

**United States Patent and Trademark Office (USPTO)  
Council for Inclusive Innovation (CI<sup>2</sup>)  
Digital Discussion Board Screener Overview**

**This information below is for the project team and will not to be shared with discussion board participants.**

**Purpose:** CMRignite will gather audience insights to qualitatively and quantitatively explore perceptions, motivators, and barriers to innovation, perceptions of USPTO and CI<sup>2</sup> as well as communications needs and preferences, including factors impacting user experience on a microsite.

**Target Audience:**

People interested in exploring innovation and inventions and ensuring inclusivity of individuals who are in underserved communities and/or are underrepresented patentees:

- Those in economically disadvantage communities in the U.S.
- Those residing in the south and rural areas of the U.S.
- People who are Black/AA, Hispanic, and Native American/Alaska Native
- Females
- Military veterans
- Those in various stages of behavioral readiness for exploring innovation

**Methodology:** CMRignite takes a human-centered design approach for research. Knowing our target audience, we will be using a digital discussion board to gather qualitative and quantitative insights because it is an innovative and engaging way to capture audience insights and provides flexibility for participants to engage at their convenience.

CMRignite will conduct asynchronous research via a digital discussion board with 50-100 participants representing the target audience.

Asynchronous research means that the participants have a defined time frame (approximately two weeks) to participate in the discussion board, but they do not have to join at any specific date/time to engage with others as long as they complete the activities. They join the board and engage with the moderator and others based on times that are convenient for them to participate during the defined time frame.

A digital discussion board is an interactive online platform (a similar look and feel as a Facebook platform). We ask participants to answer open-ended questions to share their free responses for qualitative data, or to respond to polls to answer single or multiple-choice questions for quantitative data. As people respond, they can engage with other participants by reacting to others' responses, so it accomplishes the social interaction that is achieved when conducting a focus group. Also, we can spark engagement and interaction by using different question formats and providing the opportunity for people to share text, photos, and videos to illustrate their opinions and experiences.

## **Assumptions:**

- We will conduct the discussion board over a two-week time period with the flexibility to extend the duration if participants need more time to participate in certain activities.
- We seek to use incentives under extraordinary circumstances because encouraging underrepresented communities to participate in research can be challenging as they often are hesitant to participate in research due to time commitments, historical mistrust of government agencies, and historical mistrust towards research. Incentives demonstrate our appreciation of their participation. After successful completion of the discussion board activities, participants will receive \$100 electronic gift cards via emails through a digital incentive platform called Rybbon/BHN Rewards. The platform has data protection and security systems in place to protect personal identifiable information.
- Participants will have the option to provide feedback on ad concepts. If they choose to participate, they will receive \$50 through the digital incentive platform after successful completion of concept testing.

## **Recruitment and Screening**

CMRignite will recruit the target audience using a marketing list procured from our partner sample provider, Marketing Systems Group. We share additional details as follows:

- We will send invitations to a sample of the target audience about the purpose of the study and details about the discussion board through email and text messages.
- The invitations will include a link to a registration form to answer screening questions to see if interested individuals qualify. If they prefer to call or text, they can contact CMRignite directly.
- We will follow-up with each individual who has qualified and registered for the discussion board to ensure they sign the consent form and can successfully access the discussion board. We also remind them of upcoming discussion board activities.
- We will use the following communications to recruit participants for the discussion board. They include a link to access the registration form (screener) to see if they qualify.

## **Recruiting Email**

### **OMB Information:**

*A Federal agency may not conduct or sponsor, and a person is not required to respond to, nor shall a person be subject to a penalty for failure to comply with an information collection subject to the requirements of the Paperwork Reduction Act of 1995, unless the information collection has a valid OMB Control Number. The OMB Control Number for this information collection is 0651-0080. Public burden for this screening is estimated to average 5 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the information collection. Send comments regarding this burden estimate or any other aspect of this information collection, including suggestions for reducing this burden to the Office of the Chief Administrative Officer, United States Patent and Trademark Office, P.O. Box 1450, Alexandria, VA 22313-1450 or email [InformationCollection@uspto.gov](mailto:InformationCollection@uspto.gov).*

Good Morning/Afternoon,

The U.S. Patent and Trademark Office (USPTO) is an agency that supports people who come up with unique ideas, creations, and inventions. On behalf of the agency, we are hosting an online group chat with people across the country to gather their thoughts about how to support people who like to come up with new ideas, solutions to problems, and trying new things.

Please consider joining us from September x to x, for an online group chat, similar to a social media platform where you can share your thoughts with others. Here are more details:

- There will be a total of around 50-100 people in the group chat (discussion board).
- The chat is live from September x to x, but you can choose the days/times you take part in the chat in that time frame.
- If you qualify and answer all the questions will receive a \$100 electronic gift card as a thank you.
- The group chat is private – only members of our project can observe the chat.
- People do not share their full names and personal contact information. You can choose how much to share about yourself.
- We will prepare a report based on the key themes we observe; names will not be included in the report.
- The report will be for internal use only to help improve the ways USPTO shares information about the services they provide.
- It is your choice to take part in the group chat, and you can stop at any time.
- We can help you connect to the group chat ahead of time, and you can use your computer, phone, or tablet to join.

If you choose to take part in the group chat, please click on this link or copy and paste it into your browser to see if you qualify:

**[Insert link]**

Another option is to contact us directly at [interviews@cmrignite.com](mailto:interviews@cmrignite.com) or [insert phone number], for more information.

We hope you can join us! Thank you!

[Insert CMRignite contact and email signature]

### **Recruiting Text Message [must be 160 characters or less]**

U.S. Patent & Trademark Office invites you to online chat about inventions on 9/x-9/x. \$100 if qualify&finish OMB # 0651-0080; exp XX/XX/XXXX: **[insert bitly link]**

### **Screening Questions**

When people click on the link in the invitation, we will direct them to a digital registration form (screener). We use the questions to qualify/disqualify participants and to monitor characteristics of participants to ensure we are inclusive of the target audience. The bold labels for each group

of questions indicate their purpose (participants won't see the labels). We use red text to indicate if the participant's response does not qualify for them for the group based on our target audience criteria.

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## Introduction

Please answer the following questions to see if you qualify for the online group chat for the U.S. Patent and Trademark Office (USPTO). The chat is for people to share their thoughts about how USPTO can support people with new ideas, solutions to problems, and trying new things. Your responses are private and will be used to ensure we include a variety of people across the U.S.

### Questions to ensure we include people from underserved communities:

1) **In which state do you live?** (Select one)

2) **What is your age group?** (Select one)

Less than 18 years old [Research with minors requires additional OMB Clearance;  
Thank, disqualify, and end survey]

18-24

25-34

35-44

45-54

55-64

65-74

75 years or older

3) **What is the highest level of school you completed?** (Select one)

No high school diploma or GED

High school diploma or GED

Some college, no degree  
College degree or vocational training degree or certificate (2-year program)  
College degree (4-year program) [Disqualify and end survey]  
Master's/Graduate degree or higher [Disqualify and end survey]

**4) What is the combined income of all members of your household for the past 12 months (before taxes and from all sources)? (Select one)**

Less than \$10,000  
\$10,000 to under \$25,000  
\$25,000 to under \$50,000  
\$50,000 to under \$75,000  
\$75,000 to under \$100,000 [Disqualify and end survey]  
\$100,000 to under \$150,000 [Disqualify and end survey]  
\$150,000 to under \$200,000 [Disqualify and end survey]  
\$200,000 or more [Disqualify and end survey]

**Behavioral readiness for innovation:**

**5) Please select the statements that apply to you.**

You...(Select all that apply)

[Randomize]

- a. Are interested in creating new ideas or new things
- b. Are interested in solving problems
- c. Have thought about a new idea, creation, or solution
- d. Have started working on a new idea, creation, or solution
- e. Have created a new idea or solution to a problem
- f. Have thought about applying for a patent (a patent is like a special, legal permission slip the government gives you that says you're the only one who can make, use, or sell your idea for a certain number of years)
- g. Are a sole or part owner of a patent
- h. Are in the process of obtaining a patent
- i. Have previously applied for a patent
- j. Consider yourself to be an inventor
- k. None of these [Disqualify and end survey]

**Questions we will monitor to ensure underrepresented patentees are included:**

**6) What is your gender? (Select one)**

Male  
Female  
Not listed here/I prefer to self-describe: (specify)

**7) Are you of Spanish, Hispanic, or Latino origin? (Select one)**

Yes

No

**8) What racial/ethnic group best describes you? (Select one)**

American Indian or Alaska Native  
Asian/Pacific Islander  
Black/African American  
White/Caucasian  
Other (specify)

**9) Do you speak more than one language in your household? (Select one)**

Yes  
No

**10) Were you born in the United States? (Select one)**

Yes  
No

**11) Have you ever served on active duty in the U.S. armed forces?(Army, Marine Corps, Navy, Air Force, Coast Guard) (Select one)**

Yes  
No

**12) Do you live in a rural area (less than 2,500 people)? (Select one)**

Yes  
No

**Qualified Participant Information**

Thank you for answering these questions. You qualify to take part in the group chat (discussion board). The group chat will take place from September x to x. You can join at any time during these dates to complete the activities.

**13) Do you want to be a part of the group chat (discussion board) from September x to x? (Select one)**

Yes  
No

**14) Please provide your information below. It will be kept private and will not be shared with anyone outside our team.**

Name:  
Email address:  
Mobile phone (include area code):

**15) [If unavailable to participate] If you would like to be added to a wait list in case we have other activities, please provide your contact information:**

Name:  
Email address:  
Mobile phone (include area code):

**End Messages**

Qualified participants: We will contact you soon to share more details about the group chat. We thank you for registering for the discussion board!

Qualified participants who are unavailable: We thank you for your willingness to participate. We will reach out to you if we have other activities.

Disqualified participants: We are sorry you do not qualify but we greatly appreciate your time and interest. We will reach out to you again if we have other activities. You may close your browser.

For Qualified participants who will participate in the Discussion Board:

**Consent Form**

OMB Control No. 0651-0080 Expiration Date: XX/XX/XXXX

**Informed Consent for Research Participation:**

Thanks for taking the time to complete the questions in the chat. Please read the statements below and electronically sign where indicated.

By submitting this form you are indicating that you have read the description of the study and that you agree to the terms as described.

If you have any questions, or would like a copy of this consent form, please contact [interviews@cmrignite.com](mailto:interviews@cmrignite.com).

**What this study is about**

This group chat/discussion board is being conducted by the CMRignite on behalf of the U.S. Patent and Trademark Office (USPTO). The questions are about enhancing the information and resources provided by USPTO to people who may submit patents or who may need other legal protections for their ideas or creations.

**Your Involvement in the Study**

We will ask you a series of questions about your awareness of USPTO, awareness of protections for ideas and creations, and your opinions about information and resources that could support you. The discussion board activities should take a maximum of 90 minutes total over two weeks.

### **Your Participation is Voluntary**

Participation is completely voluntary. You may refuse to answer any questions or end participation at any time.

### **Confidentiality**

We will take necessary and appropriate precautions to keep what you tell us confidential. We may develop and present research reports that summarize the results of all the participants who complete the survey. The reports are for internal use only. We will not use your real name in any of our materials.

### **Storage of Personal Information and Session Data**

We will securely store and process your personal information and session data until we deem the content no longer necessary for the research purposes outlined above. This data can include your name, email address, and phone number.

### **Statement of Consent**

I have read the above information and received answers to any questions I have asked. I consent to take part in this survey and to have any information I provide be used in the manner described above. I understand that my name will not be used in connection to responses. I expressly release CMRignite from and against any and all claims that I have or may have for invasion of privacy, defamation, or any other cause of action arising out of the production, distribution, display, or publication of the results of the project, so long as the conditions of use described above are met.

**Click to electronically sign**

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