Project Matching Hat User Testing Plan

We tested only the prototype with project list displayed first after check in.

←---- Before the Study ---→

Matching Hat Goals:
- The **'matching hat'** is a web service that recommends project teams to new members based on their skills, interests, and goals, and provides a way for new members to connect with project team leads via email.
- The **pain point** we are trying to address here is that new members usually would not stay or return if they don't find a project to work on within the first couple weeks. The **goal** of the matching hat is to facilitate the process of finding fitting project teams for the new members.

Goals: *What do we want to learn? What are the concerns, questions, and goals?*
- **Overall flow**: we want to learn if the overall flow is smooth and efficient
    - *Check-in:* we want to learn if it is a good idea to have check-in as the first step of the matching process.
        - Concern: does the email requirement make new members feel uncomfortable (though this is the standard process brigade is using now)?
    - *Github checkin*: we want to learn how users think of github check-in
        - Concern: Would users sign up to github (as brigadehub's goal) ?
    - *Profile creation*: we want to learn if the profile creation process is user-friendly
        - Concern: would users feel uncomfortable or tedious creating a profile? Any design flaws?
    - *Project list format*: we want to learn if the design of the project list enables users to identify projects that fit their interests and goals
        - Concern: can new members identify a project team with the current project list design? Is the design out of style?
    - *Connect*: we want to learn how users feel about the 'connect' function
        - Concern: would users feel uncomfortable connecting with project team leads? (it's a side pain-point we are trying to address)
- **Project list first, or matching first**: we want to learn which of the two prototypes better position users to use the matching service

Participants: *who will we recruit and how?*
- New members who come to Code for SF Hack night to find project opportunities to practice skills, contribute skills, or work on domain-specific civic projects at Code for SF hacknight, but don't necessarily have the time to read through the descriptions of each project yet.
- We will recruit 5 participants and conduct user testing in person, 2 of which should be non-programmers. Participants need to pass the screening process to show that they intend to work on a project.

Method: *Time, location, duration, method*
- **Time**: Wed 7-9p, Jan. 25 and Jan. 31
- **Location**: a quieter space at the hacknight (TBD)
- **Duration**: 30-40 minutes per participant
- **Method**: participants will be given a sequence of tasks, and asked to 'think-aloud' as they complete the tasks. Participants will not receive training beforehand. After the participants complete the tasks, they will be asked about their general impressions, the difficulties of the tasks, and what other thoughts they had that were not read out loud.

Tasks: what will we ask the participants to do?
- **Check in**
  - Scenario: You are at the Code for SF Hacknight orientation. You are asked to check in to help the Code for SF funders track participation.
  - Correct path:
    - Start at homepage "codeforsanfrancisco.org" -> click on "Hack Night Check in" -> fill out the form -> Click on 'Check in!' at the bottom.
  - Potential problems
    - Participants are unable to find 'hack night check in" on the homepage
    - Participants are confused about which sections are required vs. optional
    - Participants feel uncomfortable giving away email info
    - Non-programmers participants are confused about github account
- **Scan project list & matching hat**
  - Scenario (for _new _project list first): You just checked in. You are shown a list of projects, but you are not sure which project teams fit you the most. You notice the option of 'Matching Hat'. Show us what you would do here.
  - Correct path:
    - Browse project list -> click on "matching hat"
  - Potential problems
    - Participants find the project list hard to navigate or hard to read
    - Participants do not want to use the matching hat service
- **Profile creation**
  - Scenario (for _ new _project list first): You decided to use the matching hat service. You are asked to create a personal profile. Let me know when you are done creating the profile.
  - Correct path:
    - Use the drop-down menu to create the profile
  - Potential problems
    - Participants do not feel comfortable creating a profile
    - Participants do not like the design of drop-down menu
- **Decide on favorable project team(s)**
  - Scenario (for _ new _project list first): Matching hat provided you with a list of recommended project teams. You want to decide on a couple project teams that seems most favorable to you
  - Correct path

- Project list -> see description of a project -> (repeat) -> decide on a project
- Potential problems
  - Participants may have problems navigating the project list
  - Participants may not be able to decide the most favorable project team based on the limited information

Connect
- Scenario (for _new _matching first): You have decided on a couple project teams that you want to connect with. You want to reach out to them
- Correct path
  - Connect -> send -> next -> connected/done
- Potential problems
  - Participants feel uncomfortable connecting
  - Participants do not proceed to the last step 'connected'

←---- **Preparation work: Participant recruitment, Setup recording** ---→
Participant recruitment- screening question
- Can you describe in a few sentences what you want to achieve at the hacknight?
  - Criteria: there needs to be indication that the participant wants to join a project team.
  - It is not ideal to recruit new members that show up because they want to network, or because their teachers/friends/schools told them to come. Their motivation was not to join a project team to begin with.

For recording
- Quicktime -> under file -> new video recording, you can record screen or voice too

←---- **During the Usability Study** -----→

Testing script
I.   A friendly welcome
- "Thanks for helping us test out the matching app today! The web app we are testing today is called 'Matching Hat'. The purpose of the matching hat is to help new members identify project teams that may fit their interests and goals at the hack night. Getting your honest feedback is a really important part of that. In fact, I didn't design this prototype. So, feel free to share anything on your mind."
- "The interview will be pretty informal. I will ask you a lot of questions, but i'm not testing you- i am actually testing our designs. If you get stuck or confused, it's not your fault. In fact, it helps us find problems we need to fix."
- "Before we start, I want to ask you if it is ok that we share our findings with other brigade members. You can always let us know if you choose otherwise later."
- "I will start by asking some background questions, then I will show you some things we are working on. Do you have any questions before we begin? "

II. Context questions
- "Can you briefly tell me about your background in terms of your skills?"
- "How many times have you been to Code for SF Civic Hack Night? "
- "Can you describe in a few sentences what brings you to Code for SF? "
- "Do you plan to join a project team? (If yes) How do you plan to decide on a project team? "

III. Introduction of 'Think-aloud"
- "Thanks for providing your background information"
- "Before I show you our prototype, I would like to ask you to "think aloud" as we go through the process. Tell me what you are trying to do, and how you think you can do it, anything you find confusing, or anything you like. Here is a brief demo https://www.nngroup.com/articles/thinking-aloud-demo-video/"
- "Are you ready to look at our prototypes?"

IV. Tips for interviewers
- Stay attentive and neutral. Use 'um..um..' '
- Ask open-ended questions
    - Don't ask yes-no questions or multiple choice questions ("would you…" "do you…." "Is it….")
    - Do ask "5 Ws and 1 H" 'who...what...where...when...why...how…"
- Some questions to facilitate 'think aloud'. It is important to know that these questions should be easy to answer. Interviewer helps the subject think aloud, not anxious to find the right answer.
    - What do you think of that?
    - So what goes through your mind as you look at this?
    - What would you do next? Why?

V. Tasks
- " I am going to ask you to perform a sequence of 5 tasks. You should feel free to tell me anything that's on your mind, or stop the session at any time."
- **Check in**- " Let's say this is your first time coming to the Civic Hack Night. You join the orientation, and you are asked to check in. Please think-aloud as you proceed with check-in, and stop the action once you are done.
- **Scan project list and matching hat** - "Let's say you have already checked in. You see a project list on the screen, but you are not sure which project teams to join. You also see 'Matching Hat'. Can you tell us what Matching Hat is for, and what you would do here? "
    - If participants mention a lack of projects on the list, or the list doesn't look right, say "what would you expect to see here? "
    - "We don't have full data loaded yet. Please pretend there are many other projects listed in the same format. Okay? "
    - Once the participant confirms, direct them back to the task. Say as little as possible.
- **Profile creation**- "(optional) Let's say you decided to try the matching hat. You are asked to create a profile here. Show us what you would do here, and tell us anything that's on your mind. "
- **Decide on favorable project team(s)**- " Let's say these project teams match with some of your interests and goals. Can you show us how you would decide on two favorable teams from the list here?"

- **Connect-** "Let's say you have chosen two teams to reach out to. Can you show us how you would do that? "

V. Debrief
- "Can you tell us what worked well, and what didn't quite work in this prototype? "
- "Can you tell us if you liked or disliked any parts of the prototype?"
- "Anything else that you want to share with us?"
- Thank the subject in the end.