



# **Civic User Testing Playbook**

## **Technology and Innovation Department**

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# Project Overview

# Project Overview

Civic User Testing (CUT) is a process used to gather public feedback to evaluate the usability and effectiveness of digital services and products intended for public use through active community outreach and engagement.

## Project

- Develop a Civic User Testing Playbook for City staff that includes best practices, standards, templates, guides, training, and additional materials to facilitate the use of CUT in the development of digital services. Development of the Playbook will use an equity lens to promote accessibility, transparency, and public communication for the City's digital services.

# Project Overview

## Purpose

- In alignment with the Smart City Initiative Strategy and 2030 Strategic Vision, the City is committed to develop channels for community codesign with residents, small businesses, and other stakeholder groups to center user-experience in the development of digital services
- By incorporating user feedback and focusing on user-centered design, governments and organizations can enhance the overall user experience and ensure that digital services are user-friendly, accessible, inclusive, and effectively meet the needs of all intended users



# Methodology

# Methodology

## Review Reference Materials

- City materials, articles, papers, books, media
- Outside agency materials and websites



## Stakeholder Interviews

- 10 qualitative interviews with city staff
- Interviews with outside agencies including City of Asheville and City of Boston
- Interviews uncovered major challenges to implementing CUT and City best practices



## Independent Research

- Conducted further research informed by interview findings
- Compiled research and findings to create first draft of Civic User Testing Playbook



# Playbook Feedback



# Playbook Feedback

- 2 focus group sessions with staff across city departments
- Used Miro boards to guide group discussion and record participants' feedback
- Discussion covered several topics such as general first impressions, what worked well, areas for improvement, and feedback on specific tools (Equity Checks, Sample Language, Templates, etc.)
- Analyzed focus group feedback and implemented high priority changes into a working version of the playbook



# Playbook Outline

# Playbook Outline

Introduction

1. Getting  
Started

2. UX Methods  
& Prototyping

3. Recruitment

4. Test Design

5. Testing  
Sessions

6. Iterative  
Design

Additional  
Resources

# Playbook Outline

## Introduction

- Definition of CUT
- Benefits of using CUT and risks of not using CUT
- How to use the playbook
- When to utilize CUT
- Overview of CUT process

## 1. Getting Started

- Planning for CUT
- Including CUT in RFPs and vendor contracts
- Designing for equity
- Budgeting adequate resources and time for CUT process

## 2. UX Methods & Prototyping

- UX methods and research practices that promote community engagement
- Encourages user-centered approach to design
- Importance of defining end-users

## 3. Recruitment

- Guidelines to create effective and inclusive communication materials
- How to create a sign-up form that collects adequate information for recruitment
- Outreach methods

# Playbook Outline

## 4. Test Design

- Instructions to design a user test
- Guidelines to create test scenarios and tasks
- Testing methods
- Writing a test plan

## 5. Testing Sessions

- How to run a testing session
- Creating a test script
- How to moderate testing sessions
- How to record and collect data
- Providing food and snacks
- Setting expectations on compensation

## 6. Iterative Design

- How to analyze data from testing sessions
- How to develop actionable recommendations
- Creating a test report
- Implementation of feedback
- Ongoing testing

## Additional Resources

- Information on additional resources
- Link to centralized tools, templates, guides, etc.

# How to Use Playbook

# How to Use Playbook

- Playbook is modular and not meant to be read in its entirety
- Staff may use table of contents to identify sections most relevant to them depending on their knowledge of CUT
- If staff would like more information on certain phases of CUT, additional reading materials are provided in each section
- Playbook contains various tools, guides, templates, instructions, and examples for staff to use as needed



# How to Use Playbook

## Template – Recruitment Email

**Subject Line:** Opportunity to earn a \$25 gift [card](#)

Hello {**name**},

The {**department name**} [at](#) the City of Long Beach would love your help testing {**name of product/service**}. Your feedback will help us better understand your experience and make our product as accessible and user friendly as possible.

**{Insert brief description of product/service (2-3 sentences)}**

Can you join us for {**duration of testing session**}, on {**date and time**}, for an in-person/virtual session?

If you are interested, please fill out this [form](#) {**insert link or QR code to form**} to sign-up. If selected to become a tester for {**name of product/service**}, you will receive a \$25 gift card for your participation.

Your stories and feedback, both positive and negative, will help us figure out how to better serve residents such as yourself.

Thank you for your partnership,  
{**Email Signature**}

## Tool – General Format of a Test Script

- Document Overview
  - Provide a brief overview of the product or service, goals and objectives, purpose, and what information is included in the [script](#)
- Introduction
  - Script introducing the moderator, product or service that will be tested, and structure of the [test](#)
  - The script should set expectations for participants and explain how participant feedback [will be utilized](#), this ensures we are being transparent with our testers
- Pretest Interview Questions or Tasks
  - Before you engage in the scenarios and tasks, you may want to ask your participants a few questions relevant questions before they begin the test to make them more comfortable and better understand their relationship to the product or [service](#)
- Research Tasks
  - Provide a script for each of the research tasks you will ask your participants to [complete](#)
  - Include templates or space for the moderator and observer to take [notes](#)
- Post-test Interview Questions or Tasks
  - Ask participant open-ended questions to capture last thoughts and reactions on the product or [service](#)
  - This is a great opportunity to gauge user satisfaction



# How to Use Playbook

## Examples in Action – Activation of Harvey Milk Promenade Park and Equality Plaza

During the activation of Harvey Milk Plaza, the Parks, Recreation, and Marine Department engaged in user testing of different equipment that could be used to activate the space. The Department issued a Request for Proposals (RFP) to vendors for different equipment (e.g. benches, exercise machines, etc.). Vendors installed their equipment in the plaza for one month while staff observed which equipment was being utilized, how the public interacted as well as conducted surveys. This simple test to collect feedback helped inform the Department of which equipment to install permanently at the plaza.

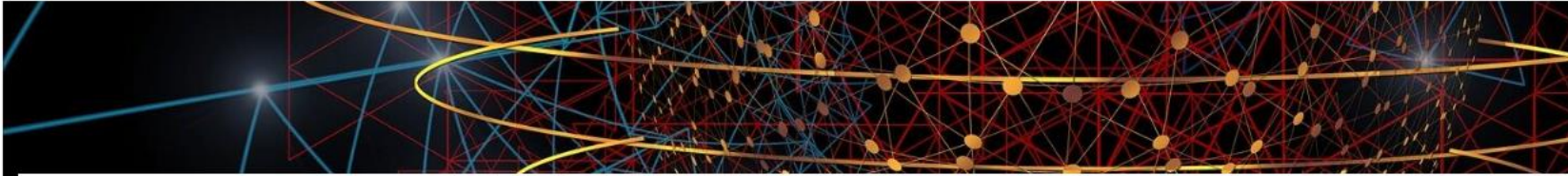


## Equity Check 1!


As you move forward in the design process of your project, ask your team the following questions and discuss as a group. These group discussions will help identify any changes or adjustments to your team's approach to ensure equity.

- Are we designing for equity?
- Did we engage with the public during the design process?
- Did we engage a representative sample of our intended users?
- Did we develop Personas? Do any of our Personas have any special needs, additional barriers, or disabilities? How did we accommodate or address for those needs during the design phase?
- Is our prototype accessible to disabled users?
- Did we test our prototype for accessibility?
- Is our prototype in compliance with WCAG?

# How to Use Playbook









## CUT Playbook Resources and Materials


 Amisadai Licea  
MANAGEMENT ASSISTANT


... > Civic User Testing > Playbook Resources and Materials [See all](#)


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 Digital Playbook


 Hotjar


 UXtweak


 User Interview Launch Kit


 User Experience Toolkit | City of Boston


 18F Methods


 The CUTGroup by Daniel X. O'Neil

 Maze

 Understanding WCAG 2.0

 User Experience Guide | City of San Jose

 Digital.gov

 Usability.gov

## Next Steps

# Next Steps

## Finalize Playbook Content

- Incorporate feedback from TIC, TID leadership, and focus groups
- Finalize content and create a final version

## Ground Truth Playbook

- Select a digital services project to ground truth playbook
- Analyze effectiveness of playbook and make adjustments as necessary

## CUT Awareness Training

- Roll out CUT awareness training across city departments
- Educate staff on the importance of using CUT to advance equity and accessibility

A nighttime photograph of the Long Beach skyline. The city lights, including several tall buildings and palm trees, are reflected in the calm water in the foreground. A semi-transparent white rectangular box is overlaid on the left side of the image, containing the word "Questions?".

Questions?





Thank you

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