Research Plan: [Program Name]

Background

Instructions: Describe factors that the research will need to account for, including any shared beliefs or forces motivating the research itself. Summarize any past or secondary research that shapes the research context. Provide links, if possible.

Goals

Instructions: Drawing on Erika Hall's Just Enough Research, use reality-oriented words like "describe", "evaluate", or "identify," and avoid words like "understand" or "explore." Inform your team's anticipated design decisions or validate its riskiest assumptions. It can also be useful to list anti-goals—things you're not looking for this research to do or clarify. See the UX Guide on Research Goals.

- Goal / objective 1
- Goal / objective 2
- Goal / objective 3

Research questions

Note: These are not the same as those posed to participants ("interview questions").

Instructions: What do you want to learn to make better evidence-based decisions? Good questions are specific, actionable, and practical; they concern the user's experience and needs. Hold a Research Alignment Workshop to collaboratively create research questions.

- Question 1
- Question 2
- Question 3

Method(s)

Instructions: Choose some Methods that are appropriate for meeting the goals and answering research questions. Methods that are commonly used on this team are listed below.

Stakeholder and User Interviews

[Describe how you will employ this method for research]

Participatory Workshops

[Describe how you will employ this method for research]

Usability Testing

[Describe how you will employ this method for research]

Research roles

> **Instructions:** Consider how research can be a team activity and decide who will hold specific research roles.

- Research lead
- Moderator
- Observer(s)

Timeline

> **Instructions:** Give a rough-estimate timeline to help manage expectations around study execution. Remember to give more time than you think you need for analysis and synthesis (a safe estimate is twice as long as you give to data collection).

Study design	[A reasonable date range]
Recruiting	[A reasonable date range]
Data collection (for example, interviews)	[A reasonable date range]
Top-line synthesis	[A reasonable date range]
Collaborative analysis	[A reasonable date range]
Collaborative synthesis	[A reasonable date range]

Outcomes	[A reasonable date range]

Participants and recruiting

To comply with the Paperwork Reduction Act (PRA), we are soliciting feedback from less than 10 external users

Instructions: Describe at a high-level who should participate in this study, and how you'll recruit them. Prepare email templates for corresponding with potential participants, including how the team will get informed consent. See the legal page of the UX Guide for more information.

User types

- User types 1 - internal or external
- User types 2 - internal or external
- User types 3 - internal or external

Recruitment email

PROGRAM INTRODUCTION

Email Subject: [Program / project name] - Feedback requested

Hi [participant name] -

Our team is working with the GSA Service Delivery team to [explain the goals of the research]. We encourage you to be as candid and inclusive as possible in your responses and comments, keeping in mind that the Service Delivery team will anonymize everything you share, and that your responses and comments will not be attributed to you in any way.

To kick things off, I'd like to introduce you to [SD name/role], a [role] on the Service Delivery team. [SD name/role], [participant name] is a [role at agency]. [participant name], [SD name] will be reaching out to you to schedule a time for you to meet with their team. If you have any additional questions or concerns, please do not hesitate to reach out to me.

Thank you,
[name]

DIRECT OUTREACH

Email Subject: [Program / project name] - Feedback requested

Hi [participant name] -

I'm part of the GSA Service Delivery team and we're working with the [program name] on [project description]. Our team is looking to understand [explain the goals of the research]. Would you have some time over the next few days to chat with us about your experiences as a [role] / working on [process]?

The session should only take an hour and will be an online video call with our team. We have a few questions to understand the current process—what's working well, what's not working, and what could be useful for you in the future. We may also have you share your screen to walk through any tools you use to support the process. Everything you share will be anonymized and your responses and comments will not be attributed to you in any way.

If you'd like to participate, please reply to this email with a time you are available on [enter times / days here] / select a time slot on our session booking page [link to page]. If you don't see a time that works for you, just let me know and I can schedule something separately with you. Also, if you have any questions about the project in the meantime, please feel free to reach out to me.

Thank you,
[name]

Ethical and bias considerations

Instructions: Document the ethical principles or concerns that influence this research approach. Discuss as a team the biases that could influence the work. Consider whether the research includes topics that may remind participants of trauma, and consider trauma-informed approaches to interviews.

- Consideration 1
- Consideration 2
- Consideration 3

Expected outcomes

- Outputs
  - Deliverable 1
  - Deliverable 2
- Outcomes
  - Outcome 1
  - Outcome 2

References

Just Enough Research by Erika Hall

SAMHSA's *Concept of Trauma and Guidance for a Trauma-Informed Approach*

18F's 📄 Research plan [template]