

HCDE 2020 Capstone Final Deliverable

# TraxSolutions Outcome Measurement Toolkit Redesign

*Empower every nonprofit organization with accountable success*

**Lime Creative**



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# | Capstone Overview

Nonprofit organizations are tracking an increasing amount of data in execution to determine the social impact of the programs they operate. This process, called outcome measurement, allows an organization to evaluate whether a given program is achieving its desired results. However, measuring the outcomes by deriving insights from a large amount of data are both time-consuming and technically challenging for many organizations, as revealed by our user research. As a result, less than 20% of current users are using the Outcome Measurement Toolkit (OMT) in TraxSolutions, a web-based software suite for nonprofit organizations built by our sponsor, nFocus Solutions.

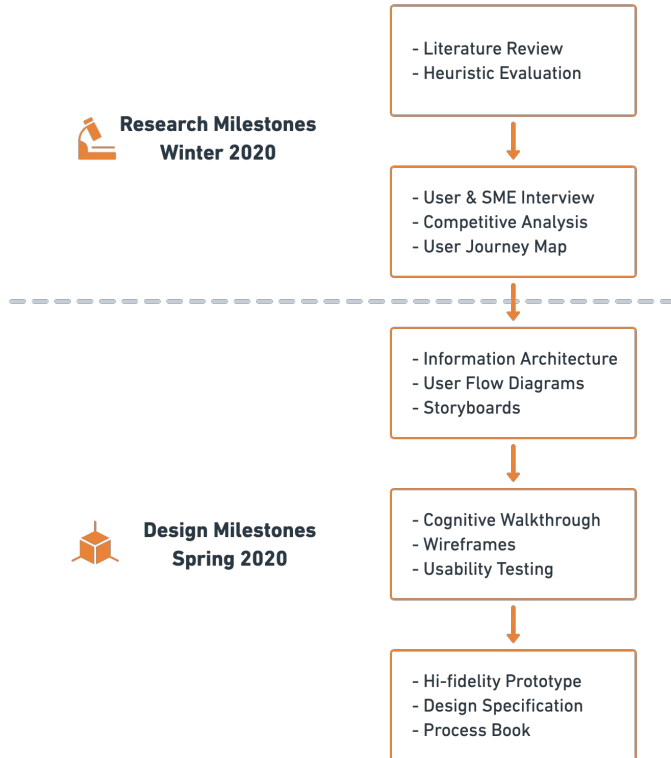
In this project, we redesigned the OMT in TraxSolutions by creating a unified and streamlined outcome measurement experience to enable users to rapidly quantify, analyze, and take actions to improve their social impact.

## Design Question

How might we create an intuitive and supportive experience for nonprofit program organizers to measure their outcomes?



# Design Process and Focus



## Design Focus

As informed by user research, we identified the following usability issues in the current experience of OMT:

1. Outdated and unresponsive experience causing a steep learning curve
2. Lack of highly requested feature for continuous performance monitoring

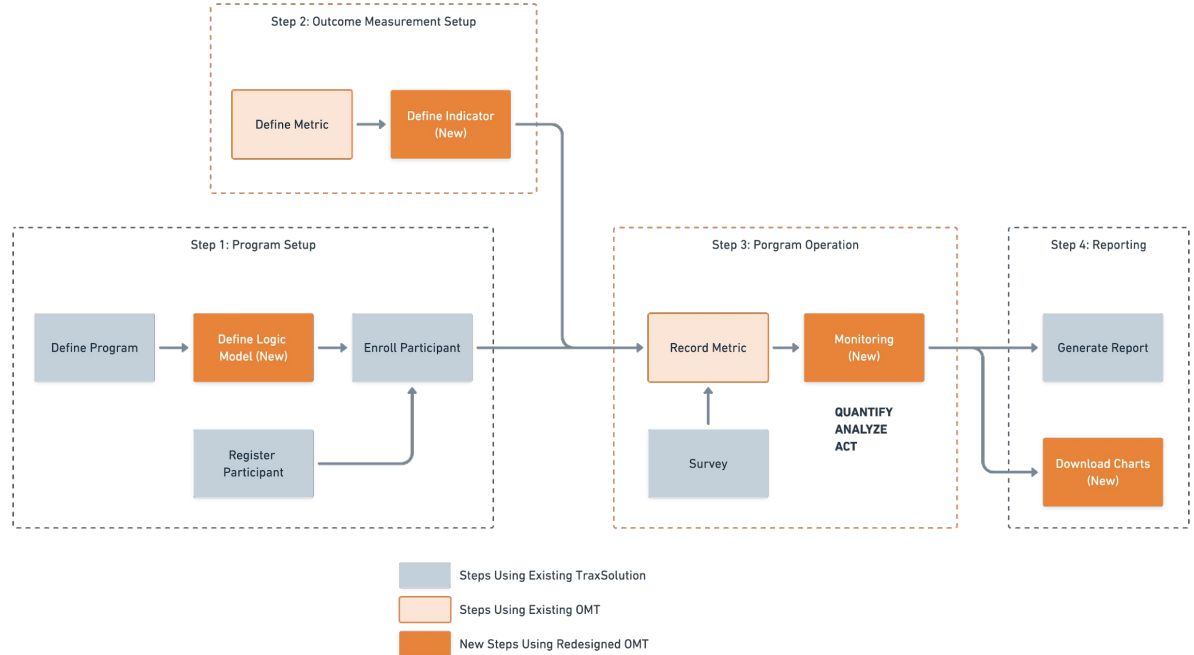
Our redesign of Outcome Measurement Toolkit is focused on delivering the following improvements:

- Supporting first-time users with step-by-step guide in the newly designed tutorial page to educate users about the outcome measurement process and drive more adoption.
- Surfacing the implicit relationship between current Outcome Measurement Toolkit with other TraxSolution components, putting it front and center at the redesigned and simplified user flow.
- Providing the much needed functionality and user experience of program performance monitoring that

# Redesigned User Flow

Currently, measuring the outcome in TraxSolutions requires using Outcome Measurement Toolkit with other features including Program Management, Participants Management and Reports Center. This process was not intuitive due to the high number of different surfaces users need to navigate between on themselves.

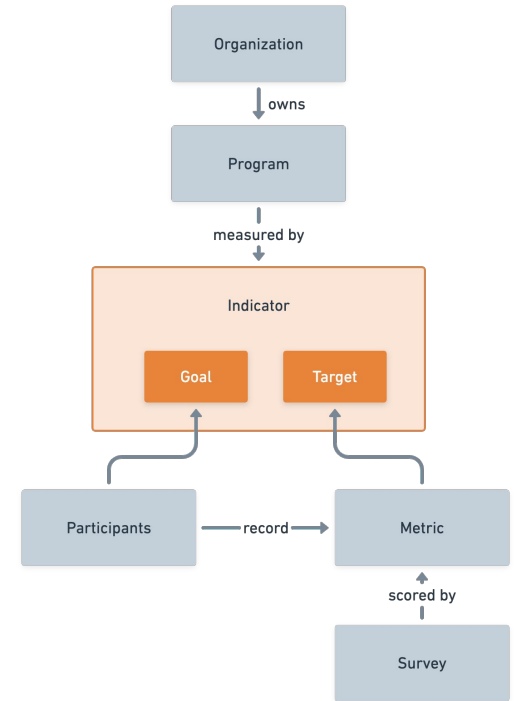
The redesigned user flow streamlined the process by combining and simplifying the steps to reduce the amount of navigation needed; introducing new design concepts, such as Indicator, to unlock key design requirements; and overhauling existing components, such as Logic Model, using same design language to ensure a consistent experience is provided.



## Core Design Concept: Indicator

Even though different nonprofit programs have various definition for outcome, the impact of programs are ultimately measured based on its participants, as we learnt from user research. The current Outcome Measurement Toolkit can track custom defined metric for each participant, but lacks the support to measure the outcome on programs' level for all its participants, which is a key requirement for performance monitoring. To address this need in the redesign, we introduced a new concept, namely indicator, to represent how many participants are considered "impacted" based on one or more metrics. Indicator connects all the key entities in Outcome Measurement Toolkit today, and becomes the most important signal for users to assess a program's performance. There are also two secondary concepts introduced that users can define for each indicator:

- **Target** is defined as a level or value for the metric to reach, by which the participant is considered "impacted".
- **Goal** is the amount of participants the program organizer can optionally define for the program to reach its intended level of impact.

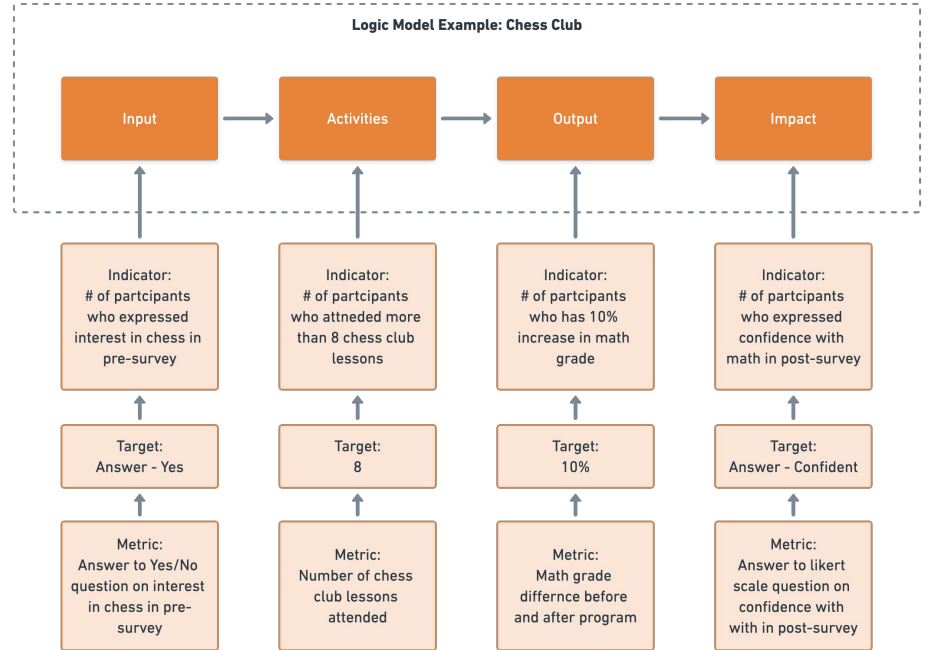


# Core Design Concept: Logic Model

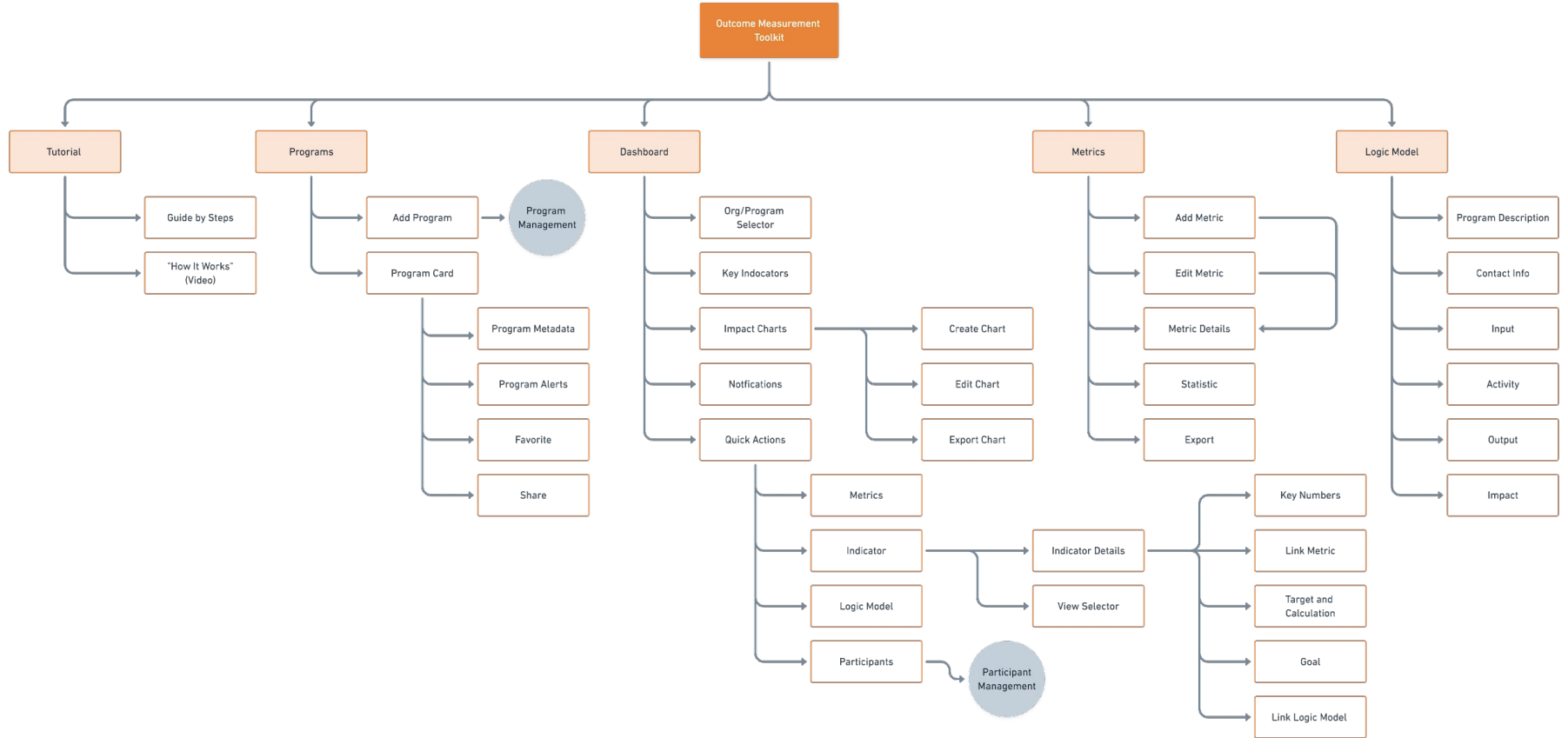
Logic model, as informed by user research, is a common practice by nonprofit organizations to direct their programs' design. Logic model is a feature of current Outcome Measurement Toolkit but serves documentation purpose only and cannot be leveraged for outcome measurement, which result in low user adoption.

Logic model is redesigned to help users taking a more directed approach to outcome measurement. This was achieved by two design changes made in the redesign:

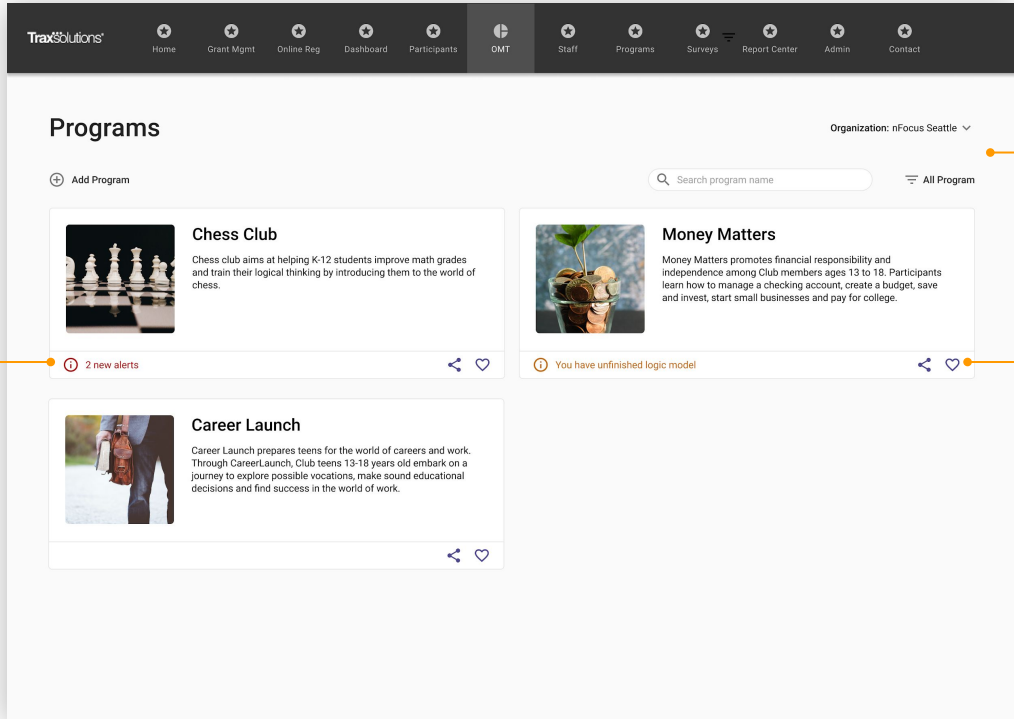
1. Encouraging more users to setup logic model by inserting it into program creation flow of TraxSolutions, which also provides an additional entry point for outcome measurement.
2. Each step of logic model can be associated with one or more indicators. By connecting logic models with indicator, new scenarios can be unblocked to help users better understand how the program is delivering its intended impact, and identify potential improvements for each step.



# Information Architecture



# Final Design



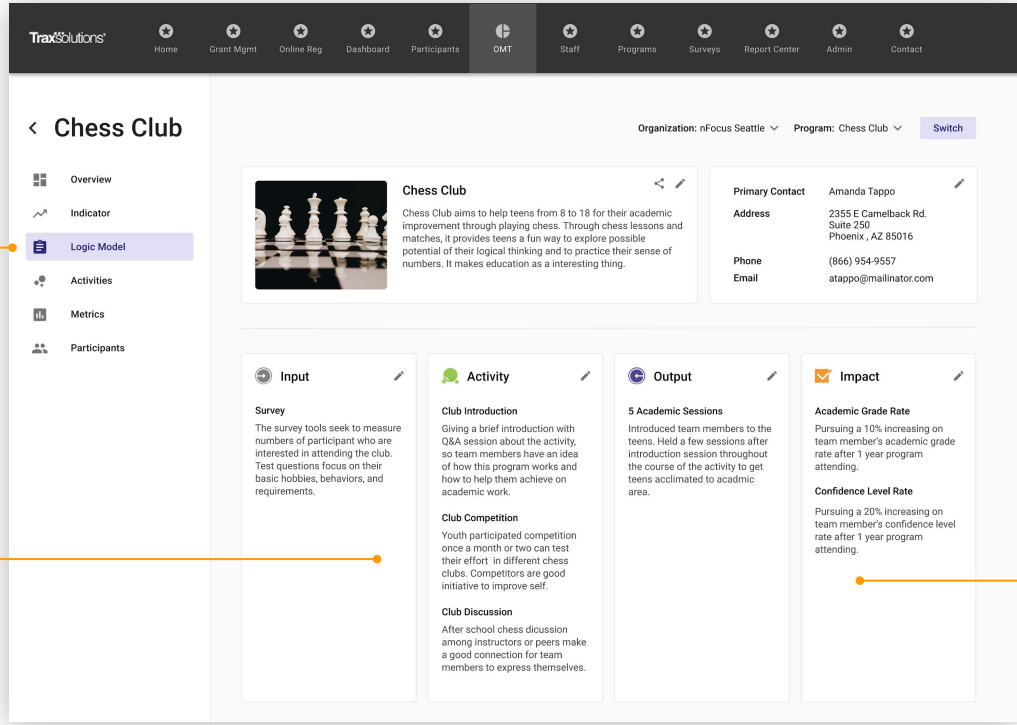
Actionable alerts for quick insight

Org selector and filter for easy management

Options to share or favorite a program for quick access



# Final Design

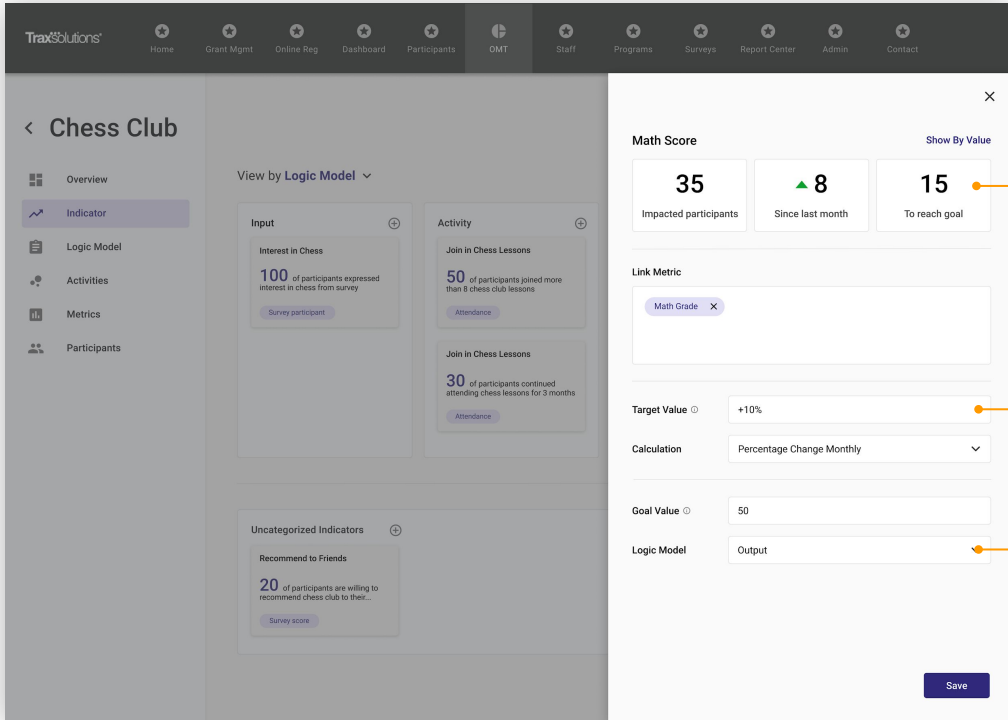


Seamless integration with rest of OMT

Link each step with indicator for program-level monitoring

Clear demonstration on how program leads to impact

# Final Design



Key numbers reveal insight for each indicator

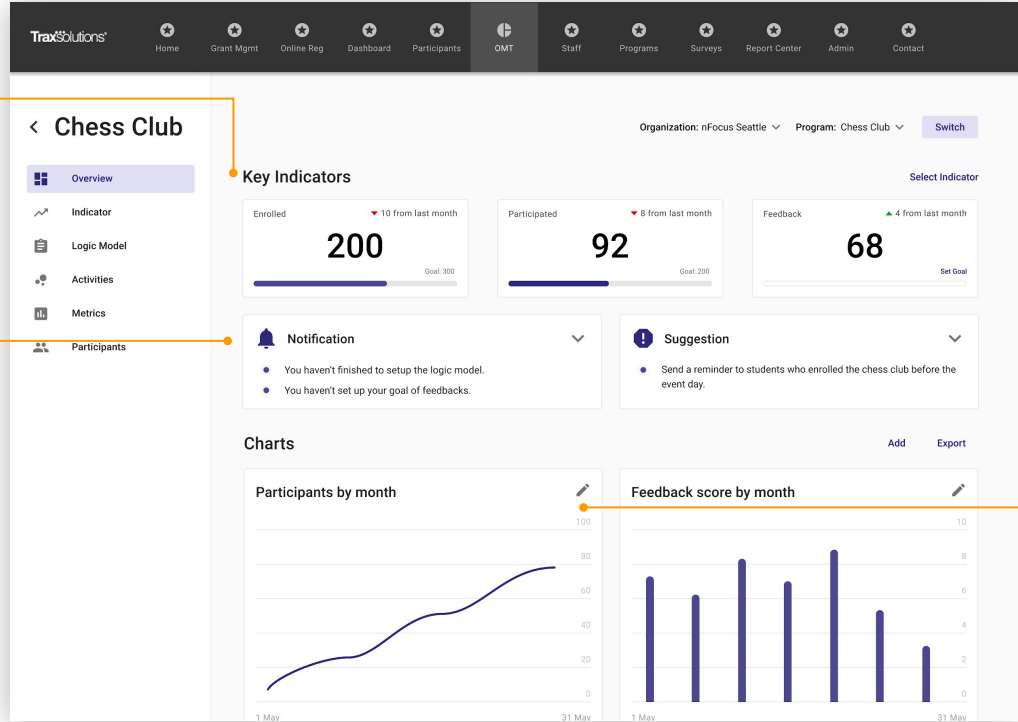
Target and customizable calculation makes each indicator meaningful

Indicator enables quantification of each step of Logic Model

# Final Design

Key indicators provides quick insight into what's most important for the program's performance

Notifications and AI-powered suggestions help organizers optimize the program for greater impact



Customizable charts provides data visualization and enables continuous performance monitoring

## | User Story

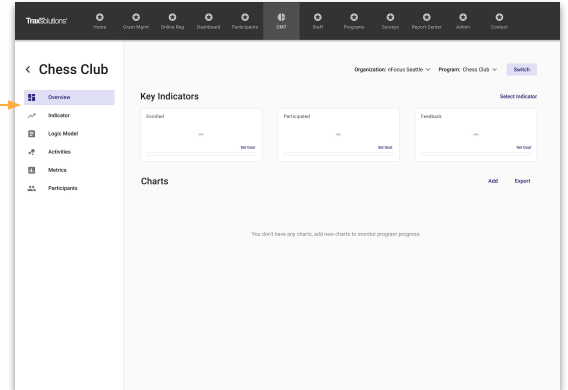
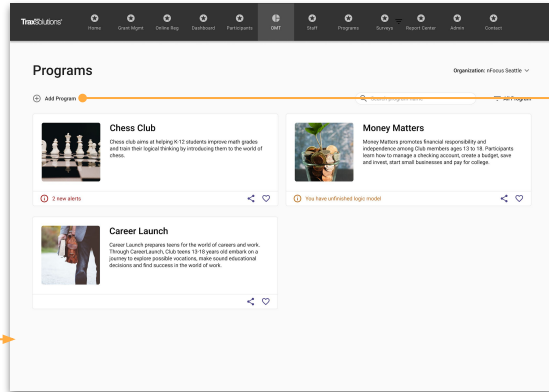
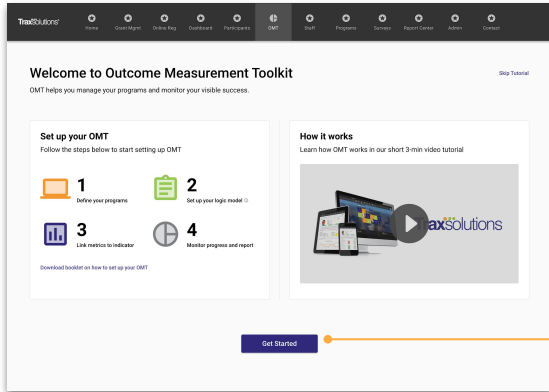
**Keisha** Senior program manager of Reasoning Mind, a nonprofit organization focused on academic success of students from underserved communities. She manages all programs with the target audience of high school students.

Keisha is tasked to set up a new program, Chess Club, based on the hypothesis that practicing chess will improve students' mathematical ability. Chess Club will organize weekly activities including chess lessons and competitions. The goal of Chess Club is to help students achieve better grades and build confidence in mathematic.

As a current client of TraxSolutions, she wants to use the redesigned Outcome Measurement Toolkit to monitor and measure the impact of this program for the next six months, in order to decide if the program should continue into next year.



# User Story: Setting Up New Program



## Tutorial Page

Keisha reads the information on tutorial page to understand the steps to create and setup a program for outcome measurement.

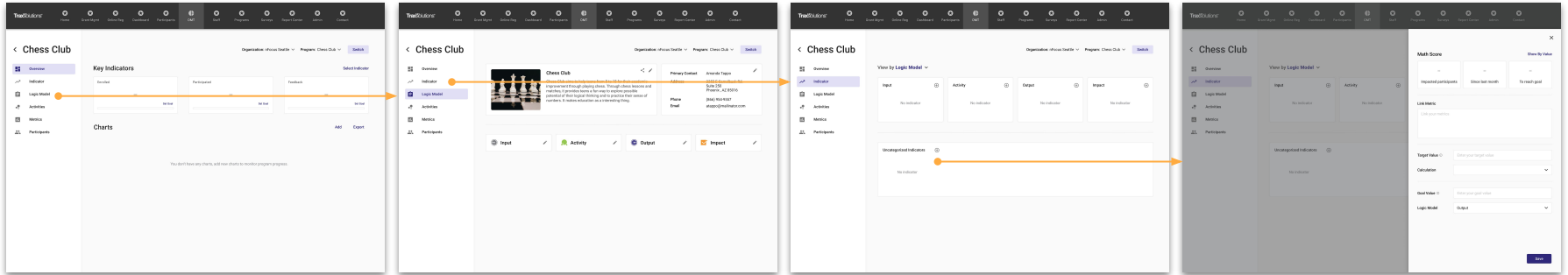
## Program Menu

On program menu page, Keisha can create new programs as well as gain insights from other programs of her organization and their performance.

## Dashboard

Keisha can set up the dashboard for newly created program and use quick actions to manage its related assets, including its metrics and participants.

# User Story: Setting Up Outcome Measurement



## Dashboard

In the program overview dashboard, Keisha can pin top indicators on top and create customized charts to monitor progress.

## Logic Model

Keisha can first set up logic model on the logic model page. This includes Input, Activity, Output and Impact for this program.

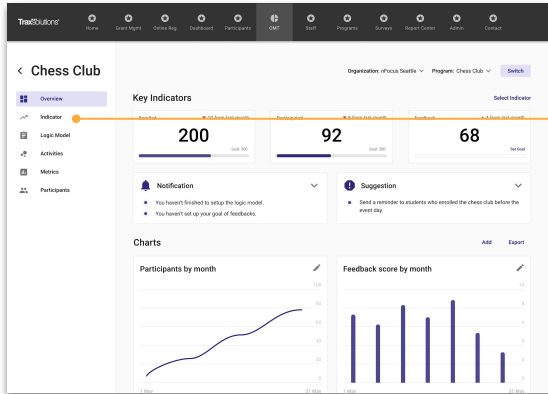
## Indicators

After setting up logic model, Keisha can go to Indicator page to create new indicators and map them to the logic model.

## Indicators detail

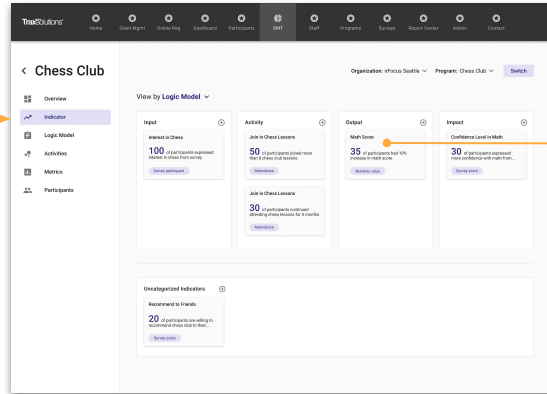
Keisha can create new indicators, set monthly or quarterly goals, and link metrics to the indicator.

# User Story: Monitoring Program Performance



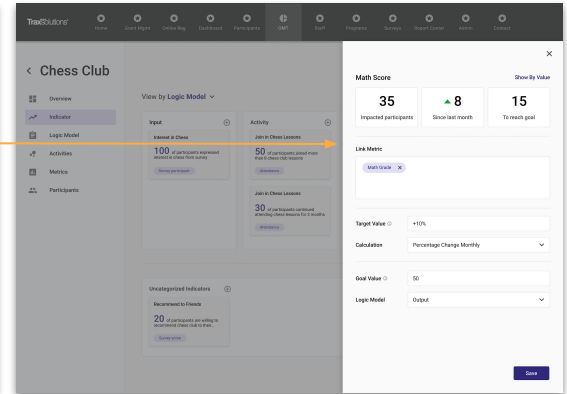
## Dashboard

Keisha finished setting up the dashboard for chess club. The data has been recorded in the system, so she can monitor the indicators and charts.



## Indicators (Logic Model)

On the indicator page, Keisha can see the tangible values for each outcome indicators after setting up the logic model.



## Indicators detail

Keisha can view and edit on each outcome indicator detail. She can link metrics such as attendance and survey to get the real-time result.

## | Concept Testing

The concept testing sessions allowed us to share our prototype with 4 users and helped us understand if the design meets the needs of the target audience. It was conducted one-on-one with participants remotely.

The overall feedback received from participants were positive. The design allowed them to easily see and understand the information presented. There were two new concepts that we were especially interested in receiving user feedback on. One of them was the dashboard showing an overview of the program progress and the other one was the screen that allows users to create indicators and track progress.

*"Our organization values pictures, graphs and diagrams. I really like the dashboard, great to have flexibility in the charts, and nice overview."  
Participant C*





## | Feedback and Improvements

We learned from the concept testing that participants perceived the dashboard as a good tool to help them monitor progress especially for those program leaders who might not be experts in data analysis. In addition, the page of creating and monitoring indicators was also well accepted by the participants.

To improve the OMT redesign, we addressed user feedback in the final design iteration that fit within the scope of this project.

- Logic Model page:
  - Added a share function. This would allow organizations to share their logic model easily with stakeholders and funders.
- Program overview:
  - Enabled search function on program overview page. This would improve findability of programs on the program list page.
  - Removed data collection progress status as users thought they were not helpful.
- Dashboard:
  - Created empty states to better illustrate the user flow.
- Indicator page:
  - Added the option to display data as percent of total. This gives the users different ways to view their data and help with their analysis.
  - Change the indicator comparison window from weekly to monthly or quarterly, which is more common for our users.
- Overall:
  - Added tooltip to explain terminology. This would help users understand what the terms mean when setting up their OMT.

## | Future Design Explorations

### Customizable dashboard

- Filters for the charts: To make the dashboard even more customizable, further research is recommended to understand which filters would be useful in monitoring different kinds of data.
- Types of data visualization: From our user research, we learned that organizations have various types of fundraising-related data that they are interested in collecting. Some might be qualitative data. Additional research is recommended to understand how to best visualize those qualitative data on the dashboard.

### Logic Model and Indicators

- From our concept testing, users have expressed interests in having the option to see indicators inside their logic model. Future designs can explore different ways to best present both the indicators and logic model together.