

Keeping the 'Human' in Human Services: Tips for Implementing User-Centered Design

with Jessica Watson,
Marlene Cortés, and
Paul Schreiber

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12:00pm ET/11:00am CT/10:00am MT/9:00am PT

The Promise of Community Action

Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community and we are dedicated to helping people help themselves and each other.



Keeping the “Human” in Human Services

Tips for Implementing User-Centered Design

National Community Action Partnership
March 24, 2021



Empire Justice Center

Agenda for Webinar

01

About U.S. Digital
Response

02

Overview of
User-Centered
Design

03

Case Study:
Empire Justice
Center

04

Learnings +
Takeaways

05

Next Steps +
Q&A

About U.S. Digital Response

U.S. Digital Response connects governments and organizations with pro bono tech expertise to help better serve the public in times of crisis.

We're nonpartisan, fast, and free.

- **Founded in March 2020** by former U.S. Deputy CTOs and tech industry veterans who led federal open data policies and digital government strategy.
- USDR's team of pro bono experts work with government teams to understand their challenges and meet them where they are to help deliver critical services to the people who need them — all **within a few days to weeks**.
- Our **team has deep expertise** spanning engineering, data science, content strategy, design, logistics and supply chain, and disaster response.

We recruit excellent technologists and focus on what we can build for your communities, right away.

Highly-skilled Talent

Our volunteers and team members have decades of experience and have demonstrated impact in their current or previous roles.

Rapid Response

We respond to incoming partner requests within 24 hours. We are 100% demand driven.

Deliver Results

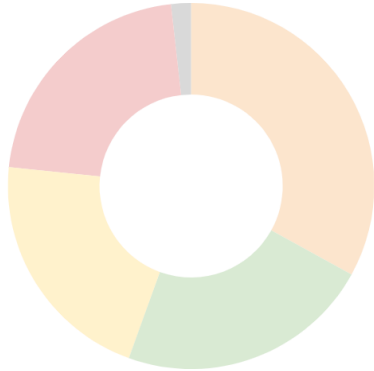
We focus on tech solutions, get systems up and running, and then **make sure partners have the tools and training you need** to operate them for the long term.

Scale What Works

We help you build from best practices in other states to meet the needs of your community.

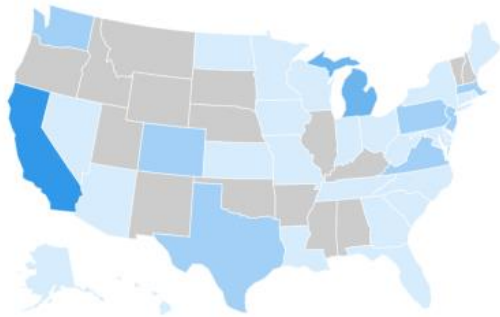
We have experience with your most pressing challenges.

290+ projects with governments and NGOs



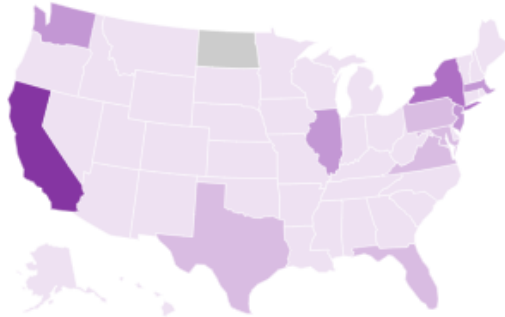
Project Types

36 states and territories across the country



Partner Locations

700+ volunteers deployed (from database of 6,700+)



Volunteer Database

We help support the critical needs of the public.

Data Mapping / Aggregation

Workplace Digitization

Small Business Assistance

Website Development

Streamlined Communications

Content Creation / Strategy

Volunteer Matching

Serving Vulnerable Populations

Food Assistance

Unemployment Insurance

Benefits Eligibility

Vaccination Preparedness

COVID-19 Testing Sites

Responsible Contact Tracing

Eviction and Housing Protection

Police Transparency

Federal Stimulus Tracking

Elections & Voting Support

Workshops & Consensus Building

And more...



User-Centered Design



What is user centered design?

Designing for the **people (users)**
who will use your product or service

A thought exercise on why this matters

Task:
Design the perfect wallet

A thought exercise on why this matters

Task:

Design the perfect wallet
for women who want a wallet they can take
with them when they go for a run that
remains hidden to passersby

What is user centered design in practice?

Research

It begins with research to get to know the users, their objectives and context

Empathy

It is based on empathy to put yourselves in the place of the users

Iteration

Uses an interactive process that allows for constant evaluation and improvement

How to incorporate into your process

Audience + Goals

Clearly define the target audience and users

Identify the intended goals of your work

User Experience Research

Understand the entire user experience

How, when, where, and why are people using this product or service?

Rely on user research and usability testing

Function + Design

Focus on making the website accessible, flexible and intuitive for your target audiences

Look at similar products and services that do this well

Iteration

Incorporate ongoing feedback, evaluations, and iterations into the design process

Look at data to see if the updates are working as expected

User-Centered Design in Action

Nearly all of USDR's 290+ projects have incorporated principles of user-centered design

How our partners incorporate user-centered design:

- A screener to help people determine if they qualify for unemployment benefits in New Jersey
- Informational websites to inform people about voting and elections and COVID-19 vaccines across the country
- Digital tools to help senior citizens locate nearby services in New York City
- A survey to point small business owners toward grant opportunities and financial assistance in New Jersey

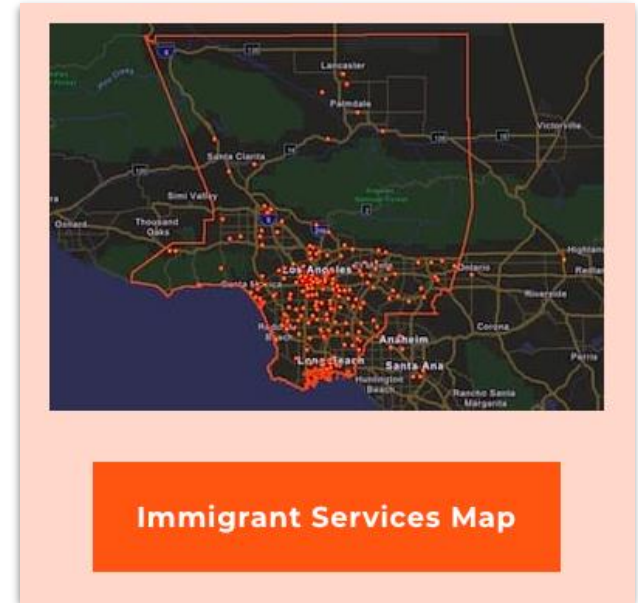
LA County Office of Immigrant Affairs

Example of U.S. Digital Response Projects

IMPACT

“The team that we were assigned, they’re just such thoughtful incredible people that bring all this private sector experience and we ended up with **a website product that’s way beyond what we could have ever imagined doing internally**. We bring subject matter expertise, but they brought to us design and functionality ideas that I certainly would’ve never conceived on my own.”

— Daniel Sharp, Chief of LA County’s Office of Immigrant Affairs

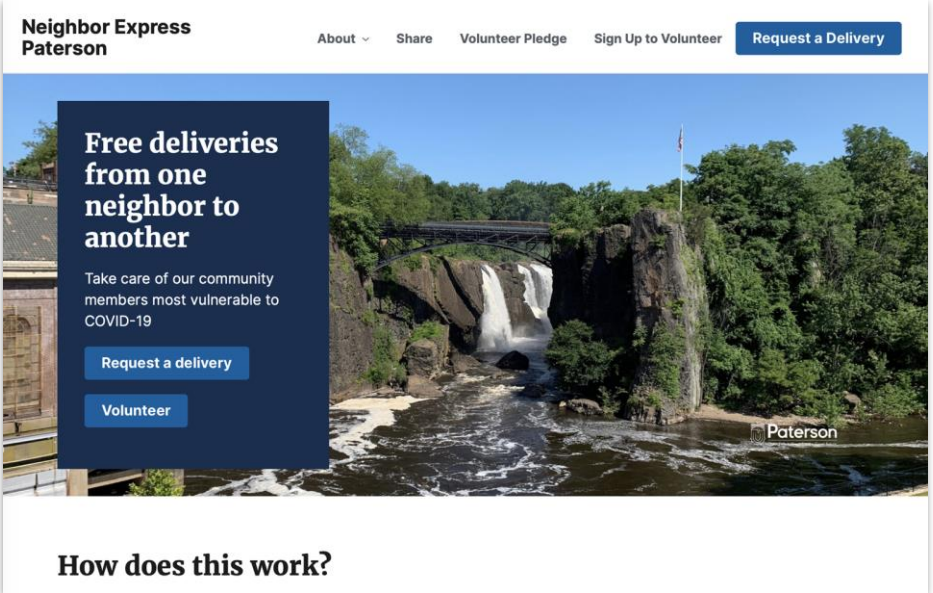


Neighbor Express

Example of U.S. Digital Response Projects

IMPACT

Within two months, **1,000+ meals** were delivered through Neighbor Express. The program received 137 requests, including 111 for regular Meals on Wheels deliveries, and 210 volunteers registered to assist with deliveries.



The screenshot displays the website for Neighbor Express Paterson. The header includes the organization's name, navigation links for 'About', 'Share', 'Volunteer Pledge', and 'Sign Up to Volunteer', and a prominent blue button labeled 'Request a Delivery'. The main content area features a scenic background image of a waterfall and a bridge. A dark blue overlay box contains the headline 'Free deliveries from one neighbor to another', a sub-headline 'Take care of our community members most vulnerable to COVID-19', and two buttons: 'Request a delivery' and 'Volunteer'. The Paterson logo is visible in the bottom right corner of the image area. Below the image, the text 'How does this work?' is displayed.



Case Study



Empire Justice Center - CASH Program

The Empire Justice Center is a New York-based nonprofit that works to achieve social and economic justice for people in the state who are poor, disabled or disenfranchised.

- CASH Program: Creating Assets, Savings and Hope
- Serves 5,000+ families per year
 - 80% of the people using the program's services are repeat clients
- The COVID-19 pandemic forced the Empire Justice Center to close its physical offices and shift everything to an online format
- The lack of in-person interactions made it difficult to bring that human-centered element of the services to life

User-centered practices in action (pre-COVID)

- One-on-one and group financial coaching to carefully discuss challenges and opportunities
- On-site assistance with opening accounts, applying for benefits, accessing job counseling services, etc. to make these offerings accessible to all
- Clear, simplified conversations and guidance for difficult topics and tasks around tax preparation, including documentation, eligibility
- Careful coordination of volunteer services with client support



How to incorporate into your process

Audience + Goals

Clearly define the target audience and users

Identify the intended goals of your work

User Experience Research

Understand the entire user experience

How, when, where, and why are people using this product or service?

Rely on user research and usability testing

Function + Design

Focus on making the website accessible, flexible and intuitive for your target audiences

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Iteration

Incorporate ongoing feedback, evaluations, and iterations into the design process

Look at data to see if the updates are working as expected

Clearly define the target audience and users

Audience + Goals

- **Clientele**
 - Low-income
 - Various types of paperwork to sort
 - Potentially confused or intimidated by taxes
 - Complexity of experience exacerbated by COVID



Clearly define the target audience and users

Audience + Goals

- **Staff / Volunteers**
 - Small nonprofit — passionate about serving population, but not focused on maintaining websites
 - Staff members can manage 100+ volunteers per tax season
 - Status quo is manual and tedious processes
 - Stressed and crunched for time while trying to run a free tax prep program in a world of COVID



Identify the intended goals of your work

Audience + Goals

- Improve the CASH program's website to better communicate with current and potential clients
- Incorporate aspects of in-person interactions into a fully remote services
- Update the Empire Justice Center team's processes to move away from manual, in-person workflows and adapt to the digital services



Free Tax Prep (VITA)

Get help with filing your taxes from
IRS Certified Volunteers

[LEARN MORE](#)



Financial Coaching

Get help with filing your taxes from
IRS Certified Volunteers

[LEARN MORE](#)



ROC Your Family's Future (RYFF)

Learn if you qualify for the Earned
Income Tax Credit

[LEARN MORE](#)



ROC Your Refund (RYR)

Learn how to use your tax refund to
build savings with a savings bond

[LEARN MORE](#)

Understand the entire user experience

User Experience Research

- **Website**
 - What is the editing / updating process on the back end of the site?
 - Are the language and tone on the site helpful and welcoming for users?
 - Is there a call to action or clear next steps for how users can access services and support?

- **Workflow**
 - What is the client journey?
 - Which staff members and volunteers are involved?
 - What are the systems that take them through the steps?
 - What are the pain points and opportunities we want to solve for?

Challenges and opportunities

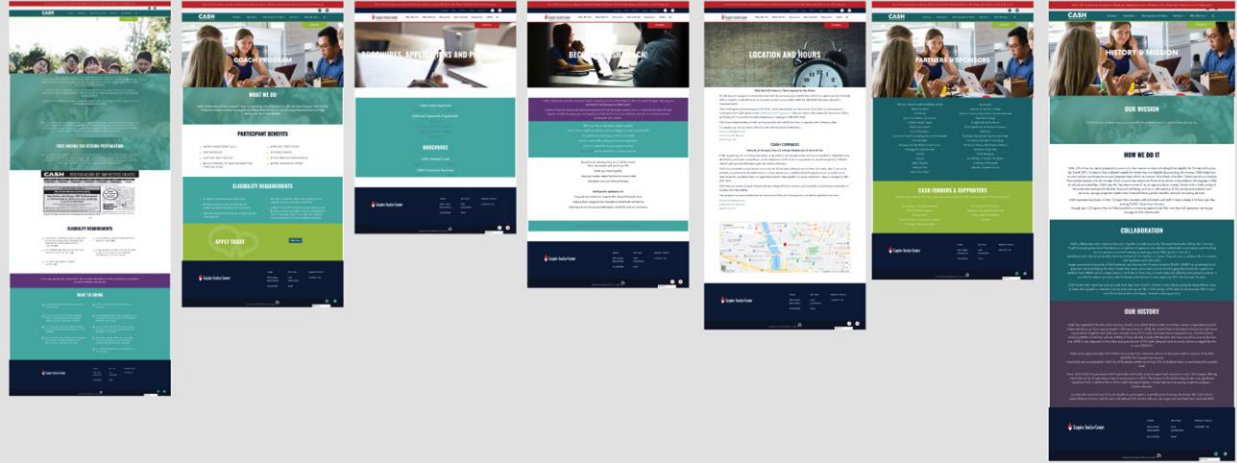
User Experience Research

- **Website**
 - Outdated, insecure software
 - Tool for translation
 - Ambiguous program descriptions
 - Complicated messaging and content
 - Inaccessible design
- **Workflow**
 - Manual collection / review / approval of documentation
 - Confusing administrative processes for staff / volunteers
 - Improve security and privacy measures
 - Make it possible to understand performance pipeline of activities

Rely on user research and collaborative planning

Function + Design

- Collaborative Design



Select accessible tools and incorporate usability testing

Function + Design

- **USDR provides impartial vendor recommendations to help our partners choose a critical path**
 - What is realistic regarding pricing and licensing?
 - If volunteers are doing most of the work, what access should they have to the system overall and what would the pricing implications for that be?
 - Focus on the core support team, but how can we add other people in to see certain aspects of the process?



Final Product

Iteration

HOW IT WORKS

We can help you prepare your taxes and connect you with a wide range of resources.



Online Tax Service

Service where you complete online forms, upload documents, and sign completed tax returns. No need to come in person.

ONLINE TAX SERVICE



In-Person Drop-off*

We are no longer taking appointments. Please do not call for an appointment.

**WE ARE NO LONGER
TAKING APPOINTMENTS**



Self-preparation

Prepare your own tax return online using [free tax software](#).

Due to COVID-related safety guidelines, in-person services are *not* available to the general public.

Final Product







[DONATE](#)

FREQUENTLY ASKED QUESTIONS

[COVID-19 Changes](#) • [Locations & Services](#) • [Eligibility & Requirements](#) • [Your tax return](#) • [Volunteers](#)

COVID-19 Changes

- What protective measures is CASH taking? 
- Are you accepting walk-ins? 
- Are there changes to how you deliver services this year? 
- Are there any changes to the type of returns you can prepare? 

Locations & Services

- Do you offer language interpretation services? 
- Where are you located? 

DONATE



ABOUT CASH

Free Tax Preparation Services

CASH is closed for the rest of the summer and will reopen after labor day.

Clients have up to 3 years to file return and there are no penalty if do not owe taxes. There will be a penalty if you do owe, but the client can still file. Please click the button below to be taken to the IRS website for more information.

[Click Here](#)

If you received a letter from IRS/NYS, we can not help you at this time. You can call a Taxpayer Advocate at 1-877-777-4778. For more information, click on the button below to go to the Taxpayer Advocate website.

[Click Here](#)

If you need to complete your taxes, you may do them yourself with online services. Please click the button below to see your options. [Click Here](#)

CASH [Creating Assets Savings and Hope] is a community coalition of 40-plus organizations, working together to improve life for low-income working families in Monroe County. We are regarded as a pioneer and national leader in the effort to provide financial services to low-income families. CASH was convened by the United Way of Greater Rochester in 2002. Since June 2007, CASH has been headquartered at Empire Justice Center.

← Before

After →

DONATE



OUR PROGRAMS

All of our programs are free and delivered through our team of highly-trained volunteers. Income eligibility requirements apply, so please check each program to see if you qualify.



Free Tax Prep (VITA)

Get help with filing your taxes from IRS Certified Volunteers.

[LEARN MORE](#)



Financial Coaching

Get help with filing your taxes from IRS Certified Volunteers.

[LEARN MORE](#)

ABOUT US

Creating Assets Savings and Hope (CASH) is a community coalition of over 40 organizations, working together to improve life for low-income working families in Monroe County.

We're a pioneer and national leader in the effort to provide financial services to low-income families. CASH was convened by the United Way of Greater Rochester in 2002. Since June 2007, CASH has been headquartered at Empire Justice Center.

[Learn more about us](#)

OUR IMPACT

10,000+

Families received help filing tax returns

\$16.9M

Total tax refunds

\$8.1M+

Total ETC benefits to working families



"The Department of Social Services told me I owed \$40,000 when I sold my home after getting help from CASH; we decreased the amount to \$20,000. The volunteers at CASH were a huge help!"

—Laurie, mother and homeowner

[Read more about our impact](#)

Project Impact

- In the course of updating the website, **3,000 coding errors** were fixed.
- The CASH program's new website is **clearer, more accessible**, and now works on mobile devices.
- The Empire Justice Center's organizational **website is now secure with a new hosting company** and is updated on regular basis.

191,000+

Families file tax returns

\$303M+

Total tax refunds

\$146M+

Total EITC benefits to working
families



“

When the USDR team discovered the security issues with our organizational website, they immediately contacted us and worked with our team to move our hosting to a new company. Paul was available at all hours to troubleshoot and assist our team with any issues or questions we had. Our site is now secure and updated because of working with USDR.

— Kristi Hughes, Vice President, Empire Justice Center



Real World Application

- Clients can still be home, take care of themselves and their families, and upload the required information for the CASH program
- The CASH program can follow CDC guidelines and still facilitate quick, convenient services via digital workflows
- The updated workflow keeps the CASH program staff connected virtually, allowing them to be productive and effective on the back-end and giving the clients a seamless experience on the front-end



Learnings & Takeaways



Key Learnings

- Identify the correct stakeholders and **establish clear feedback loops** for a collaborative and efficient process
- For your target audience, **identify the behaviors you're trying to drive** and the information you're trying to provide and structure your project to meet those needs
- Incorporate opportunities for **user research** at the beginning of the project and **user feedback** at the end of the project
- Use **design elements and content that are accessible** to all (messaging, colors, imagery, mobile, language, etc.)
- Consider **various options for a path forward**, but ensure a full understanding of capabilities, what you're actually getting, and what the services are offering

Take Action

Audience + Goals

User Experience
Research

Function + Design

Iteration

- Follow the “Audience → Research → Function → Iteration” model
- Utilize off-the-shelf tools
- Tap into existing sources of support (like USDR)

 Zendesk

 Google
Slides

 DocuSign

 Figma

 miro

 Airtable

 WORDPRESS

 Lucidchart



Connect with USDR



Get in touch with us. We can help.

USDR volunteers can work within defined or ambiguous scopes — we're here to help problem-solve together.

No issue is too big or too small.

Submit a request form to get started:

www.usdigitalresponse.org/request-help

Follow USDR:

Twitter - [@USDResponse](https://twitter.com/USDResponse)

LinkedIn - www.linkedin.com/company/usdr

Ask for Help

This form is for governments and government partners requesting help.

Who we are

U.S. Digital Response connects experienced, pro bono technologists with public servants and organizations responding to crisis. We're fast, and we're free.

Founded by former U.S. Deputy CTOs and seasoned tech industry veterans, USDR is a nonpartisan effort that deploys highly qualified professionals to support governments and NGOs in their efforts to deliver critical services to the people who need them — all within days to weeks. USDR is actively matching these mission-driven professionals to the needs of states, counties, cities, federal agencies and other organizations.

USDR volunteers can work within defined or ambiguous scopes — we're here to help problem-solve together. While we have a variety of replicable, "off-the-shelf" solutions, we are committed to partnering directly with governments on the specific issues facing your communities. No issue is too big or too small.

Use the following form to tell us about the challenge(s) you are facing, so we can understand how to help.

Email address *

[Next](#)



Questions?



Save The Date

Social Media/Digital Template Resources for CAAs

with Laura Vanden Bosch and
Anna VanWaardhuizen of
Strategic America

March 31, 2021
2:00 ET/1:00 CT/12:00 MT/11:00 PT

Save The Date

Adapting to Remote Processes: Tips for Improving Digitized Workflows

with Steve Barlow, Zane Selkirk,
Triana Kalmanoff, and Alex Allain

April 14, 2021

12:00 ET/11:00 CT/10:00 MT/9:00 PT

Save The Date

Disaster Recovery and Agency Continuity Planning

Resilience Toolkit and Webinar Series #3
with Melanie Lockwood Herman

April 15, 2021

2:00 ET/1:00 CT/12:00 MT/11:00 PT

Save The Date



Registration: bit.ly/equitysummittickets

For More Info

For more information or questions contact the HCCT CARES Project Team:

Aaron E. Wicks, PhD, CCAP, NCRT, VP Organizational Capacity Building,
awicks@communityactionpartnership.com

Lana Shope, CCAP, Project Director, HCCT CARES T/TA,
lshope@communityactionpartnership.com

Partnership website: www.communityactionpartnership.com

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