

Appendix VI.
Family forest owner focus group screener questionnaire

**Family Forest Research Center
Tax Project
Focus Group Screener Version 1.0**

Interviewer's name: _____ Interview date: _____

Respondent's Name: _____

Address: _____

City, State Zip: _____

Phone: Home _____ Work: _____

Mobile: _____

E-mail: _____

Indicate group respondent is recruited for on {date}

() Group 1, 12pm: Enrolled in {state's preferential property tax program}

() Group 2, 6pm: Not enrolled in {state's preferential property tax program} or
do not know

IMPORTANT NOTES TO RECRUITER:

- Recruit 10 per group for 8 to show.
- Recruit from a variety of areas within about 30 miles or an hour from the facility.
- Call a few people who are listed as owners in the area but have a mailing address outside the area. (These people may use the land as a second home or be owners who do not visit that land; either is fine.)
- It is extremely important that respondent be articulate and speaks clearly without any speech impediment. If at any time during the interview you feel that the respondent has difficulty expressing his or her thoughts or feelings, please thank and terminate.
- If the interview terminates at any of the following questions, please thank and advise the respondent politely that "the quota for that category has been filled" and thank him/her for his/her time.

RESPONDENT QUALIFICATIONS:

- Area of Woodland Owned (Q3):
 - All must own at least 10 and less than 1,000 acres of woodland
 - Owns 10-49 acres (3-4 per group)
 - Owns 50-249 acres (3-4 per group)
 - Owns 250+ acres (3-4 per group)
- Ownership type (Q4):
 - All must be individual, joint, family partnership, trust, estate, family LLC, and/or family sub-chapter S corporation
 - No specific mix among these groups required
- Decision maker (Q5):
 - All must make decisions alone or share about equally with someone else
- Commercially harvested trees (Q6):
 - 3-6 per group
- Inherited land (Q7):
 - Minimum of 3-4 per group
- Have plans for the future of their land(Q8):
 - Minimum of 3-4 per group
- Participates in a preferential property tax program (Q9):
 - Two separate groups
- Conservation easement (Q10):
 - 2-3 per group
- Education (Q11)
 - 3-4 per group with at least a bachelor's degree
- Age (Q12):
 - All respondents must be 21 years or older
 - Minimum of 3-4 per group who are under 50
- Gender (Q13):
 - Minimum of 3-4 women
 - Minimum of 3-4 men

[START OF SCREENER SCRIPT]

Hello, my name is {insert interviewer’s name}. I am calling on behalf of Langer Qualitative, an opinion research firm. We are conducting an interesting study in your area today and want to ask you a few questions. We are not selling anything and all of your responses will be kept confidential.

[IF ASKED WHO IS FUNDING THIS STUDY, SAY: The American Forest Foundation.]

[AVAILABLE]

1. Is {insert respondent’s name} available?

Yes() [CONTINUE]

No.....() [IF NO, LIST REASON WHY NOT]

[REASON FOR NOT RESPONDING:] _____

[IF CURRENTLY UNAVAILABLE, ASK FOR GOOD CALL BACK

DATE/TIME]: _____ [THANK AND CALL BACK LATER]

[IF DECEASED OR UNAVAILABLE FOR EXTENDED TIME PERIOD, ASK IF THERE IS SOMEONE ELSE IN THE HOUSEHOLD WHOM YOU COULD TALK TO.]

2. Are you at least 21 years of age?

Yes() [CONTINUE]

No.....() [IF NO, ASK IF THERE IS SOMEONE ELSE IN THE HOUSEHOLD WHOM YOU COULD TALK TO.]

[LAND]

3. a. Do you currently own any land in {state}?

Yes () [CONTINUE]

No..... () [THANK AND TERMINATE]

[WOODLAND]

b. Of this land, about how many acres are wooded or covered by trees?

[IF RESPONDENT IS UNSURE, ASK:] About how much of the land would you say is wooded or covered by trees, that is, has a lot of trees together? You can give me an answer such as “a tenth,” “half” or “three-quarters” – an estimate of how much of your land is covered by trees.

Acres of woodland _____ acres [CONTINUE]

OR

Percent of land that is wooded _____%

→ [CALCULATE ACRES OF WOODLAND]

Acres of woodland _____ acres [CONTINUE]

[ALL RESPONDENTS MUST SAY THEY OWN 10-999 ACRES OF WOODLAND IN THE STATE. FOR EACH GROUP RECRUIT 3-4 WHO OWN 10-50 ACRES, 3-4 WHO OWN 50-250 ACRES, AND 3-4 WHO OWN 250-1,000 ACRES. IF RESPONDENT OWNS LESS THAN 10 ACRES OF WOODLAND OR MORE THAN 1,000 ACRES OF WOODLAND, THANK AND TERMINATE.]

[OWNERSHIP TYPE]

4. There are many different ways that land is owned. Which of the following best describes the type of ownership in which your land is held?

[READ LIST AND CHECK ALL THAT APPLY.]

- Individual or joint ownership.....() [CONTINUE]
- Family partnership, trust, or estate.....() [CONTINUE]
- Family LLC or Subchapter-S corporation() [CONTINUE]
- Some other type of ownership (specify).....() [THANK AND TERMINATE]

[ALL RESPONDENTS MUST SAY THEIR LAND IS OWNED THROUGH INDIVIDUAL, JOINT OWNERSHIP, FAMILY PARTNERSHIP, TRUST, ESTATE, FAMILY LLC, OR FAMILY SUBCHAPTER-S CORPORATION. IF RESPONDENT SAYS “CORPORATION,” PUT WITH “OTHER” AND TERMINATE. IF YOU ARE UNSURE, CHECK WITH LARGER QUALITATIVE.]

[DECISION MAKER]

5. Which of the following statements best describes your involvement in decisions concerning major uses of your land? [READ LIST AND CHECK ONE]

[Examples of decisions included: selling land, harvesting trees, etc.]

- You alone make the decisions..... () [CONTINUE]
- You share the decisions equally with someone else.....() [CONTINUE]
- You play little or no role in the decisions..... () [SEE BELOW]

[ALL RESPONDENTS MUST SAY THEY EITHER MAKE DECISIONS CONCERNING THEIR LAND ALONE OR SHARE DECISIONS ABOUT EQUALLY WITH SOMEONE ELSE. IF THE RESPONDENT DOES NOT QUALIFY, ASK TO SPEAK TO SOMEONE WHO IS A JOINT OWNER AND MAKES DECISIONS CONCERNING THE USE OF THE LAND. THAT PERSON MAY EITHER BE IN THE SAME HOUSEHOLD OR LIVE SOMEWHERE ELSE; START FROM THE BEGINNING OF THE SCREENER. IF NO OTHER PERSON WHO FITS THIS ROLE IS AVAILABLE TO TALK TO NOW OR A LATER TIME, TERMINATE.]

[HARVEST]

6. Since you have owned your land, have any of your trees been harvested and sold?

- Yes() [RECRUIT 3-6 PER GROUP]
- No.....()

[INHERITANCE]

7. Did you inherit any of your woodland in {state} from a family member?

- Yes() [RECRUIT 3-4 PER GROUP]
- No.....()

[FUTURE]

8. a. Have you taken formal, legal steps concerning the future of your land?

[Examples include: Putting the land into a trust, creating an LLC, creating an estate plan.]

Yes()

No() [IF NO TO QUESTION 7B]

b. If no, do you plan to take any formal, legal steps concerning the future of your land in the next 5-10 years?

Yes()

No.....()

[RECRUIT 3-4 PER GROUP WHO HAVE EITHER TAKEN STEPS OR ARE PLANNING TO DO SO]

[TAX PROGRAM]

9. Is any of your woodland enrolled in {name of state’s preferential property tax program}?

Yes() [RECRUIT FOR GROUP 1]

No.....() [RECRUIT FOR GROUP 2]

Don’t know() [RECRUIT FOR GROUP 2]

[CONSERVATION EASEMENT]

10. Conservation easements are voluntary agreements that permanently protect land from development. These are legally binding agreements made between the landowner and the easement holder, usually a land trust or government agency.

Have you sold or donated a conservation easement on any of the land that you own in {state}?

Yes()

No.....()

[RECRUIT 2-3 PER GROUP]

[EDUCATION]

11. What is the highest level of formal education that you have completed? [READ LIST.

CHECK ONE.]

Less than 4 years of high school.....()

High school graduate()

Some college()

College degree()

Graduate study or degree()

[RECRUIT MINIMUM OF 3-4 PER GROUP WHO HAVE AT LEAST A COLLEGE DEGREE]

[AGE]

12. For background purposes, which of the following groups describes your age? [READ LIST]

- Under 21.....() [THANK AND TERMINATE]
- 21-34 years old () [CONTINUE]
- 35-49 years old () [CONTINUE]
- 50-64 years old () [CONTINUE]
- 65 years or older () [CONTINUE]
- [Prefer not to say] () [CONTINUE – ask if under/over 50]
- [RECRUIT 3-4 PER GROUP WHO ARE UNDER 50.]

[GENDER]

13. [DO NOT ASK. RECORD GENDER BASED ON RESPONDENT’S VOICE AND NAME]

- Male ()
- Female ()
- [RECRUIT MINIMUM OF 3-4 WOMEN AND A MINIMUM OF 3-4 MEN. ONLY ONE PER HOUSEHOLD.]

[INVITATION]

14. [IF QUALIFIED, ASK:] We would like to invite you to participate in a research discussion group at the {Insert location, date, and time from below}. You would be asked to share your opinions and ideas with other landowners like yourself. The discussion will last approximately two hours and you would be paid {insert dollar amount} for your time and cooperation. Light food (sandwich platters) and refreshments will be provided. Would you be willing to participate?

- Yes.....() [THANK. VERIFY/UPDATE NAME AND CONTACT INFORMATION. ASK RESPONDENT TO ARRIVE 15 MINUTES EARLY AND TELL HIM/HER THEY WILL BE CONTACTED AGAIN A FEW DAYS PRIOR TO THE MEETING]
- No () [THANK AND TERMINATE]

[Check the group for which the respondent is scheduled:]

- () Group #1 – To be held in {city, state} at the {facility, address} on {date} from noon until 2:00 PM
- () Group #2 – To be held in {city, state} at the {facility, address} on {date} from 6:00 until 8:00 PM

[THANK AND TERMINATE]