BY THE PEOPLE
FOR THE PEOPLE
WITH THE PEOPLE

Life Experience Discovery Research Methods & Tools

Recording keeping

The research team will collect signed consent forms from each participant, either electronically or paper-based. Participant names and other PII will be logged into a participant management spreadsheet. This spreadsheet will be stored on an OMB Max page within the project. The consent forms will be stored in a separate folder from the spreadsheet. Access to the participant management spreadsheet and the consent forms will be limited to the project team lead and the OMB CX team liaison for the project’s duration. Once the project is completed, only OMB CX team leads will have access to these records.

Each participant's name will have a code and number within the research management spreadsheet. The code is based on the participant type (e.g., MOP for a member of the public). Each participant will also have a unique number. Subsequently, all materials with participant data will only be labeled with the code and number. Each participant’s consent form will have the code and number.

During the conversation, one member of the research team will capture notes using the notes template. The notes template will be labeled with the participant code and number and never contain PII. After the conversation, notes documents will be stored in a folder on an OMB Max page within the project domain. Access to conversation notes will be limited to project team members and the OMB CX team liaison.

Participant Compensation

The semi-structured conversations with members of the public are vital to the success of this project. The information collection requires that a range of people with specific lived experiences be available to speak with the team for 30-60 minutes during a short research period. Recruiting members of the public who are willing and able to give this time can be a challenge. Speaking to a member of this target population may cut into their time working or seeking work and therefore pose a financial imposition.

In qualitative research, in the public and the private sectors, it is a common practice to fairly compensate participants for their time. Utilizing a compensation model aids recruitment and can improve the quality of the data because teams are more likely to reach the target populations and incentivize participation.

The compensation model for this information collection will work as follows. The research teams will not double-compensate participants who are already paid for their time during the conversation window (e.g., frontline staff member who is at work and speaking about their work). Participants will be compensated $25.00 for conversations of up to 30 minutes and $50.00 for conversations between 31 and 60 minutes. The research teams will use one of two modes of providing compensation, the first is a physical gift card, and the second is through a virtual method, such as PayPal. The research team will provide compensation to the participant before the conversation begins. In the case of virtual conversations, the team may mail a physical gift card that will arrive after the conversation.

Research Conversation Roles

Aligning on role assignments and responsibilities before the conversation is key to facilitating a seamless, respondent-centered ethnographic discussion.

- **Conversation Lead:** The Conversation Lead will be the designated speaker and facilitate the discussion. While other researchers will have the opportunity to ask follow-up questions at the end, the facilitator will be the primary leader of the conversation.
- **Note Taker:** The Note-Taker will be fully focused on capturing raw data points (including quotes and stories) from the discussion and photos, where applicable and in agreement with participant consent.
- **Observer:** The Observer will support the note taker by capturing key insights and assist the Lead as needed.

Interview Roles in Practice		
Interview Lead	**Note-Taker**	**Observer**
• Brief introductions • Small talk • Overview of purpose • Asks questions • Thank participants for their time	• Records all notes • Records what the respondent is saying verbatim • Does not interrupt the facilitator, but join when invited at the end with any follow- up or clarification questions	• Records key quotes in the conversation • Notes any visible actions related to body language or attitude • Listen attentively and only join when invited at the end with clarification or follow-up questions
• The respondent is the expert • Avoid leading questions • Look for stories • Use the respondent's own words • Use silence strategically (wait 3 – 5 seconds after they've stopped talking) • Make notes on things you want to follow-up on	• Use short-hand when possible (e.g., >,<,=, →, *) • Do not synthesize on the fly • Document the unstated, including body language and voice changes • Keep track of questions that you gather • Mark points in the conversation that seem important • Time-Stamp notes with the time on the audio recording	• Keep track of timestamps for key quotes • Document responses to support the Note-Taker for lengthy or important responses • Keep track of questions you gather for follow-up or key ideas for synthesis
All Roles: • Debrief conversation (individuals): Clean notes, highlight key stories, soundbites, and initial insights • Debrief conversation (team): Discuss observations, interesting stories, and quotes • Brainstorm insights at the end of each day and align on key takeaways • Define key focus areas for following conversation		