

Research Methodology

Expectations and Challenges



18F

GSA

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Overview

Research questions and methods

Research questions

We wanted our research to answer these questions:

- What touch points do people **think** they have with the federal government?
- What touch points do people **actually** have with the federal government?
- What are the pain points of people's interactions with the federal government?
- Are people taking advantage of government services they are eligible for?
- How do people feel about sharing their information with the government?

Touch points are places (digital and physical) where people interact with their government — for example, websites, 1-800 numbers, or government offices.

Pain points are places where people's interactions become unpleasant, inefficient, or otherwise unsatisfactory.

We wanted to explore the touch points, pain points, and information-sharing attitudes of all the people who interact with the U.S. federal

government. This includes U.S. citizens, but it also includes other people who interact with the government as they travel, immigrate, or conduct business with the United States.

Methods

Here's what we did to answer these questions:

- We conducted scheduled interviews with people in Sacramento, Jacksonville, Philadelphia, Minneapolis, and Kansas City.
- We conducted intercept interviews with passersby in senior centers and on college campuses in Sacramento, Jacksonville, Philadelphia, Minneapolis, and Kansas City.
- We conducted a diary study with reference librarians around the country.

Each method was designed to answer our research questions, but for different groups of people. The recruited, scheduled interviews focused on people with many types of experiences with the federal government. The intercept interviews focused on students and seniors — two groups of people who tend to interact with the federal government, but who are harder to recruit for scheduled interviews. The librarian diary study helped identify pain points and touch points that direct interviewing might not uncover. For example, people who are uncomfortable talking to an official interviewer may casually ask a librarian a question relevant to our areas of study. By conducting a diary study with librarians, we gathered data on people's pain points without directly interviewing those people, thereby getting more complete (and accurate) data.

Theoretical framework

We explored government touch points, pain points, and information-sharing attitudes associated with certain life events. Life events are times when people's lives change significantly. We focused on life events that involve government interactions, including:

- Retiring
- Applying for student financial aid
- Starting a new job
- Losing a job
- Starting a new business
- Purchasing a home
- Changing your name
- Adopting a child
- Traveling internationally
- Traveling via air
- Traveling to a national park, monument, or other public land

By asking about people's experiences during these life events, we were able to explore government touch points and pain points without focusing on particular agencies. This approach uncovered unexpected government touch points (and, as a result, pain points) and helped kickstart a broad, open-ended conversation without leading participants in a particular direction.

Read more about the life events approach to government services at the American Council for Technology and Industry Advisory Council's website (www.actiac.org/lifeeventsproject).

Scheduled interviews

Recruitment methods

Elliot Benson Research recruited interviewees for our study from their nationwide database. To participate, an interviewee had to meet the following criteria:

- They could not be a federal government employee.
- They could not have participated in market research or a usability test during the last six months.
- They must have experienced one or more of the following life events in the past two years:
 - Purchased a new home
 - Traveled via air
 - Traveled to a national park, monument, or other public lands
 - Traveled internationally
 - Started a new job
 - Lost a job
 - Changed their name
 - Applied for or received Social Security benefits for the first time
 - Enrolled in or changed their Medicare plan
 - Started a new business
 - Joined or were discharged from the military
 - Applied for student loans
 - Adopted a child

We asked the recruiters at Elliot Benson to assemble a set of participants with varied:

- Ages
- Education levels
- Primary languages (although all had to speak English)
- Genders
- Device ownership
- Device usage preferences (for the device on which they do the majority of their browsing)
- Degrees of experience with the internet (as assessed through a multi-item scale)

[See Appendix A for the recruiting script.](#)

Interview locations

We conducted our scheduled interviews in the following locations:

- Sacramento — Capitol Mall Federal Building
- Jacksonville — Saint John’s County Public Library System: Bartram Trail Branch
- Kansas City — Kansas City Public Library: Bluford Branch
- Philadelphia — Free Library of Philadelphia: Parkway Central Library
- Minneapolis — Minneapolis Central Library

Number of participants

We recruited 40 interviewees, the largest number of participants our budget and schedule would allow. Here’s the breakdown of interviewees by location:

- 8 in Sacramento
- 7 in Jacksonville
- 9 in Kansas City
- 6 in Philadelphia
- 8 in Minneapolis

Four participants did not show up for their interviews. Including our intercept interviews, we interviewed a total of **3,635 people**.

Participant demographics

AGE RANGE	PARTICIPANTS
25 – 34	10
35 – 44	8
45 – 54	8
55 – 64	9
65+	1

EDUCATION LEVEL	PARTICIPANTS
High school	5
Some college	15
College degree	10
Advanced degree	6

Language spoken at home

All but 5 of the interviewees spoke primarily English at home.

Computer and mobile device use

DEVICE OWNED	PARTICIPANTS
Laptop / desktop computer	36
Smartphone <i>with internet access</i>	35
Small tablet <i>iPad mini / Galaxy tablet</i>	15
Large tablet <i>such as an iPad</i>	18

BROWSING DEVICE	PARTICIPANTS
Laptop / desktop computer	17
Smartphone	16
Small tablet	2
Large tablet	6

DIGITAL EXPERIENCE	PARTICIPANTS
Basic	12
Moderate	7
Expert	17

Interview protocol

During each 45-minute interview, we did the following:

- Introduced the project, its general purpose (“understanding what it’s like to interact with the government during some key life events”), and the consent form.
- Surfaced big life events by asking questions like “What big changes have happened recently in your life?” or by reviewing life events the interviewee had indicated with the recruiter.
- Asked the interviewee to go into more detail about each life event they mentioned. This included:
 - How they handled the life event (walking them through it)
 - What was hard and easy about it
 - How they felt about sharing information with the government during that life event
 - How they would feel, during the life event, about government agencies sharing information with each other

We also followed up with questions specific to each interviewee’s life events so we could get a complete picture of their context and influences.

[See Appendix B for the entire scheduled interview guide.](#)

Incentives

Participants in Sacramento, Jacksonville, Kansas City, and Minneapolis each received a \$100 cash honorarium. Participants in Philadelphia each received an \$85 honorarium.

Intercept interviews

Recruitment

Although details varied by location, we recruited intercept interviewees using two strategies: We approached older adults visiting senior centers for lunch or a program, and we approached young people on college campuses.

We identified ourselves and asked each person we approached whether they would be willing to participate in a quick interview about the government. In several senior centers, we were also introduced by center staff.

We also asked similar questions to librarians and senior center staff in many of the places we visited. Those discussions are not included in the interview count.

We selected the senior centers and universities based on the populations they served. We attempted to pick a mix of senior centers and universities that served varied populations.

Interview locations and number of participants

We conducted intercepts at the following locations:

- West Sacramento Senior Center: Sacramento, CA (3 interviews)
- Sacramento Hart Senior Center: Sacramento, CA (7 interviews)
- Flagler College: Jacksonville, FL (8 interviews)

- Don Bosco Senior Center: Kansas City, MO (Spoke only to staff)
- Donnelly College: Kansas City, KS (3 interviews)
- Philadelphia Senior Center on the Avenue of the Arts: Philadelphia, PA (4 interviews)
- Minneapolis Skyway Senior Center: Minneapolis, MN (Spoke only to staff)
- Edina Senior Center: Edina, MN (Spoke only to staff)

Participant demographics

We did not formally collect demographic information, but attempted to pick senior centers that serve a variety of audiences.

Interview protocol

The intercept interview protocol closely followed the scheduled interview intercept protocol, but focused on a single life event — usually filing for Social Security/Medicare or applying for federal student financial aid.

[See Appendix C for the entire intercept interview guide.](#)

Diary study

Recruitment

We recruited reference librarians from several American Library Association email lists, including:

- EGov Subcommittee
- Reference and User Services Association
- Library and Information Technology Association (LITA)
- New Members Roundtable

Librarians who expressed interested completed an online form about their libraries and duties. Librarians were only excluded from the study if they worked for:

- An academic library
- A state library
- A federal library

Librarians were also excluded if they worked fewer than five hours a week in a patron-facing position.

Number of librarians

- 32 librarians expressed interest in participating.
- 21 received invitations to participate (the others were excluded for the reasons listed above).
- 7 accepted invitations and participated in the study.

Participating libraries

Participating librarians varied in age and income level. They also worked in cities in towns with varied populations.

Number of diary study entries

We received 52 diary study responses, 23 of which came from a single participant.

Participant demographics

To respect the privacy of their patrons, we did not require librarians to complete multiple choice questions in their diary entries. However, as librarians completed the diary study, they could answer an open-ended question about their patrons: Who were you helping?

Librarians reported helping people of various genders and ages, and who spoke different primary languages.

Procedure

We asked the librarians to answer questions in an online form every time they had a reference interaction that involved questions about state or federal government information. We told them, “We’re interested in any type of request related to government services, no matter how small.”

[See Appendix D for the entire text of the invitation email.](#)

For each government-related inquiry they received, librarians answered these open-ended questions:

- Who were you helping?
- What was the person trying to do?
- What was the outcome or result?
- What, if anything, got in the way?
- Anything else you’d like to add?

Incentives

Intercept interviewees did not receive honoraria.

[See Appendix E for a reproduction of the diary study form.](#)

Appendix A: Recruiting script

Introduction

Hello, my name is [your name] and I'm calling from [recruiting agency]. Today, we're looking for people who recently traveled or experienced a life change. We'd like to ask you a few questions to see if you qualify for a 45-minute research study being conducted on Oct XX, 2015. We would give you an honorarium of \$XX to give us your input and feedback. Would you be willing to answer a few questions to see if you qualify?

I'd like to mention that any answers you provide about yourself will remain strictly confidential and will not be shared or associated with your name. We simply ask the following questions to ensure that you meet the demographics of others like you who may also be participating.

User role

Please tell me a little bit about yourself.

1. Are you a federal government employee?

- Yes – TERMINATE
- No

2. In the past two years, have you done any of the following (select all that apply)?

- Purchased a new home
- Traveled via air
- Traveled to a national park, monument, or other public lands
- Traveled internationally
- Started a new job

- Lost a job
- Changed your name
- Applied for or received Social Security benefits for the first time
- Enrolled in or changed your Medicare plan
- Started a new business
- Joined or were discharged from the military
- Applied for student loans
- Adopted a child
- None of the above – TERMINATE

Demographics

1. Which of the following best describes your age? RECRUIT MIX

- 18-24
- 25-34
- 35-44
- 45-54
- 55+

2. What is your highest level of education? RECRUIT MIX

- Less than high school
- High school or high-school equivalent
- Some college
- College degree
- Advanced degree

3. What language do you speak at home? RECRUIT MIX

- English
- Spanish
- Chinese
- Tagalog
- French
- Vietnamese
- Other (specify)
- Prefer not to answer

4. Please indicate...RECRUIT MIX

- Male
- Female

5. Have you participated in a market research or usability test in the in the past six months?

- Yes – TERMINATE
- No

6. Are you available for a 45-minute session on Oct. XX, 2015?

- Yes
- No – TERMINATE

Technology questions

1. Which of the following devices do you own? (Select all that apply.)

RECRUIT MIX

- Laptop or desktop computer
- Smartphone (with internet access)
- Small tablet (such as an iPad mini or Samsung Galaxy tablet)
- Large tablet (such as an iPad)
- None

2. How do you do the majority of your browsing? RECRUIT MIX

- Laptop or desktop computer
- Smartphone
- Small tablet
- Large tablet

3. Which of the following best describes your internet usage on any device?

- I know how to connect to a WiFi network.
- I can go to a website directly without using a search engine like Google.
- I look up maps or driving directions online or with my phone.
- I browse or research government information.
- I access social networking sites like Facebook, Twitter, Instagram, Pinterest, and so on.
- I know how to change who I share content with on social networking sites like Facebook (e.g. friends, friends of friends, or public).
- I know how to remove friends from my contact list on social networking sites like Facebook, Twitter, Instagram, Pinterest, and so on.
- I post updates about my status via Twitter.
- I look at or pin items on Pinterest.
- I stream movies to my device.
- I connect to a cloud service, such as iCloud or Dropbox, to save files.
- I complete online forms.
- I upload files to other websites.
- I normally look at more than the top three search results.
- I know how to adjust my privacy settings in my browser.
- I download or save photos I find online.
- I generally compare different websites to compare information.
- I know how to bookmark a website.

Terminate or schedule participants

Terminate

Thank you for your interest, but at this time you do not meet the criteria for this evaluation. We appreciate your interest.

Schedule

Thank you for taking the time to answer my questions. We would like to invite you to participate in our research study on **[insert date]**. The session will last approximately 45 minutes and you will receive a **\$XX** as a token of our appreciation.

May I schedule you to attend?

- Yes – CONTINUE
- No – POLITELY THANK PARTICIPANT FOR THEIR TIME

Again, let me thank you for your participation. This research is important to all of us, and your help and participation is greatly appreciated.

Appendix B: Scheduled interview guide

Note: Interviewers only used these questions as guidance. They did not ask each question verbatim to each participant. Rather, they had a conversation intended to answer these questions.

Introduction (5 minutes)

My name is [your name] and I work for the U.S. federal government's General Services Administration. Thank you so much for agreeing to participate in this interview! Also with me is [note taker's name], who will help by taking notes today.

Today, we'd like to talk to you about life events you've experienced during the last two years. "Life events" are times when your life has changed significantly. Some life events make us happy, while others make us sad. Sometimes they aren't necessarily happy or sad, but take a lot of effort. Sometimes, we start and plan life events ourselves. Other times, they happen to us and are largely out of our control.

During the course of the interview, we'll talk about the ups and downs of dealing with life's various big events. Your stories will help us understand how we can make interacting with the government easier.

Your participation in this interview is completely voluntary.

With your permission, we will be audio taping these sessions. The information that is captured will only be used to for evaluation, research, and training purposes and will not be shared. Is it OK for me to begin recording now?

We will take the following precautions to keep your responses anonymous:

- We will not write your name on our interview notes.
- We will not label our recordings of our interview with your name.
- We keep the list of people we interviewed, our notes, and the recording in a secure place where only team members can access them.

This consent form summarizes this information and some other project background.

At the bottom, you can choose whether we may share quotes from your interview. Unless you give us permission, we will not share any quotes from your interview (even anonymized ones) outside our project team. If you're open to us sharing quotes in reports to our project team or in blog posts that describe our project, check the box below the signature lines.

Take a few minutes to read over the consent form and sign the consent form. Feel free to ask me any questions that come up!

This interview will take about 45 minutes. Let me know if you need a break at any point — the bathrooms are [insert instructions here].

Do you have any questions for me before you get started? You can also ask questions at any point during the interview.

Warming up: surfacing big life events (5 minutes)

As I mentioned before, today's interview is about recent big changes in life, or "life events."

1. To get started, what are some recent highlights of your life? What's been going well?
2. What changes have you had to make recently that may have impacted your life either positively or negatively?

Chat a bit about the life events they bring up. Use this as an opportunity to get comfortable, build trust.

3. You've mentioned several life events. **[Review them]** I'd like to dive into talking about one of them more, particularly about how you interacted with the government during this life event. Which one would you like to talk more about?

Delving into a life event (15 minutes)

1. Could you tell me a little bit about what led up to **[life event]**?

Try to understand the context of the life event. What precipitated it will have a lot to do with how it works out.

2. How did you go about handling **[life event]**? What did you have to do because **[life event]** occurred? Walk me through, the best you can remember, the steps you took during and after the **[life event]**. As you say the steps, I'll write them each down on a sticky note so we can reference them as we talk. Let's also try to write down what institutions or organizations you might have interacted with at each stage of the event.

For each step, ask about what institutions they interacted with and what their goals were for each interaction. This is the opportunity to surface "touch points," but we should avoid using that language explicitly or asking, "When did you interact with the federal government?"

If you're having trouble eliciting specifics, switch to the "Questions specific to certain life events" in the appendix. Use them to spark conversation that answers this and following questions.

If none of the steps involved the federal government, move onto the next life event and don't ask the following questions.

3. What were the easiest parts of dealing with **[life event]**? What made them easy?

Ask for more detail on easy parts that involve the federal government.

4. Looking back, what were the most difficult parts of dealing with **[life event]**? What made them difficult?
 - a. Can you tell me about frustrations you had with the government during these processes?
 - b. What would have made your interactions with the government during **[life event]** easier?

5. **[If applicable]** During the **[life event]**, were you asked to provide information about yourself to the local, state, or federal government? Can you tell me a little more about this process? Is there anything that could have been done to make this process easier for you?

6. **[If applicable]** How do you feel when you have to share that information with the government? Are you comfortable with a government agency sharing information about you with another government agency, as long as you were informed in advance, if it means that you no longer have to inform multiple agencies of the same thing?

7. **[If applicable]** You had to give your information to a couple different agencies in the course of dealing with **[life event]**. How would you feel about one of those agencies sharing that information with the other?

- a. If you filled out a form on **[agency's]** website and they offered you an option to share this information with **[other agency]** so that you would have access to **[benefits from other agency]**, would you be more likely to consider sharing your information?

If 5 minutes or fewer left, skip to section F.

Identifying other life events

Ask these questions only if you have 15 minutes or more remaining (enough to go through another life event).

Just to make sure we've covered everything, I'm going to read you a list of other big life events people sometimes go through. If you've experienced one of these life events and would be interested in telling me more about it, let me know when I read it.

- Applied for or received Social Security benefits
- Enrolled in or changed your Medicare plan
- Applied for student loans
- Lost a job
- Started a new business
- Purchased a home
- Started a new job
- Changed your name
- Adopted a child
- Travelled internationally

- Travelled via air
- Travelled to a national park, monument, or other public land

Repeat section C for the life event they chose.

Conclusion

Thank you again for sharing your story and thoughts with me. We really appreciate your help. Do you have any other questions or thoughts for me?

Questions for particular life events

Adopted a child

1. How did you learn about the adoption process? Consult any government websites or services? What was easy to learn about? What was hard?
2. Did you adopt a child from the United States?
 - a. If so, how did you learn about your state's requirements? Consult any government websites or services? Were the requirements easy to find? Hard to find?
 - b. Have you legalized the adoption yet? Consult any government websites or services? What was easy to learn about? What was hard?
3. Did you adopt a child from overseas?
 - a. If so, how did you learn about the intercountry adoption process? Consult any government websites or services? What was easy to find? What was hard to find?
 - b. What was easy about completing the necessary forms (I-800 or I-600, N-600)?

Business — Started a new one

1. Did you get help writing a business plan? If so, where did you go for help? What was easy about that process? What was hard?
2. How did you apply for a federal tax identification number? What was easy about the process? What was hard?
3. Did you look for information on business tax credits? What was easy about the process? What was hard?
4. Did you file federal payroll taxes? If so, how? What was easy about that process? What was hard?
5. Did you consider applying for loans or grants from the Small Business Administration? If so, how? What was easy about that process? What was hard?
6. Did you look up information on health insurance requirements? If so, where? What was easy about that process? What was hard?
7. Did you register a trademark or patent? If so, how? What was easy about that process? What was hard?
8. Did you contact anyone with questions about labor laws in your state? If so, who? What was easy about that process? What was hard?
9. Did you look for information on exporting? If so, where? What was easy about that process? What was hard?

Changed name

1. How did you go about changing your driver's license? What was easy about the process? What was hard?
2. How did you go about getting a Social Security card with your new name? What was easy about that process? What was hard?
3. Did you have to change your name or address for any government benefits you receive, such as Social Security? What was easy about that process? What was hard?
4. Did you have to get a new passport? What was easy about that process? What was hard?
5. How did you find out how to file taxes with your new name? What was easy? What was hard?

Home — Purchased a new home

1. Where did you learn about the process of buying a home? Where did you look? Who did you ask? Visit any government websites or services? What was easy to find? What wasn't?
2. Did you look for suggestions about finding a good lender? Where did you look? Any government websites or services? What was easy to find? What was hard to find?
3. Have you had to file a complaint against a lender? What was easy? What was hard?
4. Did you look at loans sponsored by the Federal Housing Administration? How did you find them? What was easy to understand? What wasn't?

Lost job

1. Did you file for employment benefits? If so, where did you find the right form? Where did you submit it? Did anyone help you out?
2. Did you apply for other forms of help, like food stamps, help paying your mortgage, or educational assistance? How did you learn about this program? How did you apply? What was easy? What was hard?
3. Did you try to file a complaint or a lawsuit against your former employer? Where did you go to find out what to do? Any government websites or services? What was easy? What wasn't?

Medicare — Enrolled in or changed plan

1. How did you find out whether you were eligible for Medicare? Did you look online? Call? Ask someone for help? What was easy to find out? What was hard?
2. How did you learn what the different parts of Medicare are? Did you look online? Call? Ask someone for help? What was easy to understand? What was hard?
3. How did you decide what form of Medicare coverage to get? Did you look online? Call? Ask someone for help? What was easy to understand? What was hard?
4. Did you have other insurance? Did you look online? Call? Ask someone for help? What was easy to understand? What was hard?
5. Did you receive an Initial Enrollment Questionnaire in the mail? Or did you fill one out online? What was that like? What parts of the process were easy? What was hard?

New job

1. What forms did you fill out when you started a new job? How did you submit your forms? What was filling out the forms like? What was easy? What was hard?
2. What was filing taxes like after you started your new job? Where did you find information if you had questions? What was easy? What was hard?

Social Security — Applied for or received benefits for the first time

1. What kind of benefits did you apply for? How did you decide when to apply for Social Security? What websites did you visit? What people did you ask?
2. How did you submit your Social Security application? Online? On the phone? In the mail? What was easy about that process? What was hard? Anyone help you out?
3. When you had a question about applying for benefits, what did you do? Call? Email? Look online? What was easy about getting your question answered? What was hard?
4. How did you receive a new Social Security card? What was easy? What was hard?

Student loans

1. How did you apply for student loans? How did you find out what you needed to do? Who helped you? What was easy about the process? What was hard?
2. Did you fill out the FAFSA? If so, how? What was easy about the process? What was hard?
3. Before you received your loans, did you have to go through an entry counseling course? What was that like?

Traveled via air

1. What was easy about going through security at the airport? What was hard?
2. Did you look up any information about security before flying? Where did you look? Any government websites or services? What was easy to find? Hard?
3. Have you ever filed a complaint against an airline? How did you do that? What was easy? What was hard?
4. Have you applied for TSA PreCheck or Global Entry? What was that process like? What was easy? What was hard?

Traveled internationally

1. Did you have to get a new passport or renew your passport? If so, what was easy about that process? What was hard?
2. Did you look for information about the safety in the country you were visiting? Where did you look? Any government websites or services? What was useful? What wasn't?
3. Did you look for information about required vaccinations? Where did you look? Any government websites or services? What was useful? What wasn't?
4. Did you have to apply for a visa to travel abroad? Where did you look? Any government websites or services? What was useful? What wasn't?
5. Did you have contact with a U.S. embassy while you were abroad? How did you find it? What was your experience like?
6. Did you go through customs and border patrol?

Traveled to a national park, monument, or other public lands

1. How did you chose to visit a national park, monument, or another public land?
2. How did you learn about what there was to do there? Visit any government websites or services? What was easy? What was hard?
3. Did you make a reservation for a campground or group activity? How did you do it? Visit any government websites or services?

Appendix C-1: College campus intercept interview guide

The ask

Hi, I'm conducting a research study. Do you have a few minutes to talk to me about the financial aid process and how it could be improved?

[if no]

Have you done any of the following in the past year?

- Applied for student loans
- Started a new job
- Lost a job
- Started a new business
- Purchased a home
- Changed your name
- Travelled internationally
- Travelled via air
- Travelled to a national park, monument, or other public land

[end if]

Would you be willing to talk to us about it?

Introduction (2 minutes)

My name is [your name] and I'm working on a project for the U.S. government's General Services Administration. Thank you so much for agreeing to participate in this interview! Also with me is [note taker's name], who will help by taking notes today.

Today, we'd like to talk to you about your experience [signing up for Social Security / applying for financial aid].

Your answers will help us understand how we can make interacting with the government easier.

Your participation in this interview is completely voluntary.

We will keep your responses anonymous will not write your name on our interview notes. We will store them in a secure place where only team members can access it.

This consent form summarizes this information and some other project background.

At the bottom, you can choose whether we may share quotes from your interview. Unless you give us permission, we will not share any quotes from your interview (even anonymized ones) outside our project team. If you're open to us sharing quotes in reports to our project team or in blog posts that describe our project, check the box below the signature lines.

Take a few minutes to read over the consent form and sign the consent form. Feel free to ask me any questions that come up!

This interview will take about 15 minutes.

Do you have any questions for me before you get started? You can also ask questions at any point during the interview.

Delving in (13 minutes)

1. How did you go about handling [interaction]? Walk me through, the best you can remember, the steps you took during and after the [interaction].

2. What institutions did you interact with during [interaction]?

For each step, ask about what institutions they interacted with and what their goals were for each interaction. This is the opportunity to surface “touch points,” but we should avoid using that language explicitly or asking, “When did you interact with the federal government?”

3. What were the easiest parts of dealing with [interaction]? What made them easy?

Ask for more detail on easy parts that involve the federal government.

4. Looking back, what were the most difficult parts of dealing with [interaction]? What made them difficult?

- a. Can you tell me about frustrations you had with the government during these processes?
- b. What would have made your interactions with the government easier during this time?

5. [If applicable and if time] During the [interaction], were you asked to provide information about yourself to the government? Can you tell me a little more about this process? Is there anything that could have been done to make this process easier for you?

6. [If applicable and if time] How do you feel when you have to share that information with the government?

7. [If applicable and if time] You had to give your information to a couple different agencies in the course of dealing with [interaction]. How would feel about one of those agencies sharing that information with the other?

8. If you filled out a form on [agency’s] website and they offered you an option to share this information with [other agency] so that you would have access to [benefits from other agency], would you be more likely to consider sharing your information?

Specific questions for financial aid (if you get stuck)

1. How did you apply for financial aid? How did you find out what you needed to do? Who helped you? What was easy about the process? What was hard?

2. Did you fill out the FAFSA? If so, how? What was easy about the process? What was hard?

3. Before you received your financial aid, did you have to go through an entry counseling course? What was that like?

Conclusion

Thank you again for sharing your story and thoughts with me. We really appreciate your help. Do you have any other questions or thoughts for me?

Appendix C-2: Senior center intercept interview guide

The ask

Hi, have you recently applied for Social Security benefits or Medicare for the first time?

OR

Hi there! Hi, I'm conducting a research study. Would you be willing to answer a few questions about making applying for Social Security or Medicare easier?

[if no]

Have you done any of the following in the past year?

- Applied for or received Social Security benefits
- Enrolled in or changed your Medicare plan
- Lost a job
- Started a new business
- Purchased a home
- Started a new job
- Changed your name
- Travelled internationally
- Travelled via air
- Travelled to a national park, monument, or other public land

[end if]

Would you be willing to talk to us about it?

Introduction (2 minutes)

My name is [your name] and I'm working on a project for the U.S. federal government's General Services Administration. Thank you so much for agreeing to participate in this interview! Also with me is [note taker's name], who will help by taking notes today.

Today, we'd like to talk to you about your experience [signing up for Social Security, or signing up for Medicare, or changing your Medicare plan]. Is there one you'd prefer to talk about?

Your answers will help us understand how we can make interacting with the government easier.

Your participation in this interview is completely voluntary.

We will keep your responses anonymous will not write your name on our interview notes. We will store them in a secure place where only team members can access them.

This consent form summarizes this information and some other project background.

At the bottom, you can choose whether we may share quotes from your interview. Unless you give us permission, we will not share any quotes from your interview (even anonymized ones) outside our project team. If you're open to us sharing quotes in reports to our project team or in blog posts that describe our project, check the box below the signature lines.

Take a few minutes to read over the consent form and sign the consent form. Feel free to ask me any questions that come up!

This interview will take about 15 minutes.

Do you have any questions for me before you get started? You can also ask questions at any point during the interview.

Delving in (13 minutes)

1. How did you go about handling [interaction]? Walk me through, the best you can remember, the steps you took during and after the [interaction].

2. What institutions did you interact with during [interaction]?

For each step, ask about what institutions they interacted with and what their goals were for each interaction. This is the opportunity to surface “touch points,” but we should avoid using that language explicitly or asking, “When did you interact with the federal government?”

3. What were the easiest parts of dealing with [interaction]? What made them easy?

Ask for more detail on easy parts that involve the federal government.

4. Looking back, what were the most difficult parts of dealing with [interaction]? What made them difficult?

a. Can you tell me about frustrations you had with the government during these processes?

b. What would have made your interactions with the government easier during this time?

5. [If applicable and if time] During the [interaction], were you asked to provide information about yourself to the government? Can you tell me a little more about this process? Is there anything that could have been done to make this process easier for you?

6. [If applicable and if time] How do you feel when you have to share that information with the government?

7. [If applicable and if time] You had to give your information to a couple different agencies in the course of dealing with [interaction]. How would feel about one of those agencies sharing that information with the other?

a. If you filled out a form on [agency’s] website and they offered you an option to share this information with [other agency] so that you would have access to [benefits from other agency], would you be more likely to consider sharing your information?

Specific questions regarding Social Security benefits (if you get stuck):

1. What kind of benefits did you apply for? How did you decide when to apply for Social Security? What websites did you visit? What people did you ask?

2. How did you submit your Social Security application? Online? On the phone? In the mail? What was easy about that process? What was hard? Anyone help you out?

3. When you had a question about applying for benefits, what did you do? Call? Email? Look online? What was easy about getting your question answered? What was hard?

4. How did you receive a new Social Security card? What was easy? What was hard?

Specific questions regarding Medicare (if you get stuck):

1. How did you find out whether you were eligible for Medicare? Did you look online? Call? Ask someone for help? What was easy to find out? What was hard?
2. How did you learn what the different parts of Medicare are? Did you look online? Call? Ask someone for help? What was easy to understand? What was hard?
3. How did you decide what form of Medicare coverage to get? Did you look online? Call? Ask someone for help? What was easy to understand? What was hard?
4. Did you have other insurance? Did you look online? Call? Ask someone for help? What was easy to understand? What was hard?
5. Did you receive an Initial Enrollment Questionnaire in the mail? Or did you fill one out online? What was that like? What parts of the process were easy? What was hard?

Conclusion

Thank you again for sharing your story and thoughts with me. We really appreciate your help. Do you have any other questions or thoughts for me?

Appendix D: Diary study invitation email

Hi [first name],

Public libraries have become one of the most important ways that many U.S. residents connect to the internet, and as such have become an important player in connecting people to government services online. In a recent study by the American Library Association, almost 79% of libraries reported that they provide assistance to patrons applying for or accessing government services online. And yet we know that many times government websites and services can be confusing and frustrating to use.

We're hoping to pinpoint exactly what kinds of challenges people have while accessing government resources online, and we need your help. Because you are on the front lines of connecting people to government information and services, you are in a unique position to be able to observe and track where things are going awry and where we could be doing better.

Here's what we're asking:

- **Read over the attached consent form and let us know if you accept the terms within.** You don't need to sign the form, just respond to this email letting us know and be sure to note if we can use anonymized quotes.
- **Answer the questions in the [online form](#) every time you have a reference interaction that involves state or federal government information.** If you prefer, you can write your answers in the body of an email or attach them in a Word document and send them to michelle.chronister@gsa.gov on a daily basis.

- **Over the course of the next few weeks, we'll send you a reminder each day.** Please fill out the diary entry form promptly so you don't forget the details. The diary entry form has five open-ended questions to help structure your response.
- **We're interested in any type of request related to government services, no matter how small.** This could include doing research on Healthcare.gov, signing up for Social Security benefits, getting information about filing taxes, changing a Medicare plan, renewing a driver's license, or any other federal or state government service. If you aren't sure about whether it's important, send it in.
- **We'd like to get at least six responses from you before November 6, but you can send in as many additional entries as you want.** The more information you can provide, the better we'll be able to identify common pain points.
- **We do not want any identifying information about your patrons, we only want to know what they were trying to accomplish and how the process went.** Patron privacy is important to us. See the attached consent form for more details.

With your expertise, we will be able to point our efforts towards the most frequent and biggest pain points that come as citizens access government services online. We hope this will make your job easier, but ultimately we believe this is the right thing to do.

This study is sponsored by the U.S. General Services Administration. Data from this study will inform the future direction of various online government sites and services, including USA.gov, GobiernoUSA.gov, Kids.gov, and others.

So, are you willing to participate in the diary study?

Appendix E: Diary study entry form

Did you help someone access online government services or information today? This could include Items related to Healthcare.gov, Social Security, Medicare or Medicaid, taxes, renewing a driver’s license, federal financial aid, or any other service at the federal or state level.

We are interested in small details—if you aren’t sure whether to put something in, please include it!.....

Your name

Please include your first and last name.

Short answer text

Who were you helping?

Please provide basic demographic information about the patron to give us some context, such as gender or approximate age (youth, adult, or senior). Please don’t provide information that could identify the person. Patron privacy is important to us.

Long answer text.....

What was the person trying to do?

Long answer text.....

What was the outcome or result?

Please describe what you did to help and if the patron was able to achieve their goal. Include whether the patron was satisfied with the government’s website, information, or service.

Long answer text.....

What, if anything, got in the way?

Include problems you had with government websites, forms, or other services, as well as concerns the patron had about the service.

Long answer text.....

Anything else you’d like to add?

Long answer text.....