

# TSP.gov | Project brief

## Project vision

**Version 1** — Shown at the kickoff meeting:

We want to help federal employees and military personnel obtain an understanding of their retirement options in order to be excited about investing through the TSP.

**Version 2** — Revision based on FRTIB feedback:

In collaboration with federal agencies, we want to help federal employees, uniformed service members, and their beneficiaries obtain an understanding of their retirement options in order to be engaged in investing through the TSP so that they can retire with dignity.

## Background

TSP.gov empowers public servants to reach their retirement goals. It provides federal employees and uniformed service members educational information on the Thrift Savings Plan, a retirement savings and investment plan comparable to the private sector's 401(k) plans. Additionally, TSP.gov provides access to a personal account and retirement fund management tool for users to select their preferred retirement funds, monitor their investments, conduct online transactions, and update their beneficiaries. TSP.gov also provides payroll, personnel, and other agency or service officials instructions and guidance to support training of federal employees and uniformed service members while effectively implementing the provisions of law, regulations, and procedures relating to the TSP.

## What is the problem to be solved?

Based on previous user research conducted for FRTIB, there is a gap between how information is currently organized on TSP.gov and what users need from the site in order to make informed retirement decisions. FRTIB wants users to be able to easily find and understand the retirement services they offer, ensuring that users are taking full advantage of the retirement benefits being provided to them. Additionally, FRTIB believes that the site would reach more users if it was mobile-friendly.

FRTIB is working to launch a revised TSP.gov in 2018 and is seeking guidance on setting a direction to efficiently complete this work. We can help FRTIB by supporting efforts to modify the site's information architecture, content, and visual design in order to make it easier for

users to navigate, understand, and access information on the site using multiple types of devices. We will develop a roadmap that will provide a clear understanding of how to approach and organize this work. Our work can also increase the level of accessibility of TSP.gov, enabling the site to move towards 508 compliance for the benefit of the user community while ensuring compliance with federal regulations.

## Approach and goals

FRTIB has engaged 18F to help FRTIB's in-house team develop additional capabilities around user-centered design, research, content, and development, inclusive of agile project management. At its core, this work supports FRTIB's efforts to redesign TSP.gov in a user-centered way. Based on initial discussions, we believe that we can provide the most value by focusing on:

- Conducting user research to establish a shared understanding of who the users of TSP.gov are and what their needs are.
- Collaborating on identifying and articulating discrepancies between user needs and what TSP.gov currently offers within its existing information architecture.
- Identifying how to improve the TSP.gov user experience through use of the U.S. Web Design Standards.
- Identifying how to organize TSP.gov's content to align with the FRTIB's mission of empowering users with the right information in order to retire with dignity.
- Recommending (and implementing, to the degree that it's possible) changes to align the user experience of TSP.gov with the FRTIB's mission.
- Establishing a roadmap together that outlines how to implement recommended changes.
- Providing guidance as changes are implemented against the roadmap through this engagement's duration.
- Ensuring FRTIB's participation in team rituals, work planning, and decision-making in order to empower them with best practices to serve their users and mission beyond this engagement.

At the end of our work together, the in-house team at FRTIB will have developed additional skills and capabilities needed to successfully implement against a prioritized roadmap. Any features and recommendations should be developed and implemented by the in-house FRTIB team as they are best positioned to implement and iterate on the roadmap that we will collaboratively develop together.

We will conduct our work in two-week increments (sprints), which began with a kickoff workshop involving key stakeholders and the FRTIB team. Each sprint will generally focus on insights and key questions that came out of the research conducted in the previous sprint. For example, in Sprint 1 (lasting from 11/30-12/13), we are focusing on building a preliminary

roadmap, conducting additional stakeholder conversations, reviewing artifacts from FRTIB (for example, the content audit), establishing preliminary working practices, and developing our research plan while identifying the user groups that compose our initial research pool.

## Target users

TSP.gov has a diverse user community whose use of the site spans their term of employment with the federal government or uniformed service and possibly beyond. During our kickoff, we learned that the individuals who spend the most time using TSP.gov are new users. Due to these findings and the impending influx of a significant amount of new uniformed service member users in January 2018 via the Blended Retirement System (BRS), we recommend prioritizing our user research as follows:

- **Top priority:** New federal employees, including those who are less familiar with the Thrift Savings Plan and uniformed service members (specifically those enrolling in the Thrift Savings Plan beginning in January 2018)
- **Second priority:** Beneficiaries of Thrift Savings Plan enrollees and payroll, personnel, and other agency or services officials who provide training on the Thrift Savings Plan to federal employees and uniformed service members

## Challenges we may face

FRTIB aims to provide a vast array of information for all user types and TSP.gov interaction moments. Because TSP.gov's user interaction moments and the needs users have within each of these moments vary greatly throughout a user's lifetime, there is an abundance of information on TSP.gov. This can make it challenging for users to find the information necessary to meet their specific need.

While research has been conducted on TSP.gov with FRTIB employee users, user research has not been conducted with users outside of the agency. Establishing a momentum and practices to effectively identify, recruit, and interview non-FRTIB employees will be critical in gaining valuable input from people who are not as familiar with the TSP.

Additionally, as FRTIB staff are not licensed brokers or financial advisors, they are not permitted to provide personalized retirement guidance or drive individuals to select specific retirement funds. This means that there may be tension between what users want and what FRTIB can legally provide. There is a wide array of information that FRTIB is legally permitted to share with users that will enable us to ensure TSP.gov's content is inclusive of information that users find useful.

Finally, while this work is intended to support the redesign of TSP.gov, the existing scope of work is not intended to include an actual site redesign. We may need to remind team members and stakeholders of this as we move through our existing engagement.

## **Areas of focus (subject to change)**

In the subsequent approximately five sprints of this engagement, we will concentrate our efforts on the following areas of focus. In order to maximize the most value from our time together, we will select activities from these (or other high-value opportunities that arise as we move along) at the beginning of each sprint.

### **Learning from users (research and analysis)**

- Identify and recruit research subjects
- Conduct user research
- Teach a primer on user-centered design
- Discuss challenges and opportunities with additional stakeholders
- Create hypotheses intended to address challenges and opportunities
- Review current analytics program
- Review current survey program
- Conduct a journey map exercise
- Test hypotheses using prototypes

### **Content and information architecture**

- Audit existing content
- Test content with users
- Develop content style guide that addresses voice and tone
- Review and refine content governance plan
- Revise information architecture
- Develop glossary
- Refine content to meet user needs
- Audit printed materials, marketing materials, and communications

### **Leading teams (product and project management)**

- Establish and model Agile and Scrum practices (daily standups, sprint planning, sprint review, grooming, retrospectives)
- Model and conduct biweekly sprint review (demoing work of previous sprint to development team and stakeholders)
- Help clarify and communicate vision
- Develop a roadmap
- Develop a “macro-sprint” (quarter) plan
- Review and recommend project management tools

- Pair 18F team members with FRTIB team members so FRTIB can learn value of pairing

### Improving development practices

- Pair on implementing the U.S. Web Design Standards
- Develop best practices around accessibility using the U.S. Web Design Standards
- Develop relationship with CIO to help address concerns related to development process
- Develop quality assurance and testing process
- Develop delivery practices (Definition of Done)
- Measure how long it takes for code to get into production (and work to reduce that duration)
- Consider development and hosting environment for public side of TSP.gov

## Tools and techniques

### Prototypes

In the course of our research, we may create prototypes which are low-fidelity mockups of design concepts meant to test ideas. Prototypes are meant to be disposable; any code used is typically meant to be thrown away, though the learnings from them are injected into the roadmap and development cycle.

In building any prototypes during this engagement, we may use design patterns and styles from the [U.S. Web Design Standards](#), which will allow us to make accessible prototypes relatively rapidly.

### Style guidance

As part of our work, we'll aim to identify a consistent tone and voice that content on TSP.gov should carry. This information will be captured in a style guide either as an addition to an already existing guide or a new one to be developed. This style guide will be used in the development and governance of content for TSP.gov.

### Content types

TSP.gov currently relies on a variety of content types when providing information to users. Each of these content types will need to be considered alongside one another as we work to refine the style, voice, and information architecture of TSP.gov. This list may shift as our research uncovers new insights:

- About page
- Account instructions

- Withdrawal instructions
- Beneficiary instructions
- Retirement planning information
- Investment fund details
- Training reference tools
- Forms
- Interface writing
- Glossary
- External communications
- Bulletins and other important updates regarding the Thrift Savings Plan
- Contact information
- Privacy information

## Technical considerations

FRTIB has provided a publicly accessible AWS S3 bucket for storage of static files. This is an excellent shared resource for temporarily storing prototypes, however there are a few considerations that should be noted:

- S3 buckets do not directly support compiling code, so any U.S. Web Design Standards customizations will need to be compiled in a local development environment and configured with the proper tools prior to being uploaded.
- To allow for rapid iteration of prototypes, an automated deployment process should be established using a continuous deployment service, or using scripts in a local development environment. Automating this process will allow collaborators to avoid manually uploading files when they are changed and can eliminate the risk of files being accidentally deleted or overwritten.
- Having prototypes stored in a code repository such as GitHub will be critical in the development workflow, not only to allow for continuous deployment but also to allow for code to be worked on collaboratively. Establishing this workflow in the early weeks of this project will allow for future opportunities to integrate tools that will increase the accessibility, quality, and security of the underlying codebase.

## Metrics

Success will mean delivery of a roadmap, additional artifacts, and recommendations of next steps on how the FRTIB can move forward in their work with TSP.gov.

## Project milestones

Milestone or deliverable	Approximate date
Mid-point (50%) check-in	1/11/2018
75% check-in	2/1/2018
Delivery of final deliverables, including a roadmap for future work and other artifacts produced, possibly including: <ul style="list-style-type: none"> <li>- Mock-ups</li> <li>- Prototypes</li> <li>- Information architecture</li> <li>- Research artifacts</li> <li>- Design artifacts</li> </ul>	Week of 2/26/2018
Final presentation in person	Week of 2/26/2018

## Project team and roles

**Andrew Suprenant (Project Manager, 18F)** — Articulate vision for engagement in collaboration with the product owner. Regularly select work of highest value to be prioritized in sprints. Cultivate alignment of product owner, development team, and key stakeholders. Identify and work to resolve obstacles. Highlight and work to mitigate risk. Ensure progress moves forward and that the 18F team delivers.

**Anna Heller Sebok (Content designer/strategist, 18F)** — Evaluate existing content artifacts and tools. Collaborate with FRTIB content specialist on implementation of content strategy techniques and refinement of TSP.gov content. Assist with research recruitment, data collection, and analysis.

**Brian Hurst (Front end developer, 18F)** — Lead prototyping and development in collaboration with development team. Guide team through implementation of U.S. Web Design Standards.

**Donald Ferracci (Product Owner, FRTIB)** — Serve as single point of contact for FRTIB for purposes of decisions needed to move the engagement forward. Collaborate with the development team to create prototypes and implement the U.S. Web Design Standards on FRTIB's platform. Keep team and stakeholders informed, soliciting their feedback. Highlight and work to mitigate risks. Communicate feedback and help prioritize the team's effort. Assist with research recruitment, data collection, and analysis.

**Jamelle Thomas (Content specialist, FRTIB)** — Collaborate with 18F content designer on implementation of content strategy techniques and refinement of TSP.gov content. Assist with research recruitment, data collection, and analysis.

**Kathryn Connolly (Account Manager, 18F)** — Provide support to project team and serve as liaison between FRTIB and 18F.

**Lapedra Tolson (Multimedia specialist, FRTIB)** — Lead visual design, assisting in the implementation of the U.S. Web Design Standards. Assist with research recruitment, data collection, and analysis.

**Tanner Nohe (Project Manager, FRTIB)** — Meet regularly with 18F project team to ensure roadblocks are removed and progress is forward moving. Foster relationships with 18F and other stakeholders at FRTIB that are critical to the ongoing success of our work.

**Victor Zapanta (Experience designer/researcher, 18F)** — Lead research recruitment, data collection, and analysis.