this needs typos fixed

Team Leader Hub/Dashboard/Tool

Research to date as of 10/19/19 and upcoming research
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Overview of research that will inform the design of a stand-alone team leader 'tool'. This tool will leverage and improve existing systems for team leaders to manage their projects, see their volunteer history, and browse and sign up for projects. It is conceived as a one-spot experience for all things relevant to the team leader experience.

PAST RESEARCH

In preparation for our initiative to support team leaders through product and organizational efforts, I reviewed previous research. During my previous work on understanding volunteer motivations and shaping project displays to match them, I interviewed 10 team leaders. During a lightweight evaluation of onboarding I interviewed another 4.

Findings from previous research

- Team Leaders find the email platform cumbersome and often use external workarounds (e.g. for the project reminder the night before: "**Text me** your status"). And a steady and reliable team leader (since 2011) **"the NY Cares e-mail system is 20th century and makes interaction between TLs and volunteers incredibly cumbersome."**

- Team Leaders use a variety of methods to communicate with community partners. They communicate frequently, and the communication needs to be immediate. A common pain point is alignment between the number of volunteers to clients. "Tuesday mornings...**before the program will start. I'm asking how many kids are we having** for this session **so I can match the volunteers**, but sometimes not everyone participates. So, I **try to be in touch with everyone**, community partner and volunteers."

- Taking attendance is a significant pain point Volunteers have all sorts of workarounds depending on the number of expected volunteers, including using paper or even creating a **new document in a mobile phone** 'notes' file then filing the report after the project.

- Inability to correct attendance reports after they are filed…
  presents another issue, particularly when a team leader is trying to enter attendance at the time of the event, and they mis-enter an attendee or else a no-show.

- Communicating with New York Cares program managers can be difficult due to staff turnover. Volunteers spoke of trying to retrieve previous email communications to try to figure out whom to contact on staff.

- Frustration with the ability to co-team lead or **to solicit an alternate team leader**.

- Project discovery: Frustration with filters, including the desire to see what **projects were newly listed in the past week**, as well as the desire to be notified when certain types of projects were posted.

- Frustration with the **lack of a calendar view** for searching for projects, in terms of being able to see projects happening on a specific date. As well, frustration with not being able to book far into the future.

- Frustration with the **lack of an at-a-glance summary of personal project history**, including knowing the ratio of volunteering to team leading.

- That the project evaluation form is long and vague.

UPCOMING RESEARCH

Understand and define the types of product refinements and organizational changes that could improve the experiences of our team leaders. Research will include usability testing, contextual research, data analysis, and tree testing.

This spreadsheet shows types of functions that the hub/dashboard/tool might need to incorporate, and the types of research needed to inform design decisions. The spreadsheet content is reflected in the following lists: [note: link removed when this doc is shared beyond the org}

1. Usability Research with Team Leaders
Method: Remote, moderated interviews

Sample size:15-20 team leaders
Time: 3 weeks, from Jan 10-30 2020

Recruit pool criteria to include: low tech TLs, highly vocal TLs, new TLs, longtime active TLs, co-team leads, TL of projects with lots of volunteers, TL of projects with few volunteers, TL of projects that have lots of new volunteers, TL of projects with seasoned volunteers

Observation of
1. login flow
2. The manage project flow including:
    - email communication to volunteers (and platform bypasses)
    - co-team leading specific (how, management issues, communications)
    - community partner communications (why and platform)
    - project manager communications (why and platform, including cancellations and issues on project)
    - taking attendance
    - co-team leading specific (how, management issues, communications)
    - View aggregate project data

3. Project discovery flow
    - Browse, including filter applicability
    - Sign up
    - Co-team lead

4. Project sign up flow
    - Notified of acceptance

5. Team Lead Resources
    - how often used
    - lightweight content audit

2. Contextual inquiry
Internal Research with Staff
Method: In person, moderated interviews
Sample size: 4-5 staff

Time: 2 days scattered in Jan 10-30 2020 window

Questions to ask
- Co-team leader, appointing and managing, and pain points for staff
- Committed project flow
- Bilingual team leaders
- Community partner communications re fullness
- Team leader communications re fullness
- Team leader cancellations
- Alternate team leader arrangements
- Accepting team leaders on a project, who has the responsibility and how long does the process take?
- Project evaluation feedback
- Team leader resources, plans to update?

3. Quantitative Research

Method: Salesforce reports, Drupal email tracking

Time: ongoing

Avenues of inquiry

Drupal Email data:

- discern cadence of reminder and thank you emails from team leaders to volunteers
- assess burden on team leaders of maintaining the email exchange
- assess whether or not emails are sent at the optimal time in the lifecycle of a project and for the optimal user experience

Saleforce data:

- Of users with the status team leader who have been active this year what percent volunteered as Team Leads versus Volunteers?
- Range of size of projects in terms of the number of volunteers attending
- Percent of team leaders active more than once this year who were active two years ago, one year ago.

- Number of evaluations per project submitted over the past three months
- Filter types and frequency on the project that need a team leader page.

4. Discoverability research

Methodology: Remote unmoderated
Sample size: 20-30 participants total, including 5-8 team leaders
Time: 3 successive rounds of tree testing, ongoing since Fall 2020
Platform: Optimal workshop

This ongoing series of tree tests is aimed at improving navigation in the old website, in preparation for the new one. Several questions in the tree test are directly aimed at the recruitment and ongoing experience of team leaders.
The results suggests
- the current configuration well supports team leader recruitment
- it does not support the breadth of knowledge that mature team leaders need.
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The test will be rerun when the new team leader hub is fully functioning.

Findings so far:

Team leader recruitment

You are thinking about becoming a team leader. You would like to know more about what might be expected of you in the role. Where would you find that information?

89% success rate

Team leader experience and opportunity discoverability

You are a team leader. Last year you led a project that helped students fill out forms for federal aid for college tuition. You would like to know if similar projects are happening this year. Where would you find that out?

14% success, 57% fail