



## Recruitment Screener for Task 2 Interviews: Telephone Interviews with Financial, Legal, and Social Service Professionals

### **Parameters:**

- Recruitment for 5 telephone interviews
- Each interview will be 60 minutes in length
- Participants will each receive compensation of \$100
- Recruitment will take place through ICF outreach to professional and social service organizations. ICF will work with CFPB to identify appropriate organizations and agencies and will then reach out to those organization to identify qualified professionals that are interested in participating in the study.
- This document outlines the information that will be provided to potential recruits, as well as the criteria that will be used to define “qualified” professionals.

### **Recruiting Script**

*The following script will be read to all potential participants:*

Hello, my name is **[first and last name]**. May I speak to **[candidate]**?

I am calling from ICF, a research company that is working with the Consumer Financial Protection Bureau on a research project focused on housing decisions faced by Americans aged 62 and older. For this specific project, the CFPB is interested in learning more about the types of housing decisions that older Americans face, as well as how they make those decisions and what type of information and resources they use.

We are seeking people to participate in telephone interviews to talk about these topics, and **[name]** from **[organization]** suggested that you might be a good person to talk to. Each interview will last no more than 60 minutes, and participants will receive a \$75 stipend in appreciation for their time.

It is important that you know that we will be recording the interviews so that we can be sure to collect what you say accurately. However, your name will not appear in any reports that ICF writes or the Consumer Financial Protection Bureau. Also, just so you are not surprised, other staff from the Consumer Financial Protection Bureau and ICF may also listen to the interviews. You will not have to provide any information that you feel uncomfortable discussing.

Everything you say will be kept private except where required by law. Further, none of your contact information will be given to ICF or the Consumer Financial Protection Bureau.

*Before asking any questions, read the brief Privacy Act Statement:*

*The information you provide through your responses will assist the study sponsor, the Consumer Financial Protection Bureau (CFPB), in determining your eligibility to participate in interviews.*

A federal law called the Privacy Act directs how the CFPB collects, keeps, and shares your personal, private information – including the personal information contained in your answers to these questions. Your participation is completely voluntary and is subject to the privacy policy that can be found on the CFPB’s website, [consumerfinance.gov](http://consumerfinance.gov).

*Paper work Reduction Act Statement:*

*According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The OMB control number for this collection is 3170-0036. It expires on 10/31/2022. The time required to complete this information collection is estimated to average approximately 6 minutes per response. Comments regarding this collection of information, including the estimated response time, suggestions for improving the usefulness of the information, or suggestions for reducing the burden to respond to this collection should be submitted to Bureau at the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to [PRA\\_Comments@cfpb.gov](mailto:PRA_Comments@cfpb.gov).*

1. As part of your job, do you advise or provide information to people about housing-related decisions? These decisions could be related to buying or selling homes, renting, avoiding foreclosure, or taking out and/or modifying home equity loans, mortgages, or reverse mortgages.
  - a. Yes
  - b. No → *Thank respondent politely and end call.*
  
2. Would you say that among the people that you advise or provide information to on housing-related decisions, at least 25 percent are aged 62 or older?
  - a. Yes
  - b. No → *Thank respondent politely and end call.*
  
3. Which of the following best describes the type of advice or information that you provide?
  - a. Financial planning advice related to housing-related products such as mortgages, reverse mortgages, or home equity loans
  - b. Required counseling through the HECM program
  - c. Legal advice or assistance related to housing
  - d. Assistance to people in financial crisis (e.g., those who are seeking to avoid foreclosure)

Screening Criteria	Recruiting Requirements (out of 5 interviews)
Role (Question 3)	<ul style="list-style-type: none"> <li>• 2 recruits should answer (a)</li> <li>• 3 recruits should answer (b), (c), or (d)</li> </ul>

Screening Criteria	Recruiting Requirements (out of 5 interviews)
<p>4. Would you consider the area where your clients live to be urban, suburban, or rural? <i>Check all that apply.</i></p> <p>a) Urban b) Suburban c) Rural</p>	<ul style="list-style-type: none"> <li>• Across five interviews, at least 1 should answer (a), (b), and (c)</li> </ul>

*If participant qualifies:* Based on your responses, we would like to invite you to participate in an interview, which will be held at **[interview time and date]**. The interview will last approximately 60 minutes. You will receive \$100 in compensation for your time.

*If participant is willing to participate, record their name and contact information, confirm the time and date and indicate that they will receive a confirmation call the day before the interview. Regardless of whether or not they are willing to participate, thank them before ending the call.*