APPROACHES FOR HUMAN-CENTERED DESIGN IN TECHNOLOGY INITIATIVES

A COLLECTION OF INSIGHTS FROM SURGE OPTIMISM

SURGE 2018 OPTIMISM

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INTRODUCTION

The following pages house the results of an industry-wide virtual collaboration.

SURGE Optimism assembled association professionals from across the globe to harness collective knowledge, through a virtual conference focused on transformative ideas and designed to maximize social learning.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own thoughts. We have now assembled some of the best insights from these conversations into a body of knowledge for the benefit of the entire association community.

This eBook delves into the session, *Approaches for Human-Centered Design in Technology Initiatives*. It includes themes from the speakers' conversation, snapshots of ideas from guest speakers, contributions from attendees, links to further resources, and more.

Thank you to all who participated – and if you missed it, go to the **SURGE** Optimism event page to watch all the sessions for free, at your leisure

TABLE OF CONTENTS

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01

FEATURED SPEAKERS

Gordon Withers
Director of Digital Services, Fionta

As Director of Digital Services at Fíonta, Gordon oversees the organization's web design and development group, ensuring that Fíonta delivers the highest-quality services to its nonprofit, association, and foundation clients. Gordon also consults on the technology needs of web projects, which includes analyzing clients' technical capabilities, identifying areas for improvement, and recommending new technologies and integrations.

Prior to Fíonta, Gordon served as a technology consultant at two other nonprofit-focused agencies: Freeflow Digital and Threespot, working on accounts such as the Grantmakers for Effective Organizations, Cystic Fibrosis Foundation, Pew Charitable Trusts, and NOAA. He also served for five years as the Director of Web Services at NAFSA: Association of International Educators, the leading association for international exchange in higher education. During his time there, he led several high-profile web technology projects, including an award-winning redesign of nafsa.org. Prior to NAFSA, Gordon spent over 10 years as a business analyst, web developer, and programmer.

Amy Burke

VP, Member Engagement, MCI USA

Amy Lestition Burke, CAE, MA serves as Vice President of Member Engagement for MCI USA, a creative solutions provider to help organizations create communities and new levels of engagement. Burke focuses her work on association management and consulting for MCI USA's clients, including strategic communications and marketing to organizational development and change. Her role as ASAE's Membership Council has positioned has positioned her as the go–to expert for membership strategies around both retention, recruitment and engagement. Within MCI USA, Burke currently serves as executive director for the Special Libraries Association (SLA), a nonprofit international organization for innovative information professionals and their strategic partners.

Previously, Burke served as the chief operating officer for the Psychiatric Rehabilitation Association (PRA) and Psychiatric Rehabilitation Foundation (PRF), where she implemented aggressive stakeholder engagement strategies for both professional and trade association members. Through her work with MCI USA's consulting clients, she has also provided insights to various non-profit organizations, including International Technology Law Association, American Medical Student Association, Regulatory Affairs Professionals Society, American

School Health Association, the ESOP Association, and National Child Support Enforcement Association. Previously, she served as executive vice president for the Photo Marketing Association International (PMA), managing enterprise-wide operations across four international offices and managed a CDC Grant awarded to the Interstitial Cystitis Association (ICA). From 2006-2012, Burke served as executive director of Association Media & Publishing (AM&P), where she led several critical initiatives, including name change and rebranding, membership re-structure, editorial strategy, and program content and management.

Harry Rothmann
Chief Technology Officer, Association of the United States Army

Harry Rothmann joined the Association of the United States Army in July 2014, and currently serves as the Chief Technology Officer.   Harry has a BA from the University of Maryland in Communication, and has over 15 years of experience working with technology at non-profit organizations. Harry previously worked as the Director of Internal Operations at Society for Science & the Public, as a Consultant for the technology firm Accenture, and as a Sr. Technology Specialist at the American Society for Cell Biology. In addition, Harry serves on the Board of Directors for CAUSE, Comfort for America's Uniformed Services, a non-profit which organizes programs that promote recreation, relaxation, and resilience for wounded, ill, or injured members of the U.S. Armed Services.

Emily Hendershot

**Community Strategist +
Operations Consultant, Nova
Strategies**

Emily Hendershot is a results-driven community strategist and operations consultant who enjoys equipping and empowering organizations to achieve their missions and thrive in ever-evolving industries. With ten years of progressive nonprofit leadership experience, Emily helps professional associations, user groups, and nonprofits strategize their impact, streamline processes, and train volunteer leadership to enhance their organization's impact.

02

HOW TO APPLY HUMAN-CENTERED DESIGN TO ASSOCIATION TECHNOLOGY INITIATIVES

This approach could change the way you work with tech.

BY GORDON WITHERS

Have you ever struggled with issues of technology adoption, mismatched expectations, or the perception of your organization as behind the times? The use of technology can change the way people think about you as an organization, for better or for worse.

Human-centered design is a framework for projects and decision-making which can be particularly useful for embarking on new technological ventures. As a published framework, it is fairly new, although IDEO, the firm that developed it, has been using it successfully for several decades. Human-centered design and the concepts behind it are especially applicable to membership organizations, because human-centered design focuses on putting ourselves in the shoes of our members and the users of our products. **The framework can be applied to any organizational initiative, from developing a publication, to designing an event, to improvements to your physical office space.**

IDEO segments human-centered design into three phases, while other adaptations use four, five, or even six steps. This four-stage version most closely matches association technology initiatives.

Stage 1: User Research

User research is important for any initiative. While it is often skipped, especially in organizations where budgets are tight or people have a fixed idea of what they want to do, it may be the most important piece. **Most associations have some data on hand, even if it's anecdotal or a three-year old member survey.** Anything is better than nothing.

Recommended tactic: [Immersion](#)

Associations are uniquely positioned to execute human-centered design, given the close relationships they have with their members. Have you ever considered observing members in their day to day work? **Shadowing people doing their day-to-day job can be illuminating in truly understanding where their pain points are** and how your organization can offer solutions.

Stage 2: Ideation

The second phase of human-centered design is ideation: the process of coming up with ideas to ease these pain points, or imagining what the next version of an offering will be. **An ideation process does not have to be an extended and time-consuming one.** It could be a single three-hour workshop at conference with a facilitator present to gather up ideas and choose two or three to test.

Often, ideation can start with simply taking a look at peer organizations, other associations in your space, or even similar for-profit organizations: what are they doing and where are they succeeding? This is especially helpful if you're stuck without ideas or want to consider partnerships to move your whole industry forward.

Recommended tactic: [Card Sort](#)

During ideation, run a simple card sort exercise with a few of your members. The way they react to and rank words and phrases will help clarify what is truly important to them – and give you insight into which of the association's product ideas will resonate, and which should be discarded.

Stage 3: Iteration

The next phase is taking your ideas and prototyping them. Build a test product and then try it out and iterate on it within a set amount of time. You can match iterations to budget funding cycles if money is an issue; and prototypes can be made cheaply. Depending on your stakeholder landscape, a committee can be engaged to give their feedback on these iterations, with progress reported back to the association's board.

Recommended tactic: Storyboard

A prototype doesn't always have to be high-tech. A simple storyboard exercise might be perfect for testing out a concept, portion of the product, or simulating an interaction with members. **Start simply, figure out what is working, and build to more high-fidelity iterations.**

Stage 4: Implementation

In many association projects, prototyping and implementation occur simultaneously. In the human-centered design approach, it is split up so that once you have tested a product, you know exactly what works and what to implement. Therefore, the implementation process should run more smoothly. **Transparency is the name of the game for implementation.** What will you measure to gauge the success of the new project? How are you going to communicate its purpose to members?

Recommended tactic: Define Success

How do you tell if implementation is a success? **Define success metrics in advance so you can track them throughout the project** – and remember, the perception of success may differ between association staff and members. Success metrics may also change over time, but having defined them at the start, you can adjust as things evolve throughout these stages.

If you do spend time researching human-centered design, you'll find that different techniques for listening and interviewing are at the core of it. The most important part is having empathy for your users and members.

If you are interested in learning more about the techniques the specifics of human-centered design, start with [IDEO's official guide](#) to the process.

Editor's note: The author would like to thank the other speakers - Amy Burke, Emily Hendershot and Harry Rothmann - for their informative contributions to the session and to this article.

From the Chat - The Power of Your Chosen Perspective

How you look at your situation can drastically impact the outcome!

"When you are a kid, you don't think about failure, it is how you learn something. Oops, won't do that again! We get taught at school failure is bad. However in the process of innovating, you have to be prepared to fail often and fail early in the process in order to learn what works. To do that, just get yourself into a child's mindset again!"

— Clive Roux —

"I developed a technique called "Flip It." When I'm too close to something or can't seem to break through on a problem I flip it - I look at from a completely different perspective. It helps but doesn't replace objective input."

— Cecilia Sepp —

03

HOW WE TURNED A HACKING DISASTER INTO AN OPPORTUNITY

What do you do when your websites go down just before the event of the year?

BY AMY BURKE

Picture the scene: it's six weeks before our annual conference. Preparations are in full swing. Members are registering through our websites as usual. Then, our main site and all of its components are hacked. End of the world, or an opportunity for improvement?

The Special Libraries Association (SLA) has 107 component websites hosted on WordPress, for geographic chapters and special interest groups. Beginning in April, the Special Libraries Association underwent a series of hacks coming from all over the world. Our IT person was snowed under trying to get the situation under control. These websites were managed by volunteers with varying levels of technological capability, so they weren't very secure and passwords could be found easily. **SLA's main website was blacklisted as a result of this because they were all on one server.**

In the midst of preparation for our biggest event of the year, we couldn't do business online and neither could our components. Before the hacking finally stopped, we moved the component websites to a different server, which enabled the main sla.org website to be taken off the blacklist. In May, we realized we needed another approach to hosting the component websites, and fast. We couldn't afford not to do business and to lose more registrations every day.

We already had a trusted partnership with Higher Logic Communities. We decided to move all our WordPress sites onto Higher Logic's microsite platform. With the annual conference coming up, we had an opportunity to get buy-in from everyone in person, including the technology advisory council, the board and the component groups. **Presentations were made, conversations were had, and demonstrations were given of the new sites.** The timing just worked out.

We gave security guidelines to volunteers, and explained that security updates would now be the responsibility of Higher Logic, so volunteers could focus on their role as subject matter experts, planning programs and releasing content specific to their area of interest. The Board approved this migration in July. Since then, the design and content template has been finalizing and the components started migratration in September.

The hacking crisis definitely made the process look different to what we expected. Previously, we envisioned making small updates and revisions over time that would trickle down from SLA.org to the component sites. Now it's happening in reverse, by modernizing the component website then making them all look consistent across the board and then working on the main site.

So far it's a win-win. We're unrolling some new technological functionalities that we haven't had access to before. Each volunteer-run unit will have more support. We're going to sell advertising on component website. We've been able to handle all this through the pre-existing relationship of trust we had built with the board, volunteers, components and Higher Logic as partners and collaborators. **If it wasn't for that, this implementation wouldn't be happening.**

From the Chat – How Negative Feedback Is Received

Accepting and reflecting on what your members say isn't time wasted.

"One way to mitigate [recurring problematic feedback from members] is to have a known methodology (doesn't have to be complicated) to handle research and other input."

— *Reggie Henry* —

"The mindsets to watch out for: "It's easier if we just figure this out ourselves." "I've worked here a while so I understand what all our members need."

— *Layla Masri* —

""We know, we don't have to ask them" mindset is so dangerous."

— *Meena Dayak* —

04

HOW TO IMPROVE TECHNOLOGY THE AGILE WAY

Is your organization too busy to make improvements or ready to commit to change?

BY HARRY ROTHMANN

When I think of organizations looking to make improvements to their technology, I always picture this cartoon: a team of cavemen pushing materials on a cart made of square wheels while two friends stand next to them waiting to install round wheels. The team struggling to push the cart refuses the offer of help, claiming that they're too busy to upgrade their cart. Of course, it takes more effort overall to use the older technology yet human nature will still resist the obvious improvement. So, how do you engage your staff to make improvements when everyone is too busy?

Every organization has a vocal minority that represents a certain area of the organization and wants to drive decision making. **The only way to get a fuller picture of the associations' needs is to do your research beyond listening to this minority.** Doing appropriate research and collecting data allows you to present facts about why these decisions are being made. It's a necessary investment, to gain that all important buy-in. If you're going to commit to moving the organization forward with technology, that move needs to be validated and a certain level of buy-in is necessary to move forward productively.

In 2018, **data is being collected everywhere.** There has been no other time in history when collecting data has been easier than it is today. Data is accessible and there are so many great business analytics tools available to make the most it. Overall it's a small investment to make, so you can dive deeper into that data and use it to your benefit.

With that said, **there is no replacement for person to person interaction.** You can't just rely on data. Coming from a history of working at a chapter- and affiliate-based association, I know that going to those different areas, chapters and affiliates to meet with them in their environment is an extremely effective form of user research. You're collecting data, in a very non-technological way, that can make a big difference to decisions at the headquarters level.

Having that user research helps start off iterative conversations. **No process is too small to rethink how you do things.** It doesn't have to be about building a whole new website. If you can rewire the everyday processes that take up your staff's time and energy over many different tasks and functions, overall your organization can benefit.

Not only will data help you start the process, it can help you again when you come to the implementation phase of your project. Leverage that data to re-educate yourself on what you've done right, and what you might have done wrong. Use your iterative steps as opportunities for corrective action.

The best example of this is how **Microsoft has evolved its releases of Microsoft Office.** Years ago, these releases were deliberate and years apart. Now with Office 365, these products get improved upon every other week, if not sooner. This new model of major technology companies and how they release software can often be fundamentally at odds with associations' funding and budgeting life cycles. Associations need to learn to adapt faster, and an iterative methodology can help us do that.

Several years ago at the Association of the US Army, we revamped our website. It was a healthy process. **The core methodology behind what we did was very agile.** We solicited a web design vendor separate from our web development vendor so that we could bring different experiences to those processes, and allow for these teams to work with us to create a better end product. What we found was the product we originally wanted evolved and ended up completely different. We launched the site, and continue making iterative improvements to this day. We've made a conscious decision to continue to invest in it financially, evolve the functionality and learn from what we have now to make it better for the future. Since our launch, **I've had numerous organizations use our site as a model for theirs.** I attribute this agile methodology and use of data as the key reasons why we've been successful.

The reality is it's a never-ending cycle. You can adapt your new AMS today, then start thinking about the next step tomorrow. Technology life cycles can be challenging and our day-to-day job responsibilities never end. The more you can use data and research to match those technology cycles internally, the more seamless your improvements can be. **If you do that, you can avoid being the team pushing the cart with square wheels.**

From the Chat - The Space for Improvement.

We should see potential for progress in everything we do.

"I can't way til the day when we all recognized that everything is a "work in process" - the change is the "thing"!"

— Reggie Henry —

"A small staff with resource challenges should set reasonable milestones, review progress at those points. Celebrate the success achieved, adjust where necessary, and most important, keep moving forward."

— Rick Rutherford —

"Copying can only get you so far. It needs to be a springboard for inspiration."

— Cecilia Sepp —

05

WHAT'S HIDING IN YOUR DAY-TO-DAY DATA?

The process of implementing new technology can be aided by easy-to-access data.

BY EMILY HENDERSHOT

Before you dive into implementing a new technology at your organization, be sure to look at what's going on in your day to day operations. Ask staff who work with volunteers or members: what issues are they facing? An easy way to track this is by logging the problems or issues raised from your member inbox. How are you collecting this type of data over time so when you do have a technology change, data on member pain points is readily available and you can pinpoint trends?

Use the data you already have in place, too. If there is a committee or a task force you work with on a regular basis for membership, use their knowledge to discuss member issues. If you have an annual meeting coming up, you can bring people together in person to discuss their views and needs. **There doesn't have to be an additional cost associated with getting folks together to have a conversation.**

And if that data uncovers uncomfortable truths, it's ultimately a positive thing for making data-driven decisions. Gathering up data from day-to-day operations will allow stakeholders to share in ways they may not always do. When we ask members their pain points directly, they talk about the first thing that comes to mind and we stop there, while there are many other levels of potential discussion we don't reach.

This kind of user research has to happen before ideation. You should have some ideas to work through from your stakeholders by the time you come to the table to brainstorm ideas about what's going to change. **Technology can level the playing field, so embrace this phase and be open to new ideas.** When you get to the ideation stage, include front-line staff since they will play a major role in communicating the change and answering questions. They will have valuable input and ideas as well.

One organization I worked with had money set aside for new technology and wanted to introduce Higher Logic communities. Based on years of experience with the group, the staff had an educated idea of how things should be set up for members to get the most value out of the platform, but the volunteers, members, and chapter leaders had other ideas we needed to consider. **We had to find a way to get everyone enthused about the project and win over the Board of Directors to make the investment.**

We spent the time and money to conduct a beta test over the course of three months, allowing volunteers and staff to experience the online community and give their feedback before committing to it full-time. This was our user research phase as we hosted trainings and feedback sessions while allowing volunteers and staff to work directly in the sandbox environment. When we brought the results of this to the board, they were happy with the engagement and more comfortable making a long-term investment.

As they say, "**Clarity comes from engagement, not thought.**" Talk to your users. Knowing their views about whatever process you're trying to streamline or automate will help you down the line, **when you implement solutions and need ambassadors to get the whole association on board.**
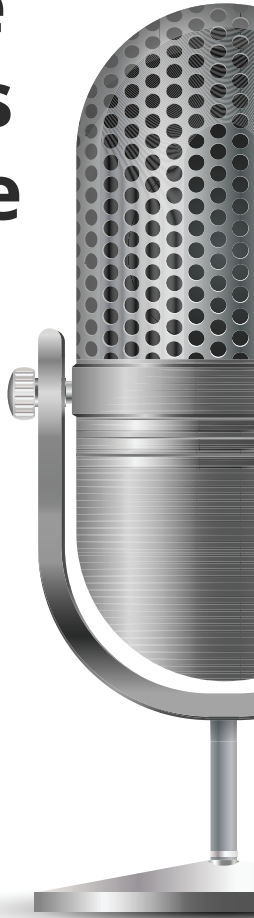
06

FURTHER RESOURCES

During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about human centered design. We've compiled them into a list here.

- [Network](#): The 501c/Association Mentoring Network (AMN) is a volunteer-founded and run network of professionals working in and serving the 501c/association community.

- [Monumental tool](#): Design Kit is all about human-centered design with fantastic resources and clearly defined methods including [immersion](#), [card sorting](#), [storyboarding](#), [defining success](#), and [measuring and evaluating.](#)

- [Report analysis](#): The Business Impact of Customer Experience Key, By Kerry Bodine and Moira Dorsey

- [Article](#): Amazon is the King of A/B testing by Wolfgang Bremer

- [UX research and consulting firm](#): Nielsen Norman Group

- [Report](#): Association Innovation Benchmark Study Conducted by Amanda Kaiser at Kaiser Insights LLC

- [Article](#): The Business Value of Design By Benedict Sheppard, Hugo Sarrazin, Garen Kouyoumjian, and Fabricio Dore

- [Design Consultant](#): Includes a free resource library for conversion-focused design.

- [Data Visualization Tool](#): Tableau makes databases and spreadsheets understandable to ordinary people.