

APPENDIX A
Phone Screening Script

Hello, may I speak to (NAME OF POTENTIAL PARTICIPANT)? My name is _____ I work for a research organization called MDRC. _____ at [ORGANIZATION/OFFICE] gave me your name. They thought you might want to be part of a research project we're doing. We are interviewing parents (or legal guardians) and their children to learn about how families understand and talk about their money situation. We also want to know what they think about any public benefits they get. The information that you and your children tell us during the interviews will only be shared with our research team. We will not share the things you tell us with [name of agency] and people in your family, including your children. Also, your answers will not have any effect on your benefits.

The interviews would be in-person. They should last about an hour and a half depending on how many people in your family we end up interviewing. If you decide to take part you and any children we interview would receive a gift or a gift card as a thank you.

Would you be interested in being part of this study?

Yes [CONTINUE] – “It will take about 30 minutes for me to give more information about the study and to discuss study eligibility.”

No – ASK “Could I tell you more about the study to see if you might be interested?”

Yes [CONTINUE] – “It will take about 30 minutes for me to give more information about the study and to discuss study eligibility.”

No – “Thank you for talking with me. I wish you the best.” [END CALL]

Participation is voluntary. If you agree to take part, a team of two trained interviewers—I might be one of those interviewers—would come to your house. Or you can suggest someplace else. One interviewer would interview you for about an hour and a half. The other interviewer would speak with your child or children, for between a half-hour and an hour each, depending on the age of your child. So, the time will differ by how many people in your family we interview. The interview with your child(ren) will be in an area in your house near to you so you can see him/her at all times. But it will be far enough so both you and your child can talk freely. Your child would be able to see but not hear you. As I said, only our research team will see the things we write down from the interview. We will do everything we can to protect your name and identity. We do want to make sure everyone is safe, so we have to tell someone

This collection of information is voluntary and will be used to understanding the families' experiences with money. Public reporting burden for this collection of information is estimated to average 30 minutes per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. The OMB number and expiration date for this collection are **OMB #: 0970-XXXX, Exp: XX/XX/XXXX**. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to Sam Wulfsohn at MDRC via e-mail at Samantha.wulfsohn@mdrc.org.

if we hear about abuse or neglect, or if someone talks about wanting to hurt herself or other people. We will write research reports about all the things we learn. Sometimes we will include things you said during the interview in our reports. We may write about your views of your family's money situation or what you think about public programs. If we do this, we will never use your name or any information that could identify you. It won't be able to be tied back to you in any way. Whether or not you decide to take part, it will not affect any benefits or services you get right now. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. The OMB number and expiration date for this collection are OMB #: 0970-XXXX, Exp: XX/XX/XXXX.

Do you have any questions? [INTERVIEWER: TAKE NOTES ON AND ANSWER QUESTIONS ASKED IF ANY]

Now that you know more about the study, are you still interested in participating?

- Yes [CONTINUE]
- No - ASK "Could I answer any questions you may have?"
 - Yes [ANSWER ANY QUESTIONS AND CONTINUE]
 - No - "Thank you for talking with me. I wish you the best." [END CALL]

So let me make sure you meet the criteria to be in the study.

[NOTE: If at any point respondent's answer suggests that the family does not meet the study criteria, say, "You know, I think this study is not quite right for you. I want to thank you so much for talking with me, and I wish you all the best."]

First, are you a parent or legal guardian of at least one child between the ages of 7 and 17 years old who currently lives with you? [NOTE: Participant must *have at least one* child (either as a biological parent or legal guardian) between the ages of 7 and 17 to be able to participate in the study]

- Yes [CONTINUE]
- No - SAY "You do not meet the criteria for the study. Thank you for talking with me. I wish you the best." [END CALL]

Could you tell me the ages of the children between 7 and 17 in your household for whom you are a parent or legal guardian ?

Child 1: _____

Child 2: _____

Child 3: _____

Child 4: _____

Child 5: _____

Child 6: _____

Is there a second parent in your household who is your child's biological parent, adoptive parent, or step-parent?

Yes

No

Tell me if any of these apply to your household:

Are you receiving help to get food with benefits such as SNAP [or name of state program] or WIC or getting help from a local food kitchen?

Are you receiving welfare, also known as TANF or [name of state program], or other benefits (e.g., Medicaid, unemployment)?

Are you not working, or working but with low earnings?

Would you say you are struggling to get by?

[NOTE: Mark all that apply. Participant must meet *at least one* of the criteria above to be able to participate in the study]

[IF YES TO ANY OF ABOVE] Are you willing to talk about your household's economic situation and any public benefits you may get?

Yes [CONTINUE]

No – SAY “It’s fine if you do not want to speak with us about this. However, this means that we would not be able to learn what we are trying to learn from interviewing you, so unfortunately you cannot participate in the study. Thank you for talking with me. I wish you the best.” [END CALL]

Not sure – ASK “Would you like to hear some of the kinds of things we would ask you, to help make up your mind?”

[NOTE: Interviewer must be familiar with the interview protocols to provide a general overview of the kinds of questions to be asked during the interview. You can use the following as a guide: “During the interview, we’ll be asking you to comment on your current economic situation. We also have questions about employment and any benefits you may be receiving. We will be asking questions about what it is like to apply for and receive public benefits such as TANF and SNAP and how helpful or not helpful these programs are for families. We also want to know how you and your family talk about money and your economic situation.”]

Finally, do you think your children would want to talk with us? As a reminder we will talk to them about their understanding of your family’s financial situation and how you talk about it with each other. Is your child/are some or all of your children talkative and relatively comfortable around new people? What is/are their age/s?

Yes [At least one child is talkative and relatively comfortable around new people -- IF MORE THAN ONE CHILD IS ELIGIBLE, ASK WHICH ONE(S) ARE TALKATIVE AND RELATIVELY COMFORTABLE AROUND NEW PEOPLE, then CONTINUE]

No – SAY “If you don’t think any of your children would want to talk with us or are not relatively comfortable around new people, we wouldn’t be able to do the interview and unfortunately you cannot participate in the study. Thank you for talking with me. I wish you the best.” [END CALL]

Not sure – ASK “Would you like to hear some of the kinds of things we would ask your [child/children], to help make up your mind?”

[NOTE: Interviewer must be familiar with the interview protocols to provide a general overview of the kinds of questions to be asked during the interview]

[IF THE PARTICIPANT MEETS ALL THE CRITERIA] **It looks like you meet all the criteria to be part of this study.**

If it is OK with you, I would like to schedule the interview. What is the best date and time to interview you and your child[ren] [and other parent if applicable] [Click here to enter text.](#)

[NOTE: INTERVIEWER: YOU MIGHT NOT BE ABLE TO SCHEDULE INTERVIEW WITH SECOND ADULT. ASK FOR CONTACT INFORMATION (IF DIFFERENT FROM PARTICIPANT) AND BEST TIME TO CALL TO SET UP AN INTERVIEW]

In terms of the location, we could meet either at your home or at some other location of your choice. As I said earlier, we would like to interview you and your child[ren] at the same time. So, is there a place – either your home or another location – were we could conduct the interviews in a way that you can both see each other, but far enough that both you and your child[ren] can talk freely?

[NOTE: INTERVIEWER: Assess whether the space suggested would accommodate simultaneous interviews with parent/legal guardian and child. Try to get an idea of how many people are likely to be present, what rooms are available for an interview, the general lay out of the house. Make note if there are too many people coming and going or crowded spaces. Prioritize the parent’s perspective]

What is the address? [Click here to enter text.](#)

IF PARTICIPANT DOES NOT KNOW OF A PLACE, ASK:

Will you be able to come for an interview at: [PROVIDE LOCATION OF PARTNER ORGANIZATION]

Yes

No

What language would you prefer we use to do the interview with you?

English

Spanish

Other – SAY “I’m sorry, but we do not have the language capability to be able to interview you in [LANGUAGE]. Do you think you can do an interview in English or Spanish? IF THEY RESPOND NO THEN SAY “Thank you for talking with me. I wish you the best.” [END CALL]

We are able to interview your children in either English or Spanish. Would they feel comfortable being interviewed in one of these languages?

Yes

No

What language would you prefer we use to do the interview with your children?

English

Spanish

Other – SAY “I’m sorry, but we do not have the language capability to be able to interview your child(ren) in [LANGUAGE]. Do you think you can do an interview in English or Spanish?” IF THEY RESPOND NO THEN SAY “Thank you for talking with me. I wish you the best.” [END CALL]

Is this number the best way to contact you? Is there another number at which I could reach you, if I need to? [Click here to enter text.](#)

We may not be able to interview all of your children. We’ll let you know in advance which of your children we’ll interview. Our decision about which child or children to interview will be based on the ages of other children included in the study. We want to have all ages represented.

Do you have any concerns about that? [INTERVIEWER: Note any questions or concerns that participant may have] [Click here to enter text.](#)

Do you have any questions for me? Would you like my phone number, in case you think of more questions or would like to get back to me for any reason?

[IF THERE IS MORE THAN ONE CHILD SAY] Either I or someone else on the team will contact you shortly to let you know which child/ren we’ll be interviewing.

Thank you so much for your time. [END CALL]