Usability Testing Ballots

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Objectives

❖ Learn how to

– Conduct a usability test
– Understand what happened in the test
– Turn that into improved ballots
What we’ll cover

- Intro to usability testing
- Methodology and planning
- Tips and techniques
- The LEO Kit
Introduction to Usability Testing
What is “usable”? 

- For you, it’s whether the ballot can be counted
- For voters, it’s whether they are able to vote as they intend to
What is a usability test?

- Observe real people using something (rather than asking them about it)
- Measure how easy something is to use to accomplish a task: Can voters vote without becoming confused and making mistakes?
- Inform design: Where can we prevent mistakes? How can we help voters recover from mistakes?
What is usability testing?

- Controlled, semi-realistic
- Explore questions with measurable answers
- Confirm or challenge assumptions
- Help choose between design alternatives
Demonstration

- Volunteer for voter
- Everyone else observe the session
- I’ll be moderator, doing what you should do if you were conducting usability testing
Demonstration

- Voter – assume
  - You haven’t done much homework on what the measures are
  - You have a vague feeling about how you want to vote
  - You want to be sure to vote on the measure about education technology
Demonstration

- Observers, please note
  - What the voter does
  - What the voter says
CITY OF WASHOUGAL
PROPOSITION NO. 1
NEW CIVIC CAMPUS
GENERAL OBLIGATION BONDS - $7,500,000

The City Council of the City of Washougal adopted Ordinance No. 1583, concerning a proposition for bonds. This proposition authorizes the City to construct a new Civic Campus including Public Library, Senior Room, Community Room, and a City Hall, to issue $7,500,000 of general obligation bonds maturing within a maximum term of 20 years to finance such improvements, and to levy property taxes annually in excess of regular property taxes necessary to repay such bonds, all as provided in Ordinance No. 1583. Should this proposition be approved?

APPROVED?
REJECTED?
Review

- Participant: what was it like?
- Moderator: what questions do you have about moderating?
- Observer: what did you see?
Review

- How well did that go?
- What did you observe the voter doing?
- What problems did the voter have?
- How did the moderator behave?
Goals of testing

- Identify problems in design that could lead to residual votes or fall-off
- Even the best ballot design can introduce unpredictable problems
- Make it easier to carry out the voter’s intent
- Make it more likely that the voter’s intent is carried out
- Only good news about the election
Things to think about

- Know why you’re testing
- Make sure the right people are on board
- Find the right participants
- Frame the voting task in a voter-centered way
- Facilitate curiously, objectively
- Know what you want to do with the results
- Be willing to iterate designs
Why not do this in a group?

- In focus groups, you get
  - Preferences
  - Opinions
  - Group consensus

- In a usability test, you get
  - Individual behavior and performance
  - What happened, as well as why
When to test

- Something about the situation has changed since the last time you did it
- You have a good idea of what’s going to be on the ballot
- Some event happens that would change the layout
Who to include

- Voters: 12-15 or 5-7, one at a time
- Moderator
- Observer/note-taker
What you need

- A ballot or other election materials
- A polling place or other situation
- Some way to take notes
- Recording, or no recording?
Method

- Prepare copies of what you want to test
- Recruit voters to try out the materials
- **One at a time, have a voter try to use the materials**
- Observe what happens, note what voters say
- **When the voter is done voting, ask the voter to step through what he/she did, where there were questions, what was confusing**
- Over several voters, look for patterns in the problems and questions they had
Break!
Moderating

- Impartial, unbiased, observing
- No teaching!
- Listen and watch
- Open-ended questions: Why? How? What were you doing?
Moderator roles

- **Flight attendant**
  - Ensuring safety and comfort

- **Sportscaster**
  - Play-by-play
  - Maximizing information flow to observer/note taker

- **Scientist**
  - Planning
  - Maintaining objectivity
  - Managing data
  - Producing reports
  - Iterating design
We’re not testing you – your being here helps us create a better ballot

You can stop if it’s uncomfortable

Your involvement will be confidential

Problems you have with using the ballot are not your fault

If you get stuck or confused, say so

Treat me like a poll worker
Maximizing information

- If the voter says, “hmmm” or “oops” or “I wonder…”
  - Say, “What questions do you have right now?”
- If the voter is silent for 10 or 20 seconds (count!)
  - Say, “What are you thinking?”
- If the voter stops because she thinks she’s done or she’s stuck (and you think there’s a problem)
  - Summarize what you saw her do
  - Ask what she will do next
Think aloud or review

- Consider asking people to “think aloud” as they vote
  - What they’re doing
  - Why they’re doing it

- Review after voting
  - Ask the voter to walk you through, step-by-step what they did and why
  - Use the ballot as a guide for the discussion
  - Ask what was confusing or frustrating
  - You may want to ask voters to do specific things now and comment
Forming task scenarios

- Open-ended
- Separate the results from the process
  - You want them to under vote
  - They want to vote for as many commissioners as they’re comfortable with
Task examples

- You usually vote for everyone in the Yellow party. Vote for all the people in that party at one time.
- For State Senator, instead of the Yellow party person, you want the Orange party person. Make sure your vote for State Senator is for the Orange party person.
Task examples

- For now, you decide not to vote for Water Commissioners.
- You don’t have a strong feeling about the state Supreme Court justices, so you decide to allow them to stay in office.
- When you are ready, finish voting as you really would in a real election.
Taking notes

 Didn't read the instructions. Did he see them?

 Only voted for 2. Why?

 Wrote in a qualified candidate but didn’t connect the arrow.
Test a ballot

- Break up into groups
- Each person takes a role: participant, moderator, observer
Discussion

- What kinds of things happened?
- What did your voter do?
- What did your voter say?
What are the results?

- Base your results on what voters did
  - All voters said that the language of the measures was complex and difficult to understand
  - Some voters said that the type was too small
  - Several voters marked their selections with checkmarks or Xs rather than filling in the box
  - Only a few of the voters read the instructions on the ballot
  - Voters expected the numbers to designate steps they should take
Analyzing data

- Make sure the problems you identify relate back to the reasons you did the test
- Count errors
- Look at where in the ballot the errors occurred
- Look at the types of errors
- If you have a lot of usability problems put them on stickies and sort them
- Compare to the next election cycle
Encourage reporting for
- Sunshine
- Public relations
- Demonstration of improvement and progress
The Kit

- Usability Testing Ballots: What you need to know
- Session script
- Report template
Summary

- Usability test your ballots
- Understand the what happened in the test
- Turn that into improved ballots
Resources

- Usability Professionals’ Association: [www.upassoc.org](http://www.upassoc.org)
- *A Practical Guide to Usability Testing* by Joe Dumas and Janice Redish
- *Handbook of Usability Testing* by Jeff Rubin
- My blog about usability testing at [http://usabilitytestinghowto.blogspot.com/](http://usabilitytestinghowto.blogspot.com/)
Contact me for coaching, questions, or testing

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