be in a group of 8 to 10 study participants. A group leader will ask a set of questions to start an informal conversation. We want to hear from all study participants, including both those who bought a home and those who haven’t. We also want to hear from people who received homeownership education and counseling services and those who didn’t. Participation in the focus group is voluntary. There are no penalties, now or in the future, should you decide not to participate. Would you be willing to participate?”

- Continue
- Refused

IF REFUSED:

“Again, you would be given a \$60 gift card for your time and we would love to have you participate because your opinions and feedback are important to us. Would you be willing to help us out?”

IF STILL REFUSES:

“Thank you for your time. Should you change your mind, let me give you a number that you can call. It is the toll-free study hotline at 1-855-207-6262. Would you like for me to repeat that for you? I appreciate the time you’ve taken in talking with me.”

IF YES:

“Great! Now I need to ask you a few quick questions to help us assign you to the right focus group. This should take no longer than 5 minutes.

1. “Your focus group will be held in [INSERT SITE NAME]. Are you still living in [INSERT SITE NAME] or close by?”

- a. YES – CONTINUE TO Q2
- b. NO –

“Since your focus group will be held in [INSERT SITE NAME], if it’s not practical for you to travel there then I want to thank you for talking with me and appreciate your time.”

2. “Now I need to confirm the information we have about your participation in the homebuyer services you were offered. You were offered two kinds of services.

FOR REMOTE GROUP PARTICIPANTS: “The first service was on-line homebuyer education where you had the opportunity to learn about different topics related to home purchase and home ownership. The second service was one-on-one homebuyer counseling over the telephone.

Our records show that you ...” READ THE OPTION BELOW THAT CORRESPONDS TO THE INFORMATION FOR THIS PARTICIPANT:

- a. COMPLETE: “Completed all of the on-line homebuyer education and participated in the individual telephone counseling.”
- b. PARTIAL: “Completed some of the homebuyer education and telephone counseling but not all of it.”
- c. NONE: “Did not participate in either the on-line homebuyer education or the individual counseling.”

FOR IN-PERSON GROUP PARTICIPANTS: “The first service was a group homebuyer workshop where you had the opportunity to learn about different topics related to home purchase and home ownership. The second service was one-on-one homebuyer counseling at the housing agency.

Our records show that you ...” READ THE OPTION BELOW THAT CORRESPONDS TO THE INFORMATION FOR THIS PARTICIPANT:

- d. COMPLETE: “Completed all of the homebuyer workshop and the individual counseling.”
- e. PARTIAL: “Completed some of the homebuyer education and individual counseling but not all of it.”
- f. NONE: “Did not participate in either the homebuyer workshop or the individual counseling.”

3. “Is this correct?”

IF YES, UPDATE STATUS BELOW AND THEN GO TO QUESTION 4

If NO, ASK:

Please describe what homebuyer education activities have you completed, if any?

---



---

Please describe what homebuyer counseling activities have you completed, if any?

---



---

“Thank you. I’ve made a note of what you’ve told me.”

BASED ON THE INFORMATION FROM THE STUDY PARTICIPANT, EITHER CONFIRM OR RECLASSIFY THE PARTICIPANT’S INTERVENTION STATUS AS FOLLOWS:

“**COMPLETE**” = COMPLETED HOMEBUYER WORKSHOP AND AT LEAST ONE INDIVIDUAL COUNSELING SESSION

“**PARTIAL**” = STARTED BUT DID NOT COMPLETE HOMEBUYER WORKSHOP AND/OR DID NOT COMPLETE AT LEAST ONE INDIVIDUAL COUNSELING SESSION

“**NONE**” = NO ACTIVITIES STARTED INCLUDING REGISTERING BUT NOT SHOWING UP OR GETTING THROUGH THE FIRST MODULE

UPDATE HOUSING COUNSELING INTERVENTION STATUS:  
**(CIRCLE ONE): NONE / PARTIAL / COMPLETE**

4. “Our records also show that, since the time you enrolled in the study, [you have/have not] purchased a home. Is that correct?”

IF YES, GO TO QUESTION 5 (QUALIFIES FOR HOMEOWNERSHIP AT RA)

IF NO: “Could you please describe where you are in the home buying process?  
PLEASE CHECK ONE OF THE FOLLOWING:

- a. I am in the process of purchasing a home
- b. I am still looking for a home
- c. I am not interested in buying a home at this time
- d. I don’t know
- e. Refused

#### **Collection of Contact Information**

5. “Thank you very much for your time. We are almost done. The next step is that, based on the information you provided, we’re assigning you to a focus group on [INSERT DATE] at [INSERT TIME] at [INSERT GROUP LOCATION]. Will that date and time work for you?”

IF NO:

“I’m sorry that this time doesn’t work for you. If your availability changes, you can let us know by calling the toll-free study hotline number at 855-207-6262, and we will see if there is a spot open for you. Even though you aren’t able to participate in the focus group, you will still be part of the larger study. Thank you so much for talking with me today.

IF YES:

“Wonderful, thank you! We will send you a letter with all the information you’ll need on the time and date and directions. We will also call you ahead of time to make sure you received the information and to answer any questions you might have at that time. At the start of the focus group, you will receive your \$60 gift card as our thanks for your participation. “

“Would you also like to receive an email reminder?”

YES: CONFIRM THEIR EMAIL ADDRESS AND SPELL IT BACK TO THEM FOR ACCURACY. WHEN DONE, CONTINUE BELOW

Email: \_\_\_\_\_

NO: CONTINUE BELOW

“To make sure we send the focus group information to the correct address, we would like to confirm your mailing address. This information will be kept strictly confidential.

6. “Is the following still your home address?”

READ EACH ADDRESS FIELD INCLUDING THE SPELLING OF THE STREET/CITY NAMES

- Yes → SKIP TO QUESTION 7
- No

(6a) “May I please have your home address?” **RECORD HOME ADDRESS:**

STREET: \_\_\_\_\_

CITY, STATE, ZIP: \_\_\_\_\_

7. “Is [HOME ADDRESS] also your mailing address?”

- Yes → SKIP TO CLOSING
- No
- Refused
- Don’t know

(7a) “May I please have your mailing address?” **RECORD MAILING ADDRESS:**

STREET: \_\_\_\_\_

CITY, STATE, ZIP: \_\_\_\_\_

PROBE FOR FULL MAILING ADDRESS AND READ IT BACK TO CONFIRM SPELLING.

**CLOSING:**

“Thanks again for taking the time to speak with me today. If you have any questions about this study, you may contact our toll-free study hotline at 855-207-6262. This information will also be included in the information you receive in your letter about the focus group time and location. Would you like me to repeat that number for you?”

Again, thank you for speaking with me. Goodbye.”

**COMPLETE FOR EACH PARTICIPANT RECRUITED**

**Study Site:** \_\_\_\_\_

**Counseling Agency:** \_\_\_\_\_

**Lender:**

- Bank of America
- CitiBank
- Wells Fargo

**Intervention:**

- Remote
- In-person

<b>Group Type:</b>	<b>Completion Status</b>	<b>Language:</b>	<b>Homeowner Status:</b>
In-person Completer <input type="checkbox"/>	<input type="checkbox"/> Complete	<input type="checkbox"/> English <input type="checkbox"/> Spanish	<input type="checkbox"/> Homeowner since RA <input type="checkbox"/> Homeowner at RA <input type="checkbox"/> Still Searching <input type="checkbox"/> No Longer Interested
In-person Non-completer <input type="checkbox"/>	<input type="checkbox"/> Partial <input type="checkbox"/> None	<input type="checkbox"/> English <input type="checkbox"/> Spanish	<input type="checkbox"/> Homeowner since RA <input type="checkbox"/> Homeowner at RA <input type="checkbox"/> Still Searching <input type="checkbox"/> No Longer Interested
Remote Completer <input type="checkbox"/>	<input type="checkbox"/> Complete	<input type="checkbox"/> English <input type="checkbox"/> Spanish	<input type="checkbox"/> Homeowner since RA <input type="checkbox"/> Homeowner at RA <input type="checkbox"/> Still Searching <input type="checkbox"/> No Longer Interested
Remote Non-completer <input type="checkbox"/>	<input type="checkbox"/> Partial <input type="checkbox"/> None	<input type="checkbox"/> English <input type="checkbox"/> Spanish	<input type="checkbox"/> Homeowner since RA <input type="checkbox"/> Homeowner at RA <input type="checkbox"/> Still Searching <input type="checkbox"/> No Longer Interested