



**Women's Foundation of California**  
Summary of Discovery Phase

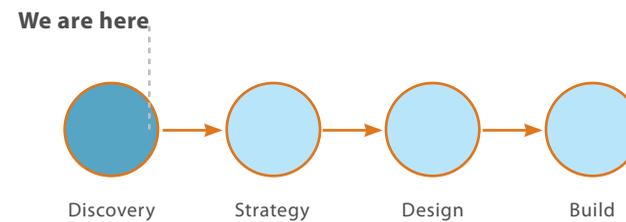


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Hot Studio conducted a User Experience Workshop with Women's Foundation staff to learn more about the foundation and its mission, its goals, its needs, and its audiences. We interviewed a total of 12 stakeholders representing staff and a cross-section of the key user types.

This document summarizes what we learned in those sessions. It includes content on what we heard, issues we identified, and recommendations for ideas to explore in the Strategy phase.





## What we did

During the first two weeks of the Discovery phase, we conducted the following activities:

1. [Led a project kickoff](#) with Women's Foundation stakeholders where we learned more details about the organization through a recap of project goals, identifying people's fears, uncertainties, and doubts (FUDs), as well as hopes and dreams with the website redesign.
2. [Conducted a user experience workshop](#) where we learned about the users of the site and their needs, and features that may meet those needs.
3. [Reviewed existing research and documentation](#), including the Women's Foundation 2020 Vision document and Totem's brand audit and recommendations, grant partner transcripts, and final brand presentation.
4. [Interviewed individual stakeholders](#) from each of the primary user groups to learn more about their specific goals, needs, and perspectives.

## What we learned

The activities of the week provided us with insight into the goals of the project:

1. The new site needs to more [accurately reflect the true identity of the Women's Foundation](#), including the nature of your belief in systemic change, its place as an authority on women's and girls' issues, its role as a networking hub for legislators, researchers, advocates, donors, program participants, and grant partners.
2. [Sharing personal success stories by role/user group](#) will inspire users and make them feel a personal connection through their participation with the Women's Foundation.
3. The site needs to [reduce the amount of block text content, provide graphic content to express complex ideas, and offer more calls to action](#) to better engage users and keep them coming back.
4. Providing [regional-specific information](#) will allow users to stay current with the type of offerings that most interest them and allow them to connect locally.
5. There is a [large, untapped younger donor/contributor base](#) to be addressed.
6. [Site architecture changes will support fundraising efforts](#) by aiming at surfacing important information and providing fundraisers with a tool that matches their narrative.

## What we're going to do

Based on what we have learned, we will proceed via the following tasks in the Strategy phase:

1. [Identify the features](#) (content and functionality) that will meet the Women's Foundation's goals and the users' needs.
2. [Prioritize features](#) by balancing user needs, the Women's Foundation's goals, time, resources, and technical feasibility.
3. [Identify issues](#) or potential roadblocks that should be addressed during the project.
4. [Develop initial schematics](#) of the user interface templates to explore approaches to a new site architecture and feature implementation.
5. [Develop high-level current and proposed site maps](#) to illustrate strategic site architecture recommendations.
6. [Develop two phased project plan options](#) for the site redesign, to allow the Women's Foundation a choice of ways to proceed based on available resources and schedule.



Create and drive California 2020 Vision by **building bridges across issue, sector, strategy, and geography**

**Invest in and strengthen leadership and organizations** to build a progressive systemic change movement that benefits all communities in California

**Create and implement policies** that advance the health, economic prosperity, safety, and **leadership** of women and girls in our communities

**Be recognized as the leading authority on women's and girls' issues** in California

**Marshall the necessary resources** to support this work

## **We spoke with key Women's Foundation stakeholders in our Kickoff meeting:**

- Judy Patrick, President and CEO
- Cathy Schreiber, Director of Communications and Development
- Surina Khan, VP of Programs
- Amanda Cassel, Program Officer
- Nicole DeCouzon McMorrow, Associate, Development and Communications
- Suzan Briganti, Totem Media



One of the intents behind the kickoff and the user experience workshop is to get everyone to talk about the goals for the website and to come up with criteria for determining the success of the project. The table on the right distills the Women's Foundation's goals, hopes and dreams for the project. The column on the left describes the high level goal, the column on the right describes the goal in more detail or how that goal may be met.

These goals, along with the user needs on the next page, will guide the rest of the project. The combination of these will allow us to prioritize content and functionality, and weigh them against technical, resource, and time constraints.

***"We want to be the AI Gore of women's issues."  
— Judy, President and CEO***

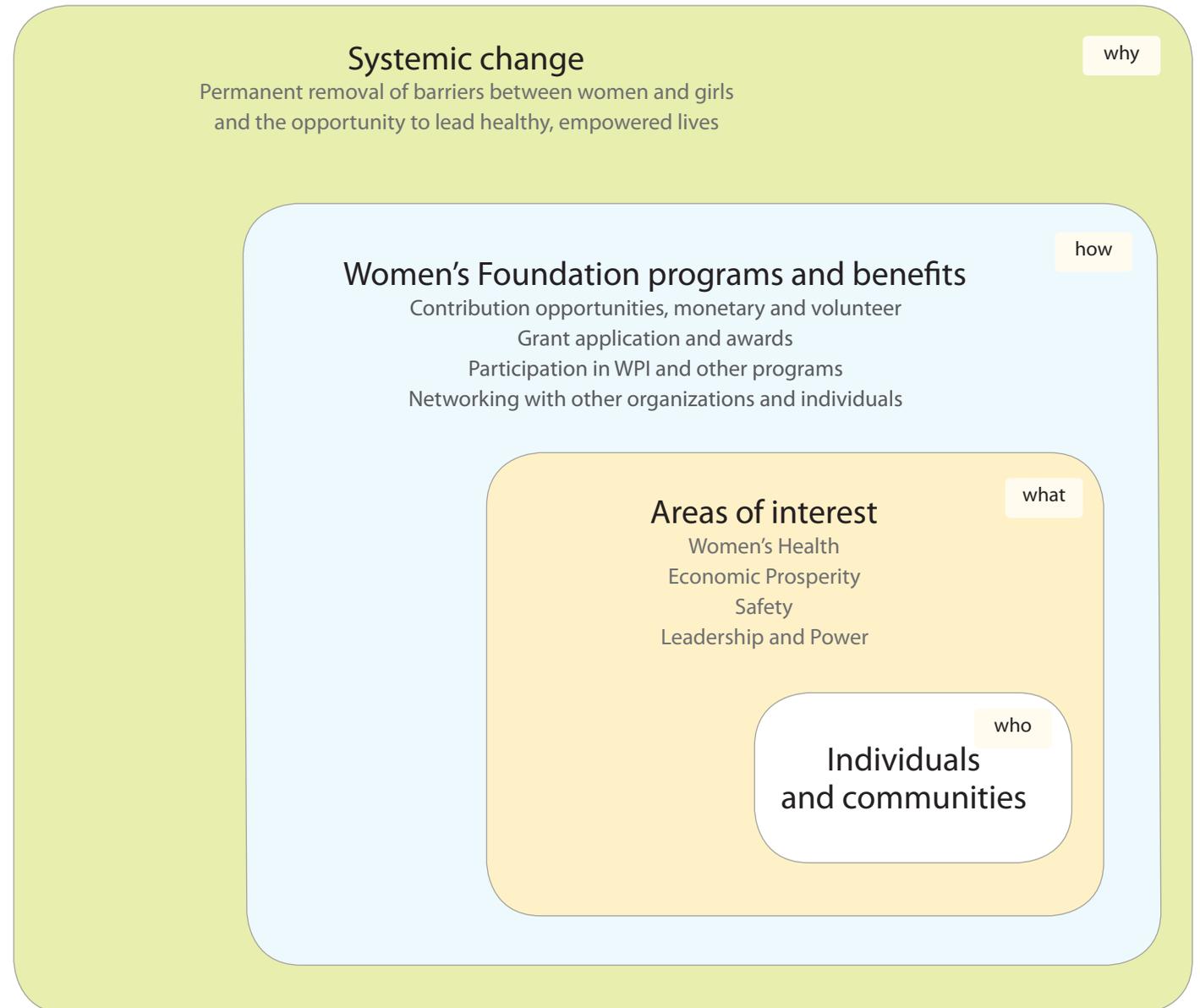
<b>Better communicate the full breadth of Women's Foundation's work and participation opportunities in the areas of health, economic prosperity, safety, and women's leadership</b>	<ul style="list-style-type: none"><li>• Connect the dots between areas of interest</li><li>• Add personal and organizational success stories to show donors and potential donors the effect of their donations</li><li>• Grow and excite the donor/volunteer base</li><li>• Ensure full staff commitment to creating internal systems to create and manage site content</li></ul>
<b>Be the central hub for all issues concerning women and girls</b>	<ul style="list-style-type: none"><li>• Capitalize on the Women's Foundation's reputation for framing issues in a legitimate, digestible, non-partisan style</li><li>• Provide easily findable information in the Women's Foundation's core topic areas</li><li>• Provide more networking opportunities for all user types</li></ul>
<b>Identify and present clear differentiators between the Women's Foundation and competitor organizations</b>	<ul style="list-style-type: none"><li>• Present a simple model describing systemic change and tie each arm of the Women's Foundation to that model</li><li>• Explore interactive &amp; dynamic stories &amp; communication tools</li><li>• Emphasize the Women's Foundation's focus on leadership development</li></ul>
<b>Present the most relevant information to each user by aligning content choices and interactions to specific user types and scenarios</b>	<ul style="list-style-type: none"><li>• Provide wayfinding by regions and areas of interest</li><li>• Provide site interactivity on par with savvy users' expectations</li><li>• Provided task-based focus to content organization</li></ul>
<b>Redesign the site to support the new branding efforts and align with print design</b>	<ul style="list-style-type: none"><li>• Ensure visual consistency in logos, brand colors, and fonts to ensure recognition from print to web and back</li><li>• Create visual imagery for cross-media applications</li><li>• Employ consistent messaging, taglines, narratives, etc.</li></ul>



A key challenge is to quickly and effectively communicate what makes the Women's Foundation different from other foundations: your commitment to creating systemic change.

The diagram at right is a rough sketch of the multiple layers of Women's Foundation's breadth of offerings and their interdependence in creating systemic change.

***"We don't teach women how to fish. We cut down the fences around the lake."  
— Gayle Tauber, Board Member***





Below are the primary and secondary user groups identified by the Women's Foundation. The following pages will illustrate their individual needs and characteristics.

## Universal needs across user groups

- State of CA issues overview and reports
- Who the Women's Foundation is: board, executive, and staff profiles
- Communication tools among and between user groups
- Contact info for specific assistance
- Focused areas of interest to gather, meet, discuss
- Location-based dynamic interaction, stats, and indicators

### Primary users

#### Donors

This group includes those who make donations of their own money either individually or as part of a donor circle, volunteer their time or expertise, and professional advisors in charge of their clients' giving choices. One of the main goals of this project is to grow this user group.

#### Advocates

This group is primarily made up of people working or volunteering with community advocacy groups focusing in a single interest area and/or region. One of the main goals of this project is to help these users network with one another better.

#### Policymakers

This group includes state and local legislators and their legislative staffs; community-based and corporate lobbyists; Sacramento interns and other college students; policy analysts with private think tanks and from university-based research institutions.

### Secondary users

#### Staff

Various Women's Foundation staff members currently use the site as a reference tool for accessing content, as well as maintaining content for it.

#### Press

Journalists and bloggers are currently an underserved user group who, if provided with targeted content areas, could be important publicity sources.

#### Funding Colleagues

These users are from other grant-providing organizations, occasionally partnering with the Women's Foundation for events, and occasionally competing with them for donations.



Our research verified that the Women’s Foundation already has a solid understanding of who their current users are, and revealed opportunities for growing the donor and volunteer base.

**Key overall takeaways:**

**The current definition of “donor” does not address all the contributors to the Women’s Foundation**

The term “donor” is resonant only for those who give monetary donations. It does not address the volunteers who contribute time and energy to Women’s Foundation events or donate their expertise as part of any of the Women’s Foundation’s initiatives.

The Women’s Foundation is in a good position to welcome these other contributors, especially while they are young, to develop strong loyalty that will maintain until they grow into financial positions where they can become monetary supporters of the Women’s Foundation.

**Contributors are inspired by other contributors**

The value-add for contributing to the Women’s Foundation is being able to consider oneself part of an effective, larger movement. Hearing about other contributors experiences, seeing recognition for their efforts, and giving them the tools to find each other will do far more to grow the Women’s Foundation’s base than direct outreach alone. Sharing these stories are even more valuable to some potential contributors than the case studies of efforts and results from the beneficiaries perspective.

Sub-groups	Who they are	Demographics	Want they want
<b>Direct Donors</b>	Board members Donor circles Donor-advised funds	<ul style="list-style-type: none"> <li>White</li> <li>45-65 years old</li> <li>Middle-high income</li> <li>Earned wealth, rather than inherited</li> <li>Women</li> <li>Reside in city centers</li> <li>\$500 biggest base; a few &gt;\$1000</li> <li>Skew toward progressive politic</li> <li>Highly educated (36% adv. degrees)</li> </ul>	<ul style="list-style-type: none"> <li>Information about women’s and girls’ issues to validate their choice to donate</li> <li>To feel they are making a difference through stories of direct impact, “ROI”</li> <li>Tools for fundraising, event announcements, ability to post own events</li> <li>Recognition for their efforts</li> <li>Social and/or professional networking opportunities with others who share interest in social justice for women and girls</li> </ul>
<b>Potentials</b>	The same as above, plus other individuals interested in women’s and girl’s issues	Same as above, plus the currently untapped: <ul style="list-style-type: none"> <li>Multi-racial</li> <li>18-45</li> <li>All income levels</li> <li>Women and men</li> <li>\$50-200 base and</li> <li>non-monetary contributors</li> </ul>	Same as Direct Donors, plus: <ul style="list-style-type: none"> <li>Volunteer opportunities, esp. where they can contribute professional skills</li> <li>Activism-oriented calls to action</li> <li>Stories from other contributors to validate their choice to contribute</li> </ul>
<b>Proxies</b>	Estate-planning attorneys CPAs and money managers Institutional donors	n/a  These are wealth management advisors for individuals of means, charitable trusts, and corporate giving budgets	Same as Direct Donors, plus: <ul style="list-style-type: none"> <li>Reference materials for clients</li> <li>ROI information</li> <li>To be accessible to the donor base for client generation</li> </ul>

Our research verified that the Women’s Foundation already has a solid understanding of who their current users are, and have accurately assessed the need for community advocates to connect.

**Key overall takeaways:**

Advocates are responding to the call for systemic change, and want more support to organize beyond their main interest area

The effectiveness of taking a systemic approach to change has been validated in the eyes of the advocates, even if only theoretically, and they are wanting and willing to weave their efforts into a larger tapestry of organizational effort. There is a desire to use social networking tools, but very few advocacy groups have the time or resources to develop a social technology plan.

**Advocates could be a source for site content**

The larger Women’s Foundation community has enormous potential for providing fresh, engaging content, which could reduce the burden on the Women’s Foundation to create dynamic homepage content, and shift some of it to an editorial role.

***“We have the ability to provide organizations with a paragraph, bullet points...we’d love to do that.”***  
**— Perla Rodriguez, Dir. of Comm., PPIC**

Sub-groups	Who they are	Demographics	Want they want
<b>Active Advocates</b>	Community-based advocates Current or past grant partners Individual activists	<ul style="list-style-type: none"> <li>• People of color/immigrants</li> <li>• Younger 20-30</li> <li>• Lower income</li> <li>• Very hardworking</li> <li>• Wide range of tech exposure/skill</li> <li>• Some individual activists</li> <li>• Bay Area, LA, Central Valley</li> <li>• Women</li> <li>• Orgs of all sizes and outreach levels</li> <li>• More politicized progressive/left</li> <li>• Highly educated domain experts</li> </ul>	<ul style="list-style-type: none"> <li>• Women’s Foundation analysis of women’s and girls’ issues; statistics and data</li> <li>• Professional networking opportunities, esp. with other advocacy groups in their region and related to their area of expertise</li> <li>• To feel they are part of a larger movement, stories of direct impact in their interest area</li> <li>• Tools, training, best practices for organizing</li> <li>• Resource directories, references to specialized services and other funding opportunities</li> <li>• Opps to publicly share their domain knowledge</li> </ul>
<b>Grant Seekers</b>	Community-based advocates and organizations	Same as Active Advocates	Same as for Active Advocates, plus: <ul style="list-style-type: none"> <li>• Grant application instructions and forms</li> <li>• Information on and access to past grant partners, to help assess what types of efforts have won grants in the past</li> </ul>
<b>WPI Participants</b>	Professionals holding various positions in California non-profits	Same as Active Advocates	Same as for Active Advocates, plus: <ul style="list-style-type: none"> <li>• Alumni contact with other fellows/graduates</li> <li>• Networking with policymakers and other contacts in Sacramento</li> </ul>

# User Profiles - Policymakers



While a portion of policymakers and influencers are familiar with the Women’s Foundation, this group is very small and there is significant opportunity to reach out to a far larger constituency of policy analysts and others who could be using the Women’s Foundation as a resource for their efforts.

**Key overall takeaways:**

The Women’s Foundation’s offerings are still unfamiliar to some policymakers

Once introduced to the Women’s Foundation’s offerings, policymakers with concern for women’s and girls’ issues will come back to get the Women’s Foundation’s perspective on issues and legislation, and event information. But there needs to be a greater outreach to create awareness of the breadth content for them.

Sub-groups	Who they are	Demographics	Want they want
<b>Legislative Staffers</b>	State policy analysts  Primary Women’s Foundation target in this user group	<ul style="list-style-type: none"> <li>• Racially diverse, slight white majority</li> <li>• Sacramento-based, deep knowledge</li> <li>• Long-term</li> <li>• More knowledge on specific issues</li> <li>• 20s-40s</li> <li>• Educated</li> </ul>	<ul style="list-style-type: none"> <li>• Data, stats, briefs they can use to inform their analyses</li> <li>• Policy recommendations and Women’s Foundation’s POV on issues</li> <li>• Issue-based perspectives grounded in other organization’s POVs</li> </ul>
<b>Legislators</b>	Elected officials	<ul style="list-style-type: none"> <li>• 60% white, 40% wide ethnic variety</li> <li>• 75% male, 40-60 years old</li> <li>• Various levels of political experience; subject to term limits</li> <li>• Mainly located in Sacramento</li> <li>• Well-educated</li> <li>• Wide range of political values, but Women’s Foundation partners mostly with Democrat</li> </ul>	Similar to Legislative Staffers, plus : <ul style="list-style-type: none"> <li>• Recognition for their efforts</li> <li>• More exec summary info, “briefer” briefs</li> </ul>
<b>Lobbyists</b>	Long-term believers in causes  Guns for hire	Similar to Legislators, but: <ul style="list-style-type: none"> <li>• More women</li> <li>• More politically moderate</li> <li>• Mix of for-profit and non-profit</li> </ul>	Same as Legislative Staffers
<b>Research Institutions</b>	University students/ departments  Think tank researchers /analysts	Students: <ul style="list-style-type: none"> <li>• 20s, wide demographics</li> <li>• Interested in social justice causes</li> <li>• Progressive; mostly from Bay Area and LA</li> </ul> Think tank policy analysts not always CA based; privately funded	Same as Legislative Staffers, plus: <ul style="list-style-type: none"> <li>• Dissemination vehicles for their own research; access to the Women’s Foundation’s audience</li> </ul>

# User Profiles - Secondary Users



While secondary in terms of site focus, these are still important users, and opportunities to provide them targeted content and/or site area should be explored.

Sub-groups	Who they are	Demographics	Want they want
<b>Women's Foundation Staff</b>	All staff, but especially those with site content or maintenance responsibilities  Board members	n/a	<ul style="list-style-type: none"> <li>• To better support their colleagues and users</li> <li>• A dynamic site that feels modern and engaging</li> <li>• Internal systems for gathering info, capturing accomplishments, and producing site content</li> <li>• To be able to manage content without extensive technical skills; page templates for consistent content display</li> <li>• Secure area for internal content</li> <li>• A strategic social networking technology policy</li> <li>• Easy online donation processing</li> </ul>
<b>Press</b>	Mostly print media journalists  Untapped blogger and website journalists audience	n/a	<ul style="list-style-type: none"> <li>• Interview leads (Women's Foundation staff, grant partners)</li> <li>• Press releases, press kits</li> <li>• Story angles</li> <li>• Philanthropic research stories</li> <li>• Other information on resources and orgs</li> </ul>
<b>Funding Colleagues</b>	Other women's foundations  Affinity groups  Funders' networks	n/a	<ul style="list-style-type: none"> <li>• Knowledge management</li> <li>• Grant information</li> <li>• Information about CA issues and other groups</li> </ul>



## Overall project scope

These are the project priorities for the site redesign we'll focus on for this project:

1. Site migration and framework (wireframes)
2. Strategy document
3. Assess next phase of work after New Year's

## Next steps: Strategy phase

The focus of the Strategy phase is to create a strategic vision and framework that will guide the design process. (Specific page designs will be completed during the Design phase). We are currently in week 3 of Strategy.

Strategy work includes:

1. Site navigation: identify high-level user flows and evaluate how to rework the site map and navigation framework
2. Scenario and user flow development
3. Wireframing and screen flow development to address and illustrate some of the core content and features in context of the user needs and scenarios identified during Discovery
4. Feature prioritization: determine which features and content we'll be developing/reworking based on a culmination of user needs, business goals, technical feasibility, and future maintenance. This will become the foundation for the site roadmap: what to build and publish, and when to do it.
5. Design engineering workshop
6. Strategy document that outlines design recommendations based on research, Discovery phase learnings, and technical discussion.
7. Re-scope of remaining project work (Design and Build phases, including CMS selection, build and implementation)