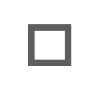
**Transcript**

July 7, 2025, 5:03PM

 **Brian Mills** started transcription

 **Todd Helmus** 0:03  
As as well as benefits.  
So.  
Wanna start doing introductions and then I can.  
I'll give you an overview of the types of questions we'll be asking and then go into it.  
Does anybody have any concerns if we transcribe this conversation?

 **Lynn Karoly** 0:24  
Yep.

 **Todd Helmus** 0:25  
One background method 1 background issue on sort of consent form is you know sort of describe the purpose of this effort and I hope that we can all learn from each other.  
I I'm finding these conversations very helpful in terms of what people are doing at Rand.  
I think oftentimes we don't have these types of conversations with diverse groups and the whole point of this is to bring a diverse group of people together. And I'll note that the, the, the, this, the thread that binds a lot of the folks on this call.  
All is the use of multi methods.  
So hope to have a conversation on that, but again, you know, please keep we won't be taking any citing any names in connection of the remarks.  
We'll be doing our our best effort to not have anything connected to you by inference.  
And.  
So and of course, you know, we'll keep level confidentiality in this in this conversation and protect the things that that we share with each other on this call.  
Any questions about all of that?  
OK, great. So I have a series of questions, but before we go into it, I think it'd be helpful to have introductions and I'd be curious as we go around the Horn.  
Undo intros. Obviously your name.  
I'm curious what area that you work in.  
So the topical subjects that you address in your work and then also what methods, what research methods do you apply in your work most often?  
And I'll just start Todd Helmus, I do work on mostly national security.  
30 stuff, but a lot of information, threats, terrorist radicalization, recruitment. Probably my most common methodology is, is qualitative interviewing, though I've done social media analytics and surveys and things like that.  
And I'll just.  
I'll just name folks at the top of my list as I have them here.  
So the top of my list is Carolyn.

 **Caroline Johnston** 2:26  
Hi everyone.  
I'm Caroline.  
I'm an associate operations researcher.  
I just started at Rand about two or three months ago, which may be relevant depending on what I say in this focus group.  
My primary methods are quantitative, so I'm a optimizer.  
I do.  
A lot of modeling, simulation coding, but I have some previous experience with qualitative methods, some surveys, interviews, stuff like that.  
My research before I joined.  
Brand was primarily in public health.  
How do we design optimization methods to figure out people's preferences for policies in public health and the outcomes of those policies?  
But here at Rand, I've been joining some path projects working on staffing optimization models.  
How do we, you know, more effectively staff people in the Air Force?  
I think that was everything, Todd, that you were looking for is that.

 **Todd Helmus** 3:18  
Thank you.  
Is that is is the optimization piece.  
Is that like econometrics or like how else would you describe that?

 **Caroline Johnston** 3:22  
It's yeah. Math modeling.  
So we have, you know, variables that describe levels of things.  
We have an objective function, right?  
What do we want to optimize?  
You know, could be, you know, minimizing cost, you know maximizing utility.  
That sounds a little more like econometrics and then subject to, you know, all of your real world constraints.  
So like for staffing, it's like we only have so many people we can use, right?  
So your model can't exceed that total number of people.  
That kind of idea.

 **Todd Helmus** 3:52  
Got it.  
Thank you. Thank you.  
Hi Shannon. Go ahead.

 **Shannon Walsh** 3:57  
Hi, I'm Shannon.  
I am a second year PhD here at Rand as well as an assistant policy researcher.  
I have been able to contribute to a few different projects around AI, specifically looking at I guess counter bioterrorism and AI as it relates to chemical and biological weapons and also a project looking at.  
AI trust with warfighters.  
I also do a lot of healthcare projects.

 **Todd Helmus** 4:32  
And what methods? What methods would you be applying to those problem sets?

 **Shannon Walsh** 4:38  
So I actually do quantitative and qualitative analysis. A lot of my healthcare projects are focused on qualitative data collection. And then when we finish collecting the data, I have done some quantitative analysis on the results that we got.

 **Todd Helmus** 4:57  
OK, awesome. Thank you.

 **Shannon Walsh** 4:58  
Thank you.

 **Todd Helmus** 5:00  
Hi, Lynn.

 **Lynn Karoly** 5:01  
Hey, morning everyone or wherever you are.  
I guess it's afternoon even for me.  
I'm Lynn, Carolyn.  
I'm a senior economist at Rand.  
I came in 1988, so I'll let you do the math.  
I've been around a long time. Most of my work is on what we would call the domestic policy side of bringing research on families and children and the programs that serve them do a lot of work. Also on early childhood policy.  
In in particular.  
So most of my work is more quantitative.  
Either using existing data or collecting primary data to look at the either descriptively at inputs and outcomes, or to try to model.  
Cause and effect.  
I also do a fair amount of cost benefit analysis, including collecting and analyzing costs and then converting.  
The impacts of programs or policies into dollar valuation to look at, which is bigger costs or benefits.  
What else was I supposed to say?  
I think that covers. Yeah. Good. All right.

 **Todd Helmus** 6:14  
That's it. I think that covers it. Thank you. Hi, Emily.

 **Emily Lathrop** 6:22  
I'm lilithre up.  
I'm an associate engineer.  
I work mostly in AI unmanned systems.  
Robotics topics related to those areas.  
In terms of methods, some kind of across the board subclan data, some qualitative qualitative would be mostly things like interviewing workshops, things of that nature, quantitative.  
Modeling type things.  
Specifically.  
Like multi agent system type things or kind of game theory models.  
Over.

 **Todd Helmus** 7:01  
Awesome. Thank you, Christina.

 **Khrystyna Holynska** 7:05  
Everyone. I'm Christina Holland sky.  
I'm a policy researcher.  
I have been working mostly in primarily in national security, in information warfare on crude systems, great power competition, more strategy related projects.  
I am using qualitative methods only recently and I've been drawn.  
Into interview work quite a lot.  
So it's been mostly interviews.  
Lately I've been also using case studies and some social media analysis, but there was some time ago.  
Thank you.

 **Todd Helmus** 7:44  
Thank you, Catherine.

 **Katherine Watkins** 7:47  
Hi I'm actually a clinician and so I mostly consume research.  
I'm familiar with quantitative and qualitative methods, but I run big teams and people on my teams do that research, and then I put it together and think about.

 **Todd Helmus** 8:02  
Understand.

 **Katherine Watkins** 8:02  
How the clinical implications I work in the area of healthcare and specifically how to increase access and quality to mental health and substance use care.  
So I'm not sure what my methods are.

 **Todd Helmus** 8:18  
OK. But I think you you provide as a as the as as as the as the as a consumer.

 **Katherine Watkins** 8:18  
Other than I think.

 **Todd Helmus** 8:23  
I think you'll probably have some observations about the value add on some of what you see. Maybe last but.

 **Katherine Watkins** 8:26  
Great. And I run big projects.

 **Todd Helmus** 8:31  
There you go. So that's helpful, Brian.

 **Katherine Watkins** 8:32  
So.

 **Bryan Frederick** 8:36  
Hey everyone, Brian Frederick. I'm a senior political scientist.  
Also, currently the director of the Defense of Political Sciences Department, DPS.  
My research is mostly on Interstate conflict and competition.  
A lot of deterrence, escalation management issues relating to equally between China and Russia work across the DoD FRECS pretty broadly.  
Methods wise do a lot of qualitative.  
Stuff interviews, focus groups, lit review, historical archival analysis, stuff sort of thing.  
But I've also done a decent amount of quantitative stuff.  
Statistical analysis, forecasting large data models, that sort of thing.  
So a little bit all over the place.

 **Todd Helmus** 9:24  
Awesome. Thanks everyone.  
And Brian, you want a quick introduce yourself?

 **Brian Mills** 9:29  
I'm a student at the grad school here and I do social network analysis and AI and data structuring type things.

 **Todd Helmus** 9:38  
Collating this with me.  
So I think we've, I think.  
Succeeded in anything.  
It's bringing a diverse group of people into this conversation. I'll note that we've had, like, some very focused conversations.  
I think we'll try and have one with statisticians.  
We've had one qualitative researchers, I think this is a a go at bringing sort of a diverse group together.  
I'll start by this question.  
Question.  
Thinking about curious thinking about high impact work at Rand, given the the over the purview that you all have with the different work that you're doing and the different work that you've seen at your time at Rand and just curious your take on methods that you see as.  
Being high impact and is that even a legitimate question to ask?

 **Katherine Watkins** 10:35  
I don't know that the methods are high impact.  
The topics are high impact and the questions that we ask are high impact.

 **Todd Helmus** 10:39  
No exciting.

 **Katherine Watkins** 10:43  
And then the methods might be relatively.  
Straightforward. Not always, but.  
I think it's like, yeah, it's the questions and how we approach a question, how we think about it, how it brings together.

 **Todd Helmus** 10:55  
Answer questions.

 **Katherine Watkins** 11:01  
Different perspectives.

 **Todd Helmus** 11:03  
Is it the meta aspect of the question, like how it's done is important or are there some questions that you see as particularly important?

 **Katherine Watkins** 11:15  
Well, in my mind it's like the quality of our Healthcare is terrible and people don't have access.

 **Todd Helmus** 11:19  
Yeah.

 **Katherine Watkins** 11:22  
And so how do we increase?  
I do it for mental health and substance use, but how do you how do you get people quality healthcare that?  
That improves outcomes.

 **Todd Helmus** 11:35  
And in that domain, do you see?  
All methods being equally valuable. It's just a matter of how they're applied to the questions that are asked.  
Or or in your work. Do you see some types of approaches, particularly valuable?

 **Katherine Watkins** 11:53  
No, it depends on the question.

 **Todd Helmus** 11:54  
Depends on the question.

 **Katherine Watkins** 11:56  
Yeah.

 **Todd Helmus** 11:58  
All right.  
That's helpful. Thanks, Catherine.  
Any other thoughts on?

 **Lynn Karoly** 12:03  
Yeah, I'd. I'd agree that often.  
The impact is around the question or answer. Asking more so than the methods, although I think they're, you know is, you know, they're classic examples of Rand work where we're applying methods in new ways to answer questions that either haven't been, you know, asked and answered before or.  
Maybe have been asked and answered poorly.  
So we're applying the appropriate methods.  
Or advances in methods to answer, you know, vital questions. So the methods can be important, but they also just may be, you know, a brand of regression.  
Or, you know, collected some new data, but it's, you know, often that you've looked at the issue in a new way.  
You've gone collected data where there was none before and maybe there was none before because it's a challenging area to collect.  
You know the right information.  
So I think it's a a combination you won't.  
The methods won't always be the star, you know, but they can be.

 **Todd Helmus** 13:08  
Is is there no way of framing that hypothesis generation?

 **Lynn Karoly** 13:14  
I think it's maybe it's that, but it's also applying the right methods to the question you're asking, and often it ran. That might mean mixed mixed methods.  
I heard a lot of people talk about that.  
They've, you know, we're using both qualitative and quantitative work and and you know and that is partly you know we form teams to do that.  
I don't always do the qualitative work, but it's a part of the overall.  
You know, research project.  
So I I yeah, part of it.  
Is that we go about asking the relevant questions and then, you know, applying the the methods, but often in the new or innovative way or we can approach questions more broadly than other, you know, research organizations.

 **Todd Helmus** 14:00  
Emily.

 **Emily Lathrop** 14:03  
I would say if you're looking for specifically methods, something that comes to mind is like wargaming for example, like I would say, wargaming is a method. That brand is very well known for and so I think that there are occasional examples of high impact methods, although I would.  
Generally agree with everything else that has been said here already.

 **Todd Helmus** 14:24  
It's definitely a growth industry.

 **Emily Lathrop** 14:31  
Yeah, I think a growth industry and also something that Rand is known for.

 **Todd Helmus** 14:35  
Yep.

 **Emily Lathrop** 14:36  
Like if you would like a war gaming expert, you would come to Rand.

 **Todd Helmus** 14:41  
Are there thinking about the tools that you all sort of identified that the different methods?  
Or at least a handful of the methods that you apply or consume or or. And I'm just curious, are any of those ones that you use most often?  
Are sort of go to approaches. I know like some folks are doing mostly qualitative work of those who are doing mixed methods.  
Are there?  
Approaches that that you find yourself leaning on most of the time.  
Brian.

 **Bryan Frederick** 15:22  
I think most projects I've done probably have had subject matter expert interviews as a component to that. On some level. I mean to where in the you know sequence of the research it occurs and is most useful can vary but.  
Like most everything I've done has been some aspect of that.

 **Todd Helmus** 15:43  
I'm just curious to raise a hands.  
How many folks have used sort of subject matter expert interviews?  
Qualitative data collection.  
All right, so a few.  
So let's let's let's take a moment and and and we'll pause on that and then we'll move over and talk on the more quantitative side.  
Thinking about those qualitative methods that you've used.  
What would you say is the most challenging aspect of that method of of that approach?  
And you can think about challenging as in the most time consuming, the most difficult the most, the hardest to get right.  
Umm.  
Christina.

 **Khrystyna Holynska** 16:34  
Well, I think that it's not the most consuming, but definitely the hardest is to find the right questions, as if have the designed the right protocol. Because to do that you need the most knowledgeable people, experts who can give you the most information, but then you're doing your.  
Test protocol on them and you cannot come back to them once you refine the protocol.  
So there is a balance between.  
Talking to the right people in the very beginning.  
And getting everything right and then scaling up versus trying from the bottom, getting to the very best version of your protocol and then talking to these few people who give you the most information so that the balance of finding the right between when you stop designing and start.  
Scaling up and when you are still.  
Forming the protocol and asking the questions.

 **Todd Helmus** 17:30  
That's that's really helpful, Lynn.

 **Bryan Frederick** 17:37  
Sorry, Lynn, you're muted.

 **Lynn Karoly** 17:42  
Thank you. I'd say from the more quantitative side, the biggest investments in time and energy are when new data collection is involved and you know beyond.  
Interviews where you might be talking to you know, tens, 20 subjects, you know, we're talking about thousands of cases, hundreds of cases.  
So designing the data collection instrument in many cases we have to get very.  
Kinds of permissions to collect the data.  
Collecting the data, you know all before you can do any any analytic work.

 **Todd Helmus** 18:18  
OK.

 **Lynn Karoly** 18:19  
So that's probably the biggest time time investment. I would say it again, when data are absent and you need something you know new that's going to help you answer the question. It's it's that process.

 **Todd Helmus** 18:23  
In what?  
Walk me through that process a little bit.  
So explain more about the complexity of that.

 **Lynn Karoly** 18:38  
So I'll give an example part of a team that we're collecting data from.  
Preschool teachers in public schools.  
So there's no current nationally representative data that collects information about those particular individuals.  
And so we had to find a way first to identify A-frame.  
Who would you randomly sample from?  
Who do you know?  
How do you know who are the preschool teachers in public schools?  
Tools that you want to possibly sample to do a survey.  
So there's building the frame.  
There's building a survey data collection instrument which I think somebody mentioned testing it on a on a sample population.  
So we do some cognitive testing of that instrument before we would ever field it.  
Nowadays, most of the data collection is done by online surveys.  
So you have to program the survey, test that.  
And then finally implement. You know the the survey.  
So you're sending out invitations to participate.  
People decide to take the survey or not and you get answers back, so it's can be quite an involved process depending at each of those stages. You know how readily available, say, A-frame is. Whether you're using an existing survey and just modifying it, or starting from SCR.  
So on and so forth, and then again depending.  
We're doing a data collection now of similar staff in the military.  
Childcare system and we're having to go through review by OMB to get a clearance that's required by the government. And just to get our survey and other instruments to the OMB for their review is taken over a year and then it might be with them for their review.  
An approval for another 12 months.  
So that is an example of a very long timeline to to collect new data.

 **Todd Helmus** 20:34  
And as I'm thinking through mean developing these surveys, some some surveys can be quite long, and I imagine that the challenges come as multiplied by the number of questions that you're asking.

 **Lynn Karoly** 20:46  
Right, right.  
And we try to balance the burden on respondents, how much it's gonna take them to take a survey with the amount of information you know, we're trying to gather so often, you'll start with a longer instrument and it gets pared down because you have a goal we only.  
Want the survey to take an average of 20 minutes? Or, you know, whatever the the target is.  
So yes, there's a process of deciding, prioritizing, you know what?

 **Todd Helmus** 21:08  
Yeah.

 **Lynn Karoly** 21:11  
What questions you want to ask?

 **Todd Helmus** 21:13  
And how long?  
I'm just curious, you know, if you if you have a project and like think through a standard project or recent project that you've had to do this on like how much time is being allocated to this either in weeks or months or labor hours?

 **Lynn Karoly** 21:17  
Mm hmm.  
Well, the example I first gave, we've been able to do that pretty quickly with a public school teachers.  
And drew on other surveys that you know, we build from this example of the military child care system.  
And as I mentioned, it's going to be probably three years from when the project started to when we're actually sending out surveys and that's not full time work because some of it is handing it off to a government agency for them to do their review while we sit.

 **Todd Helmus** 21:59  
Yeah.

 **Lynn Karoly** 22:00  
And total our thumbs but.  
It's a big investment, definitely a big investment.

 **Todd Helmus** 22:05  
Catherine, thank you.  
Lynn.

 **Katherine Watkins** 22:10  
So I would completely agree with Lynn and what I think is would be really I think of it as project management and I think of it as figuring out what are the critical paths right. And if somebody could help me like take a project and say here are.  
All the things that need to happen in terms of IRB review, you know, first you got to do this, then you got to do this, then you got to do this, then you've got to do this.  
And help identify the critical paths so that you're always working.  
The most efficiently.  
That would be incredibly helpful.  
Because what if you make a mistake on one of those critical paths? You end up like wasting time, right? For example.  
You know you need OMB review, right?  
And that takes a really long time.  
So get that done as quickly as possible, even if you haven't yet figured out some other things, right?  
And then while the OMB review is happening, you can do those other things.  
So most of my projects are five years, six years.  
They're long, and so if you, if you can shorten that time, that's great like.  
And they involve multiple inputs from different areas, right?  
So it's not just coordinating 1 throughput, it's coordinating multiple throughput.  
So say you're working with multiple healthcare systems and each healthcare system needs to do an IRB review.  
Right, or needs to do something like that, then sort of again thinking about how the different pieces interact.  
To me, I think that's called project management.  
It's a lot of what I do.  
Even though I'm not a project manager and it would be really helpful to have like to get some help with that because it takes a lot of. To me it takes a lot of time.

 **Todd Helmus** 24:03  
And what type of when you think about getting help with that? Like what?  
Like getting a sense of what the timelines are or what the long pulls and the tent on those timelines are or what, what what like what?

 **Katherine Watkins** 24:14  
Most of these projects have the same input like they all have to go through IRB review, right?  
And they all have to like Lyn said.  
You all have to think about what is your sample and how are you gonna identify it and how are you going to.  
There's some common steps in every single one.  
And if you could, I don't know.  
But if you could somehow figure out how to.  
I'm not sure, Lynn.  
Maybe you can help me.  
But.

 **Lynn Karoly** 24:50  
Well, I guess the one thing to mention is I think most of us operate in the world of the Gantt chart and I don't know if people know what that is, but it's basically the rows are all the tasks and then, you know, you've got which months or.  
You know which time periods are active and you try to look and figure out which things depend on what and and the sequencing. And that's kind of an old fashioned way of doing it and maybe there are ways that especially with common things like a survey project where.  
You know they're going to have.  
Certain elements and how much time you know, you could do that more efficiently, or even figure out a better way to have all those steps happen. Then the way we kind of visually see it when we look at one of those, those charts, I don't know if that.  
Helpful.

 **Katherine Watkins** 25:37  
That's exactly what I mean.

 **Lynn Karoly** 25:38  
Yeah.

 **Katherine Watkins** 25:39  
Yeah, especially when it's a complicated Gantt chart, right?

 **Todd Helmus** 25:39  
Hmm.  
That's that's really interesting.

 **Lynn Karoly** 25:44  
Yeah.

 **Todd Helmus** 25:47  
We'll. We'll come back then thinking about like some AI solutions for any of this. To the extent that we have any, we we don't have to have them.  
But I'm curious like, what else on qualitative side?  
Do you see as as sort of challenging aspects and you know across all of these types of studies that we're talking about?

 **Katherine Watkins** 26:12  
I mean, couldn't the AI?  
Oh, sorry, I don't know 'cause. I don't actually. I consume the research rather than doing the qualitative research, but it seems to me if you could have AI go through the interviews as the first step and help you kind of pick out themes and help you, I think.  
That would be great.

 **Todd Helmus** 26:30  
I mean the completed interviews or the the developing the questions.

 **Katherine Watkins** 26:34  
No, no, no.  
The completed interviews I think that developing the questions needs more thought.  
I'm not sure AI could do that.  
Maybe it could, but to me, as like we're the subject matter experts and sort of and really being able to think about what is it because it's not. I've had certainly had occasions where.  
We have gone through a set of interviews and then afterwards realized we didn't ask such and such.  
Which we I wish we had thought to ask, blah blah blah.  
I'm not sure that AI could have helped us with that.  
To me, that's a thinking process.

 **Todd Helmus** 27:11  
Mm hmm.

 **Katherine Watkins** 27:12  
But in terms of the being able to analyse the data and to and to pull out themes.  
That seems very straightforward and something that AI could.

 **Todd Helmus** 27:21  
And it's a time consuming task as well, right?  
I mean, especially if you have a lot of interviews.

 **Katherine Watkins** 27:24  
Yeah.  
Yeah, that seems like a no brainer.

 **Todd Helmus** 27:29  
Yeah, Lynn. And then Emily.

 **Lynn Karoly** 27:33  
Yeah, I was gonna give you an example where we're actually trying to give something like AI right now, which is we're doing a quantitative work.  
It'll be eventually regression based analysis.  
But we want to characterize different states in terms of the policies they had in place at a given point in time and across all 50 states. We have planned documents where they document what they're going to do in terms of their policies.  
Their narrative descriptions.  
Sometimes they're in PDFs.  
They may be scanned if we go back far enough in time, so we want to come up with a rubric for what?  
How we're going to characterize those policies and then have the machine go through and extract the relevant text statements or, you know, other information.  
Maybe it's data from tables so that we can then create these policy variables that go into.  
Models. So it's kind of like taking qualitative information about state policy environment, codifying it, but do it in a systematic way that doesn't require person time to read through 50 plans across 20 years. So.

 **Todd Helmus** 28:50  
That's a that's a very that's a very concrete example.  
Thank you, Lynn.  
You had your hand up or Emily.

 **Lynn Karoly** 28:56  
Oh, no, sorry. That was just me.

 **Todd Helmus** 28:56  
I mean, Emily.  
No, Emily. Yeah, you.

 **Emily Lathrop** 29:00  
Yes. So in thinking about interviewing one of the most one of the challenging parts that I've run into is like finding the right stakeholders.  
So if we're talking about, maybe we're asking a question within the DoD like there's a complicated web of stakeholders and finding the exact right people to interview is often difficult and often also relies very heavily on existing networks of Rand researchers, right?  
So do you have the right people on your project who know the right people to get you the right contacts?  
Within whatever organization you're working in within cod to, you know, find the people to interview.

 **Todd Helmus** 29:37  
Listening.

 **Emily Lathrop** 29:37  
Who are actually kind of involved in answering questions, and often this is these are.  
Kind of the people who.  
The stakeholders who would be involved that you need to interview are not people whose who's in their job description to be working on these problems necessarily.  
So it's not something you could just like look up, right?  
It's people who are kind of.

 **Todd Helmus** 29:54  
Especially these excessively bureaucratic institutions, where there's so many levels of personnel involved in in the in the processes.

 **Emily Lathrop** 30:00  
Mm hmm.  
Yeah. And you and you often want to talk to people at multiple levels, too, so making sure that you are kind of gathering the the right people.  
Is kind of difficult process.

 **Todd Helmus** 30:13  
Interesting. That's a great.  
That's a great I love that example.  
Alright, alright, this is this is super helpful.  
So we've covered on the on the qualitative side, we've covered like thinking through what questions we want to ask thinking through who we want to ask these questions to.  
Thinking through the the Gantt chart, as it were of trying to figure out what what all these processes and these projects I need to complete at what time frames to make this project most efficiently run, and I think analyzing the the the qualitative data and doing the C.  
Anything else that those are a lot of those ideas I hadn't thought about before. In my view, like I was thinking, well, the coding's probably the biggest thing, but you're all identifying.  
Some novel areas.  
Anything else on the qualitative side that we haven't thought through?  
All right, so if if not, then let's let's I'm curious about for the quantitative folks in this, Christina.

 **Khrystyna Holynska** 31:15  
Yeah, just a very, very small thing to add, especially when you have a very large data set of text data and start working with it.  
Move it. Moving it into the final product wherever it is.  
Slide deck or a report. I found AI very helpful in tracking in tracing it back to the interview. So when you have a very good quote, you usually remember where it is, but when it's.  
Something that is not as like eye-catching, but very important to include.  
It's kind of helpful in organizing the notes in a way that it's very, very easy.  
To trace back to the interview to the specific moment of a point in your data set that you can easily recite and create these citations for you.

 **Todd Helmus** 32:06  
Is is this another?  
Is this sort of another approach to doing the qualitative coding?  
Are you talking about something different than qualitative coding?

 **Khrystyna Holynska** 32:14  
It's qualitative coding, but like adding a layer so that AI remembers, remembers and gives you an output which traces back to the original interviews. I've done it multiple times and it's helpful because I tend to, as I go calm through the data, tend to not always remember who.  
Said this specific thing that I want all of a sudden I want to cite later in the writing process.

 **Todd Helmus** 32:41  
Interesting. Fascinating. All right, awesome.  
That great idea.  
All right, let's maybe shift on the on the quantitative side.  
For those engaged on the on the on the quant angle, I'm I'm curious we we did an analysis.  
We looked at.  
We used large language models to sort through ran reports for the last six years.  
We asked what were the most common methods.  
I think the top three were literature reviews, statistical methods.  
And interviews.  
You know, statistical methods is a pretty broad category.  
Is it for those who do like quantitative stuff?  
Is it possible to identify what quantitative methods are most frequently used at Rand?  
Or it's just such a hodgepodge, you know, based on whatever the question is and it varies completely from project to project, what what methods, statistical procedures you're using on these projects?

 **Lynn Karoly** 33:40  
Yeah, I'll just chime in. I I think it's very varied and very context specific.  
You know what?  
The research question is what data you have and so on.  
There might be.  
You know, probably what's more common is like the package that you're using, the software statistical software package. And you know that's a more narrow set. Any given package can do hundreds of different, you know, applications and methods.

 **Todd Helmus** 34:00  
Mm hmm.  
Like R or state of that kind of thing.

 **Lynn Karoly** 34:09  
Yeah.  
Exactly. And so I just think to say that you know, we're to try to come up with a bar chart of which specific method and often you're using multiple methods.  
You know I'm trying it.  
You know method A and method B and see if results are robust and.  
So sensitivity analysis mean that you know you're kind of multiplying.  
So I I think you know there it may be easier to talk about.  
I'm just doing something descriptive.  
Serve. I might be doing something.  
That's causal where it's an experimental situation. It may be a quasi experimental design, but I'm still looking for causal estimation.  
You know, maybe those kind of broad categories than it is that I use, you know a particular method.  
For estimation.

 **Todd Helmus** 35:01  
Brian, I saw your hand up and then we'll go to Kathryn.

 **Bryan Frederick** 35:05  
Yeah, I like Lin's categories.  
I wonder too if.  
Maybe there's a useful distinction around the what sort of life cycle of the data part of it?  
So there's the data collection piece, there's data cleaning, whatever you have it piece and there's the data analysis piece and you know in addition to the ways that Lynn sliced it, maybe those are different aspects that are sort of common across those that still you could think about.  
Different ways to get after the different parts of that I could see. Certainly AI having different types of applications.  
Or utility to to different parts of that process.

 **Todd Helmus** 35:38  
Mm hmm.  
Interesting. And we'll and we'll come back to.  
I'll also ask that question again in, in a in a second. So we'll see if others have ideas on that, but Catherine?

 **Katherine Watkins** 35:50  
Yeah, I think that what you could.  
I think that the data I think almost every project has to do descriptive right, provide sort of what is the description of the data.  
So that's a common thing across any project.  
I think they all have to deal with missing data and how are you gonna address missing or lost a follow up data.  
Those are things that I think could be automated in some way.  
I also I just had an idea, what if you could?  
Put the survey into AI and then say create all the variable names for me, right?  
Like right now, a programmer goes in and goes to the survey and says, OK, this question has this many response items and here's the like they have to create all that. That seems like if you could take the survey just like spit out, here's all the variables here.

 **Todd Helmus** 36:26  
Hmm.

 **Katherine Watkins** 36:44  
All the names.  
Here's the data dictionary, essentially, and then here's all the descriptives.  
Spray you know, and if you've got too, if it's experimental, you got Group A, Group B.  
So you know and then here are the missing date.  
Here's what missing data there is.  
That all seems that's it.  
Way before you even get to analysis where I do think it's more specific, but I think almost every any quantitative project has to go through that initial those initial steps.

 **Todd Helmus** 37:14  
Yeah, yeah, for sure.

 **Katherine Watkins** 37:16  
And that could be that could be a really interesting way of automating.  
Umm.

 **Todd Helmus** 37:24  
Lynn Lynn Lynn.

 **Lynn Karoly** 37:31  
I think that's a really interesting idea for thinking about how data could be, you know, managed and and processed as you get to the analytic point.  
I want to just point that there's a potential issue here if we think about AI as allowing us to do maybe more than like instead of running 10 versions of a model, I can just let it go and it's going to run 100 version to the model.  
Right. Or it's going to search for the best fit on a particular statistical model.

 **Todd Helmus** 38:01  
Mm hmm.

 **Lynn Karoly** 38:07  
One of the things researchers are increasingly concerned about is data mining, which is going into a data set and just, you know, looking at all these different options.

 **Todd Helmus** 38:18  
That's a right running 100 running 100 analysis to see which one is that, David, that's.

 **Lynn Karoly** 38:22  
Yeah, yeah. And see which one's the best right. And. And so increasingly, we're guarding against that in some cases by pre filing, you know, an analytic plans that say this is how we are going to use the data. And then when we go to publish, we say.  
You know, I didn't go beyond what I planned to look at.  
I wasn't trying just to mine the data other ways in which we have to correct our standard errors for the.  
Multiple hypothesis testing.  
You know, just a recognition that it's this.  
Is not always more looking at data you know as something that you might think that AI would be helpful with 'cause it can do it.  
So cheaply, you know, just set it to run.  
So I I think it's just something to guard against in in this area and maybe more generally as we think about how AI might help us with our methods is could it go kinda too far?  
In ways that make people distrustful of of the results.

 **Todd Helmus** 39:23  
No, that's that's that's really helpful. And I know one of the questions I wanna ask you about was was was risks, Carolyn?

 **Caroline Johnston** 39:31  
Yeah, kind of off of Lynn's point.  
I'm not sure if people use AI in that sense, but I would hope that kind of any quant researcher right is familiar with the concept of overfitting.  
And I guess this speaks to the risk.  
Is that like people who maybe are not familiar with these ideas, right? Are trying to explore AI in this way.  
But yeah, I think right now we have, you know, kind of the older AI tools to, you know, search this space of, you know, possible parameters and models.  
And all that good stuff.  
But yeah, maybe this is like there needs to be more education about this idea of of overfitting outside of the the typical people that are using AI right now, or like the people that are using it in their day-to-day.

 **Todd Helmus** 40:12  
I mean I I I mean, I imagine it's tempting.  
I mean overfitting is is a is an, is a, is is like. Seems like a bigger issue when other people do it. Then when then then when when I do it.

 **Caroline Johnston** 40:28  
Maybe I hope not. Yeah.

 **Todd Helmus** 40:31  
So it's, you know, you don't want the field to do it, but you know it's nice if you can find like the the Whiz Bang results that you're looking for and and get credit for that.  
So any other applications as maybe thinking more broadly, we talked about qualitative.  
We've had some really good ideas about.  
Maybe some opportunities on the qualitative quantitative side.  
Any other things we haven't talked about where you just think from from the work that you do?  
Methods wise.  
Your work portfolio, your battle rhythm, as it were, where AI automation could be helpful. Carolyn.

 **Caroline Johnston** 41:13  
I write a lot of code so the the quant code right we talked about call coding.  
AI has been really helpful with writing like any type of code I write primarily in Python, and I mentioned right? I'm a new hire, so I joined a project, you know, trying to make a good first impression here at Rand. And they're like, oh, Caroline, you know, P.  
Like can you do this?  
And I had no idea how to do this, but I was like, well, I know how to read Python code.  
I don't know how to, you know, write this from scratch, necessarily.  
But you know, I used to get me a good start, you know, kind of figure out how to write it.

 **Todd Helmus** 41:45  
Hmm.

 **Caroline Johnston** 41:47  
And then there's all these jokes about people becoming like it's called a 10X developer when they use large language models to write code.  
So it just helped me write code like so much faster. And of course checking that it's correct as well, which sometimes is not always done when people use llm's for example.  
But yeah, I think for me just when writing.  
Computer code, it just helps me do so much more.  
More and so much faster, which has been super super helpful.

 **Todd Helmus** 42:16  
And the coding is a is a common process in statistical methods, right?  
I mean, if you're using R or state of the, there's a code you have to write to be able to run whatever program you're running.

 **Caroline Johnston** 42:25  
Definitely.

 **Todd Helmus** 42:26  
Most of the time I think right.  
So that seems to be something that could be applied broadly.

 **Caroline Johnston** 42:28  
Yes.

 **Todd Helmus** 42:36  
Shane, I'll get to you in a second, Christina.  
And then Catherine, sorry, Christine and Kathleen.

 **Khrystyna Holynska** 42:42  
Well, I think Catherine was first. So just let her go and then.

 **Todd Helmus** 42:46  
OK, Katherine.

 **Katherine Watkins** 42:48  
It's a really silly example, but meeting minutes like just having AI transcribed the meeting minutes put it in like here are the key decisions. Here are the action items.  
Like right now I have an RA do that right.  
That's if I've been experimenting with having a recording the meeting and having AI do it.  
But again, I think that's a very simple use case scenario.

 **Todd Helmus** 43:13  
What do you do?  
How do you?  
How do you have it do the minutes?  
I mean, so I know you can have AI record it and transcribe it, but what?  
Is there another step that you add to that?

 **Katherine Watkins** 43:21  
Yeah, I do.  
I pull out key decisions like I want to highlight.  
We made a decision X, so it's not buried somewhere in the Minutes. And then I also want to hide.

 **Todd Helmus** 43:30  
Can you ask AI to find that find key decisions?

 **Katherine Watkins** 43:32  
No, I at this point I do not.  
But if it could, that would be great.  
And the other thing I would want to ask it that I don't currently do is what are the action items?  
Like who needs to do what?  
So that up at the top of the Minutes it says, you know, Jane is going to talk to so and so and get such and such. This person is going to do blah blah blah.  
And so at the next meeting, we got our action items and we can check them off and go like, OK, has this been done this been done this been done?

 **Todd Helmus** 44:02  
And you can have them done quickly, right?  
So you wouldn't be waiting 2-3 hours after the meeting.  
In theory, it would put tee something up for you to quickly review and and and approve.

 **Katherine Watkins** 44:12  
Right. And make sure that it's right that everybody knows what they're doing 'cause. That's a lot of the time is making sure that everybody knows what they're doing and that they don't forget that they have this piece of work to do.

 **Todd Helmus** 44:25  
Brian, thank you.

 **Bryan Frederick** 44:28  
Yeah, this is gonna sound like I'm passing the buck a little bit, but I just bear with me.  
The post process.  
If there were a way to more fully automate that process of the editing, the proofreading everything else were, you know.  
Dramatically more rapid than they are right now. I I think that right that would feedback I think into literally how I conceptualized the opportunities for research projects.

 **Todd Helmus** 44:49  
So it didn't take four months.

 **Bryan Frederick** 45:00  
Products rather and the types of decisions that I might try to inform because it would transform the potential time horizons for that and I think would probably as a result reshape the types of things that I would try to do.  
Whereas if you already know that you have to wait four months to get something out, there is really no purpose to trying to like, you know, get too rapidly evolving a target.  
So you're just gonna focus on?  
Longer term or different types of you know things and I can see that having actually sort of a transformative effect.  
Done. How we approach you know, research scoping and you know research design questions. If that then became sort of more of an option for us to have something out there quickly.

 **Todd Helmus** 45:41  
If you knew you could get this out in time to achieve.  
A policy impact quickly. It could impact you know how you even conduct a study and meet your own timelines.  
Rather just well, I'll get done 12 months 'cause. It can take them six months anyway, to to do the to do the tail end of it, Christina. And then Lynn.

 **Khrystyna Holynska** 46:03  
So to answer your question, if I understand correctly what other applications other first I work with a lot of foreign language literature and AI helps a lot.  
It's much better than Google Translate, for example, and it's kind of feels safer because it's in house I can.  
It saves a lot of time than I would go and translate, even if it's just a quote that I want to cite.  
Summaries I found AI super helpful and that's probably was one of the.  
1st.  
Objectives of first use cases to summarize stuff, and it's been super helpful saving a lot of time. When I ask AI to summarize, even if again.  
It's a different type of article on use or academic it it does a very good job.  
Citations as I mentioned, and to build on what Caroline said.  
Not just code and not just.  
In the code, because that's something I tend to do a lot, I tend to skip a comma or skip.  
Don't close the parenthesis. I just can copy all over in and tell it.  
Please find where my syntax is wrong, but also ask in which tool is the best and I've done it a lot.  
Which is it?  
R is it Python? Should I?  
Can I do it directly in in my computer?  
Convert something into something else and then I is usually really helpful.  
And yes, you can do it in Python.  
This is the best way.  
I just suggested to my own ways and one trick that I learned, let's not me.  
So I want to give a credit when it's due from Dave Byoke is to ask AI to write it all its own prompt.  
That's the best way to actually for me.  
I found it very useful to then ask AI to do something first.  
I I'm telling I want to ask.  
AI to do this and this for me.  
How would you ask AI?  
To do it and then it writes its own prompt, which is much more understandable for for AI to run it so.

 **Todd Helmus** 48:01  
Huh.

 **Khrystyna Holynska** 48:10  
But again, it's not something I came up with, but I think it's a brilliant idea.  
Thank you.

 **Todd Helmus** 48:14  
Interesting, Lynn.  
And then and then I want to ask a final question about adoption at Rand.  
Like, what would you like to see to help improve your understanding of how to use AI and or improve overall adoption of it in a safe and in a safe and effective manner. But Lynn, go ahead.

 **Lynn Karoly** 48:33  
Oh, I was just thinking about with the primary data collection and you know the cost costliness of doing so. Sometimes our surveys, you know we can do online and and it's the person's time, but often we also are doing interviewer assisted surveys where we have somebody on.  
The phone talking to the respondent.  
And sometimes you do that because.  
It may be more complex ideas and you can structure and you know a closed form.  
Question. So I'm wondering, you know, do we can we get to a point someday where that kind of data collection is done by machine rather than humans?  
And maybe there's some of that happening today.

 **Todd Helmus** 49:16  
I mean, the machine goes out and does the interviews.

 **Lynn Karoly** 49:18  
Yeah, basically dials the you know who the selected respondent is and then goes through the whole protocol for for the data collection.  
I mean, I can imagine and maybe this is happening now, but you know you'd want to avoid sounding like a machine.  
Want it to sound like it's a human and somebody who's able to respond when somebody says I don't know.  
And now I need to follow some other pathway to try to elicit the response or need to clarify a particular concept or term.  
So it's it's not just a matter of reading, you know, kind of a closed form survey and whether or not that would make respondents if it would, you have to disclose that.  
Is it something they'd feel comfortable with?  
More or less comfortable with.  
You know what does that future look like?  
Because again, what we're largely talking about are ways that we save people time or human time and substitute it for machine time.  
And so is that an area that, you know, Rand, we do a lot of data collection. You know a lot of it's just online surveys, but we do a fair amount that's also you know real time with with person interviews.  
I mean, I'd be interested in what, Katherine, Thanksgiving, the kinds of subjects that she works with that are clearly very.  
And I know a lot of work goes into how you collect data in a way that you're going to list it, you know, good, good responses.  
So that that may be very far off, but I think if brand you know, since we're in the data collection business, you know kind of we're thinking about what could that look like and maybe even pioneering some of that work.

 **Todd Helmus** 50:52  
Yeah, I imagine you could also ask AI to take the survey for you.  
You could develop models of populations that could.

 **Lynn Karoly** 50:59  
I don't know about that, yeah.

 **Todd Helmus** 51:01  
Take the survey for you.  
I know ran started to do some work in in that area.  
So OK last.  
My last question is we got a few minutes left. So two questions and you you can ask answer either one or the other, or or neither given the time that we have.  
But like what?  
What can we do? Stick with this.  
What can Rand do to help improve safe and efficient adoption of these technologies to enhance educational learning about how to use them?  
Do you think Rand is sufficiently adopting this stuff?  
Is it behind the curve and if so, what could make it above the curve Carolyn?

 **Caroline Johnston** 51:45  
So I've used ranch at a few times and it just hasn't been as good as just using Chachi PT.  
I don't know if this is others experiences as well, but like ideally you know I have like I write a lot of code I mentioned I would just copy you know, all of my code and put it into a large language model and say hey, this is the.  
Problem I'm having help me fix it but I'm not gonna do that if it has sensitive data right?  
And ChatGPT so.  
I wanna give all of my code all of the sensitive stuff.  
And I can do that with ranchat.  
From what I understand, I mean there's details, but it's not gonna help me fix it.  
So then I like, OK, I'm gonna go to the better product which is chat CPT and give it just chunks of my code, right?  
Leave out the sensitive stuff, of course, but it's gonna take me much longer to, you know, find out what my issue was.  
So this kind of I don't know this there's this my sense of this kind of quality issue with ranch at specifically about helping me move as fast as maybe I should be when compared to.  
The.  
Like go chat you with you for instance.

 **Todd Helmus** 52:48  
Other models that are out there, yeah, Brian.

 **Caroline Johnston** 52:50  
Yep. Yeah. Thank you.

 **Bryan Frederick** 52:53  
Yeah, it's second.  
The sort of widespread concerns about the quality of ramchat relative to other options, but in sort of add to that the.  
The unavailability of those things on classified networks.  
So if you work on classified stuff for this whole part of your thing, this whole world doesn't really exist right now, because you can't do any of that.  
So you have to sort of think about your lifecycle in that regard, but the most near term thing I think would be helpful, honestly.  
It would be for folks to have sort of illustrated use case guides for, OK.  
Let's say you wanna use large language models to do X.  
Here's some literal examples of how this is used and how this fit into an actual project lifecycle and turned into an actual product that was published and you know, whatever else walking people through in an illustrated manner.  
The the specific ways in which people have successfully.  
Used it how they dealt with pitfalls that came across.  
Especially hallucinations. I know a lot of researchers are pretty freaked out about.  
You know, given the sort of reputational risks involved in that kind of thing.  
And sort of what best practices are, but in a much more concrete, you know, illustrated manner to to walk through, feel through that. I think that'd be incredibly valuable to increasing adoption, which at least in my world, I think adoption's pretty low right now for, for.  
A variety of.

 **Todd Helmus** 54:17  
Yeah, that would have saved me about four hours on Friday afternoon. I think 'cause, I was trying a a new tool that ran has. It's probably a pretty good tool, but there's also not a lot of support that goes into it, Catherine.

 **Katherine Watkins** 54:29  
I was going to say exactly the same thing. I started using it for literature reviews. After I went to a seminar that somebody did on using ranchat for literature reviews and was like OK.  
So having use case scenarios specific use case scenarios would be very helpful and I would start simple like I would start with the easier stuff rather than the more complicated stuff.

 **Todd Helmus** 54:55  
Thank you.  
That's that's helpful. Any other?  
We had two minutes left.  
Any other thoughts, observations.

 **Lynn Karoly** 55:03  
I'll just quickly. Oh, I was gonna say one other place to think about.

 **Todd Helmus** 55:04  
Alibis.

 **Lynn Karoly** 55:09  
And again, this may already be underway is working with our hspc, the IRB Institutional Review Board, since I'm assuming most all these projects, especially if they involve real people, we'll have to have some type of clearance.  
And again, being kind of ahead of the curve in how these tools might be used and what the implications are.  
For consent or the kind of information that you collect and and retain, and and so on and so forth, just because I think you know very quickly we could kind of overwhelm the expertise that we have on our current committee and.  
So in parallel with, as these methods are being developed and used, you know being sure that we're prepared on the human side for what we need to have in place.  
To to make it work and protect the subjects that of our research.

 **Todd Helmus** 56:12  
Awesome. Well 759.  
Thank you everybody.  
I put the ptn in the comments, so please charge your time to that that account.  
And you know, again, if you have any questions, please reach out.  
I think I don't know how public our product is gonna be.  
I would hope that it be shareable within ran. We'll be doing a briefing and then a report.  
Report won't be publicly released, but hopefully it'll be shared within Rand.  
But that's not up to me at this point.  
So thank you all for taking time.  
Really appreciate your insights and this is really helpful for us.

 **Caroline Johnston** 56:52  
Thank you.

 **Bryan Frederick** 56:53  
Son.

 **Shannon Walsh** 56:53  
If it change.

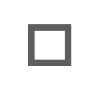
 **Lynn Karoly** 56:54  
Thanks.

 **Brian Mills** 56:54  
Thank you.  
Cool. I think that went well.

 **Todd Helmus** 57:03  
I.  
I wasn't sure. Hang on.

 **Brian Mills** 57:06  
Oh yeah, let me get I'll get the recording, OK.

 **Todd Helmus** 57:06  
Yes, it was really helpful.  
Let's I'll I'll give you a call back.

 **Brian Mills** stopped transcription