CONTENT STRATEGY / INSIGHTS REPORT

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GENERAL INTRODUCTION

EduDao is a crowdfunding platform for educators. It aims to help teachers develop projects for classrooms, schools, communities, and non-profits.

Our team took on the project of developing the platform's *proposal submission* experience. The proposal submission is the first step educators would take if they are interested in starting a crowdfunding campaign with eduDao.

The following report was issued to the client after conducting a round of user testing of lo-fidelity prototypes of the proposal submission experience. We tested three different prototypes with five users. Four of them fit the target user profile of the platform; the fifth was a board member who would be reviwing the proposals submitted through this application form. The three prototypes were designed to test for the following:

- in what order should information about the project be collected?
- Is the language being used to ask for specific information clear?
- how do different layout densities impact users' engagement and comprehension of what's being asked?

To test these parameters, we gave users the low-fidelity prototypes (non-clickable) and asked them to talk us through and reflect on their experience as if they were actually filling out the forms. Using video screensharing, we recorded users' responses as they were making their way through the form.

With this raw data, we went on to catalog and categorize all responses as they pertained to our intial questions as well as to any other unforseen issues. With this data processed in this way, we were able to synthesize insights and recommendations which are presented below.

USER TESTING RESPONSES:

Below is a selection of quotes collected from users during testing. These quotes give light to the rest of the recommendations provided in this report.

> "There is too much information here. Too much work. I would only do this if I knew I was getting the money."
>
> "Daunting"
>
> "The way it comes across is asking for too much stuff"
>
> "You can really tell the difference between the type of organization based on the way the form looks. Newer more exciting organizations have forms more like the [natural language form]. I would prefer to have more interaction."
>
> "I like going through different pages"
>
> "Give bigger picture first, then get into the details."
>
> "I definitely like the one that was broken up into different pages. Gives me the feeling that I can say more and add more to the proposal than the one page."
>
> [positive response to text boxes] "Better to overshare than under share!"

CONTENT PRIORITY MODEL

One of the main questions going into this round of testing was about the sequence of information collection. Do we start with standard vitals (name, address, etc.)? or do we attempt to get users more invested in the proposal by starting with something more germane (e.g. the goal of the project)? In other words, the questions of sequence must be balanced with the question of importance (i.e. presentation order vs. priority order). For example, while users might expect to fill out their name and address first, this bit of information is ultimately much less important than the goals and intended impact.

Since the success of the form depends on adequately balancing presentation and priority, based on user testing as well as on prior interviews, we have developed the following content priority model. Using this model as a high level guide, will help us to better structure the form and to more clearly convey to the user which pieces of information are most crucial.

1.
For all of the users we tested, the most imporant part of the proposal was the students who will benefit from the crowdfunding campaign, i.e. the direct **beneficiaries** of the project. *These are the stars of the proposal.* Educators, whether in public schools or non-profits feel strongly that such projects are for exclusive benefit of the students. The proposal submission experience should make this priority clear whenever possible. In asking for information about the students the form should give plenty of opportunity for users give a realistic picture of their students and a compelling case for their need.

2.
Beyond that, what's important to board members reviewing the proposal is the **impact of the** project: how will it affect the students in the immediate *and* long terms. Both sides of impact should be addressed and all users surveyed expressed high degrees of comfort being able to articulate these two levels of impact.

3.
After the scope of impact, the **material** means through which this impact will be achieved must come into play. This priority order might seem counterintuitive: it's more logical to think "I need X materials in order to achieve Y goals," but this is again an example of the tension between presentation and priority. While in the short narrative of the proposal it makes sense to bring up what's needed first, this section of the form must be treated with the understanding that the materials are only a stepping stone to a larger goal and not an end in themselves.

4.
Last is the **organization**. While putting the project into motion and demonstrating a track record, the main actor of the proposal is ultimately not its central figure. Interestingly, most users expected to submit this information first. Adhereing to this expectation, collection of information on the organization should be treated quickly and lightly in order to properly set up the main "who" and "why" of the proposal: the beneficiaries and the impact.

In short, the Content Priority Model can be summed with the following:

1. Beneficiary
2. Impact
3. Materials

4. Organization

GENERAL FINDINGS AND RECOMMENDATIONS

Based on the user research, below are several general guidelines for the development of the proposal form experience:

- Keep pages light - reduce density of layout whenever possible.
- Write-in blank fields are good and should not be feared. Educators are generally used to filling out forms and are not easily intimidated. Still, make these fields appear light and easy, with lots of space around. Use layout to create lightness on the page.
- Using examples of the kind of information the proposal is looking for, is often the most concise way of communicating what's needed.
- Ask for *just enough* of the right information. Making clear *how much* information you're looking for will be appreciated by users who are short on time (common for public school teachers).
- Remind users that this is only the proposal stage which is intended to give the board a quick overview of the project. Once the proposal is approved there will be more opportnity to provide additional information on a public campaign.
- In some cases, prototypes asked users for input via a choice among several buttons. But users often found buttons confusing and limiting. Use buttons only when options are few and finite and the required information is concrete. For open ended / important questions, use text fields.

NUMBER OF FORM PAGES

A question of considerable debate is whether online forms should be presented over several pages with content broken out or on one page with all the content laid out right away.

A survey of our users on our questionnaire shows **a slight preference for multiple pages**. For at least two users in particular, this implied the option of having more generous text fields and thus the ability to more clearly express themselves (this was especially true for when describing their students).

The fact that this form is actually asking for a lot of different kinds of information would also support this multi-page option. Laying out too long of a form risks intimidating the user right from the beginning. Find ways to present questions to users in small enough amounts, while still keeping them aware of where they are in the process.

EXPERIENCE FLOW ARC:

- The momentum of the proposal experience should be towards the beneficiaries first and then again towards the impact (as per the priorities set out above). Let these important sections spread out, while moving through others quickly.
- Get standard administrative information (like organization's address, contact name) out of the way right away, in order to get to the meat of the proposal: *how will someone in need experience positive change.*

INSIGHTS / FINDINGS BY CONTENT SECTION

Presented as recommendations based on positive and negative feedback from 4 users on 3 different prototypes.

WELCOME PAGE

- This section should include:
- A time estimate of the proposal submission experience
- A brief description of what kind of projects are ideal for the platform
- A quickly presented steps overview
- A list of "Information you'll need"
- Make clear what the purpose of the proposal is: i.e. to be reviewed by the board in order to post a campaign
- Contextually define terms like proposal, project, campaign etc. and stick to them.

NON-PROFIT CHECK

eduDAO has expressed that verifying the organization's Non-Profit status is a high-priority. Including this checkbox in our prototypes has prompted a lot of attention and confusion, which has lead to the following recommendations:

- Clarify that the platform is currently only accepting proposals from public schools and registered non-profits
- Mention that if the applying org is a NP, documentation about this will be collected later. A voiding a document uploading step at this point in the flow, will help get the user into the content section more quickly.

[START OF CONTENT BUILDING SECTION]

TITLE OF PROJECT

- Starting with this will help orient the user towards what this proposal is all about
- Make the prompt for this prominent, as well as its appearance.
- Give hints about its structure, length, and compelling nature
- Maintain consistent terminology between project/proposal etc.

USER PROFILE

- Keep this section light and fast in order to get to the more important section faster (beneficiary / impact)
- Users mostly found the "role" buttons in this section confusing. Our recommendation is to let them simply write in their role exactly as it is, rather than having to choose from possibly limiting options (i.e. "Founder")

PROJECT PHOTO

- Proposal is likely to only need one photo - options to upload should make this clear.
- Explain why the photo is needed to address teacher's concerns about their students privacy (e.g. "Choose a photo that accurately describes your project").
- Provide hints as to what would make a good profile photo

ORGANIZATION / SCHOOL INFO

- Make role of org/school in the project clear. Public school teachers can be suspicious of their school taking teachers' resources. Make it clear that the school is *not* the recipient of the project.
- This section might also be appropriate to follow up on the non-profit status documentation.
- DO ask for the mission statement (in precisely those words). NP's will have this on hand. Schools also have these. In the words of one of our testers:

  > "some teachers might not know the mission statement, but every school has one, and it's good to know it and they *should* know it."

  Mission statements are an efficient way for the board to get a sense of the organization.
- But do give the option to omit this, in case it is hard to come by, as might be the case in public schools.

**[THE NEXT SECTION IS ONE OF THE TOP PRIORITIES
SET IT UP WITH SOME KIND OF INTERSTITIAL MESSAGE]**

BENEFICIARY

- Users found buttons limiting when trying to describe the direct beneficiary. The form should not reduce the beneficiary to just a few types, but let the user describe them in a unique way, to make them sound special. Use a text field that gives the proposer room. Remember, the beneficiaries are the stars.
- Do not ask for the beneficiary's location, as this prompts privacy concerns. Additionally, this information would already have been collected in the org/school info.
- While it is important for the proposal to convey the scale of intenteded impact, be mindful of reducing the group of beneficiaries to a single number. Ask for this information in plain language (e.g. "Approximately how many students will be affected by this project").
- Let the proposer type this number in - it can vary widely - rather than picking one from what might be a very long drop-down.
- Ask about why the students are in need. What is their story? What makes them special? (Our research showed that this last question is effective at getting this kind of answer).

MATERIALS

- Make clear that the materials are for the direct benefit of the students and not for the organization or school. We have observed teachers get very suspicious about where exactly the resources might be going.
- Not many numbers regarding the materials are necessary at this point. Explain that we just need an estimate on quantities and prices for now. Once the proposal is approved the platform will ask for more details.
- Keep in mind that we want to get through this section fairly quickly in order to get to the more important section on IMPACT. Keep it light.
- Provding materials categories via buttons or drop-downs might help get through this section quicker.

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IMPACT

- Give proposers room to write. Several users expressed comfort and desire to lay this out fully. This section is very important.
- Make prompts clear about the kind of information on impact the proposal requires. Use appropriate language: is impact long or short term? Direct or indirect?
- Find a way to ask for the timeline of the project? (the "when" of their story)
- Provide many opportunities to upload additional documents and media. This section can be used as another possible opportunity to collect Non-Profit status documentation
- Make clear suggestions about exactly the kind of information that's needed

[END OF MAIN CONTENT BUILDING SECTION]

PREVIEW

- Make clear that this is the preview section. Even though it was titled in prototypes, some users did not realize they were looking at a preview of their submission, but thought it was a continuation of the form or perhaps a preview of what's to come.
- Make sure all the sections are referenced and titled identically to how they were in the main form.
- Explain the point of the page (to review before submitting to the board).
- Format minimally to reduce visual density and to signal to users that they are almost done.

CONCLUSION

Using the information provided in this research report, the project UI team should be able to confidently iterate on the prototypes. Keeping in mind the priority model should help in the design treatment of each section and on the transitions between them.

END OF REPORT