

**Appendix B**  
**NCSES Data Tools and Product Usability Testing**  
**Recruitment Script**  
**Contact and Scheduling Email**

**Initial contact by NSF**

Dear <Name>,

The National Science Foundation's (NSF) National Center for Science and Engineering Statistics (NCSES) is the principle source of analytical and statistical reports, data, and related information that describe and provide insight into the nation's science and engineering resources. To support this analysis and dissemination, NCSES's data is made available to the public on the internet via a variety of tools and products ranging from public microdata to table-building tools to state and institution reports. In an effort to improve these products and tools, we are looking for people who are willing to participate in testing a few of the data tools and products by performing a few tasks and giving feedback.

**What will I be doing in this study?**

You will be asked by our partners SRI International and Phase2 to do several short tasks using the NCSES website. You will also be asked questions about your experience and perceptions of the website. Neither your name nor your organization will be reported in connection to any specific comments or results.

**How long will it take?** 45 to 60 minutes

**When and where?**

The study will be held [DAYS, DATES]. You will be asked to participate in the study by phone and computer. No traveling is required as this is a remote study that will be performed online. You may participate using your office or home computer.

**Why are you contacting me?**

Our team has identified you as someone who has an interest in data and reports related to the nation's science and engineering resources. You have either contacted NSF for a report, data, or tool; you have published a report or paper related to this topic, or you have been suggested to us as someone who could help us.

Phase2 will follow up with you directly about scheduling an appointment. Please reply to that email if you are willing to help us in this important study.

If you have any questions, please contact me at [EMAIL]. If you do not receive the follow-up email or want to contact the testing team directly, please contact Christina Freyman at [christina.freyman@sri.com](mailto:christina.freyman@sri.com) or 703-247-8778.

Thank you for interest,

[NAME AND TITLE]

RE: NSF/National Center for Science and Engineering Statistics Usability Testing

Dear <Name>,

Within the last week, [name] at the National Science Foundation (NSF) sent you an email asking for your help in testing of its data tools and products. I am writing to follow-up on that email, which is included below.

Please reply back to me to let me know when you would be willing to participate in a 45–60 minute meeting, or if you have any questions. If I don't hear from you by [date], I will try to reach you by phone.

Thank you for your time and consideration.

Sincerely,  
<name, contact information>

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Dear <Name>,

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Thank you for interest,

[NAME AND TITLE]

**Follow-up phone call**

*Call to people who did not respond to the email.*

Hello, my name is <name> and I work for SRI International/Phase 2. We are working with the National Center for Science and Engineering Statistics to test parts of their website. I am calling to follow up on an email that I sent you last week to ask if you would help us.

Did you receive the emails?

*If yes*

Are you willing to participate?

*If yes*

Thank you. When would be a good time to schedule the meeting? <Give some scheduling parameters> I will be joined by a note taker. You will receive a confirmation email with the details of how to join the online testing session along with an informed consent form.

*If no*

I understand. Thank you for your time.

*If they did not receive the email.*

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Your comments will not be attributed publicly with your name or organization.

Would you be willing to participate in a 45-60 minute interview on this topic?

*If yes*

Thank you. When would be a good time to schedule the meeting? <Give some scheduling parameters> I will be joined by a note taker. You will receive a confirmation email with the details of how to join the online testing session along with the informed consent form.

*If no*

I understand. Thank you for your time.

**Confirmation email**

Thank you for helping the National Center for Science and Engineering Statistics evaluate parts of its website. This email serves as confirmation of the time of our appointment.

Interview Date and Time: <DATE>, <TIME> a.m. /p.m.

If for any reason you need to reschedule the interview, please contact <Recruiter's name> by telephone at <number> or by e-mail <insert email address> as soon as possible.

Participant instructions for preparing for the session:

1. Please visit the following URL in order to ensure you are able to connect to GoToMeeting: <https://www3.gotomeeting.com/join/406552062>.
2. At the time of the session, you will be asked to click a link to join a GoToMeeting session.
3. In addition to joining the online meeting, you will be asked to dial in by phone. (If you have a headset or a computer with a mic and speakers, you may simply use your computer instead of calling in.)
4. I am attaching a consent form that each person who participates in the interview should read. Please sign and return to me via email. (Electronic signatures are fine.) If you cannot sign and return, at the beginning of the interview we will review the form and ask for your consent verbally.

Below are the instructions for the telephone call and for joining the GoToMeeting web-conference.

Meeting Number: 111 111 111

1. Please join my meeting. [https://global.gotomeeting.com/join/\\*\\*\\*](https://global.gotomeeting.com/join/***)
2. If using your microphone and speakers (VoIP) - a headset is recommended.
  - a. Otherwise, call in using your telephone.
  - b. United States: +1 (872) 240-3212
  - c. Access Code: 111-111-111
  - d. Audio PIN: Shown after joining the meeting
  - e. Meeting ID: 111-111-111

**IMPORTANT NOTICE:** This web-conference service includes a feature that allows audio and any documents and other materials exchanged or viewed during the session to be recorded. By joining this session, you automatically consent to such recordings. If you do not consent to the recording, discuss your concerns with the meeting host prior to the start of the recording or do not join the session.

Thank you for your time and we look forward to speaking with you.

<Name and contact information>