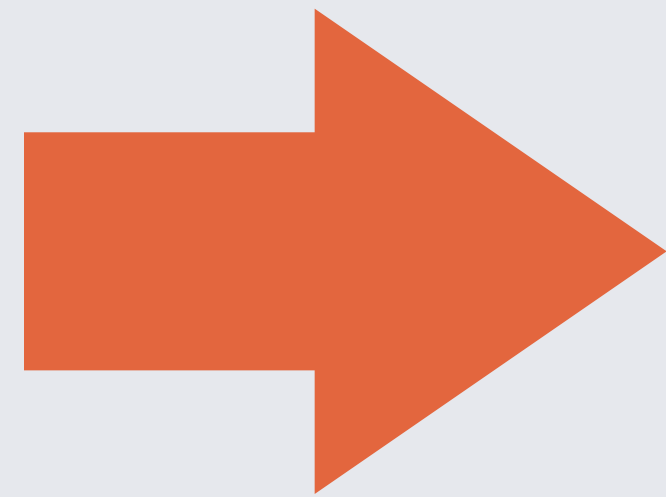


Summa UX Research Phase 2 Overview & Findings

Produced By: Precious Elam, UX Researcher



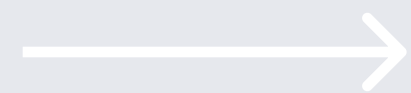
Project Overview



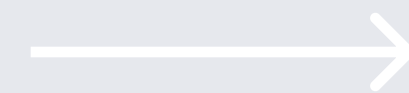
- **Objective:** Evaluate redesigned mock-ups for SUMMA to assess clarity, usability, trust, and motivation for both parents (fund creators) and non-parents (potential donors)
- **Participants:** 10 total (5 parents/caregivers, 5 donors/non-parents)
- **Method:** Usability walkthrough with feedback on 6 slides

Timeline

Recruitment

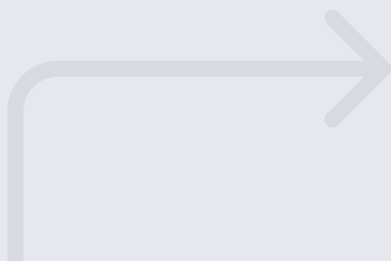


Testing



Synthesis

User Interview Overview

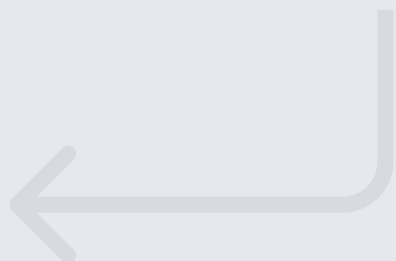


Completed 10 User Interviews

5 Parents/ Caregivers



5 Funders/Donors



Testing Approach



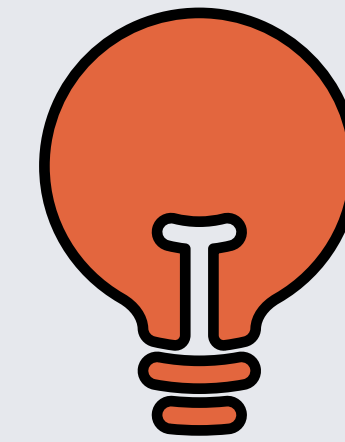
Approach

- Scenario-based tasks: homepage impressions, fund setup, sharing, donation flow, and social posts
- Tested both perspectives: parents/caregivers (fund creators) and non-parents (donors)



Format

- Moderated, remote sessions (30–45 mins each)
- 10 participants (5 parents/caregivers, 5 donors)
- Prototype walkthrough of early SUMMA designs



Output

- Task-by-task user feedback
- Thematic insights (clarity, trust, usability, motivation)
- Actionable design recommendations

Who We Tested With : User Persona's



Parents & Caregivers (Fund Creators)

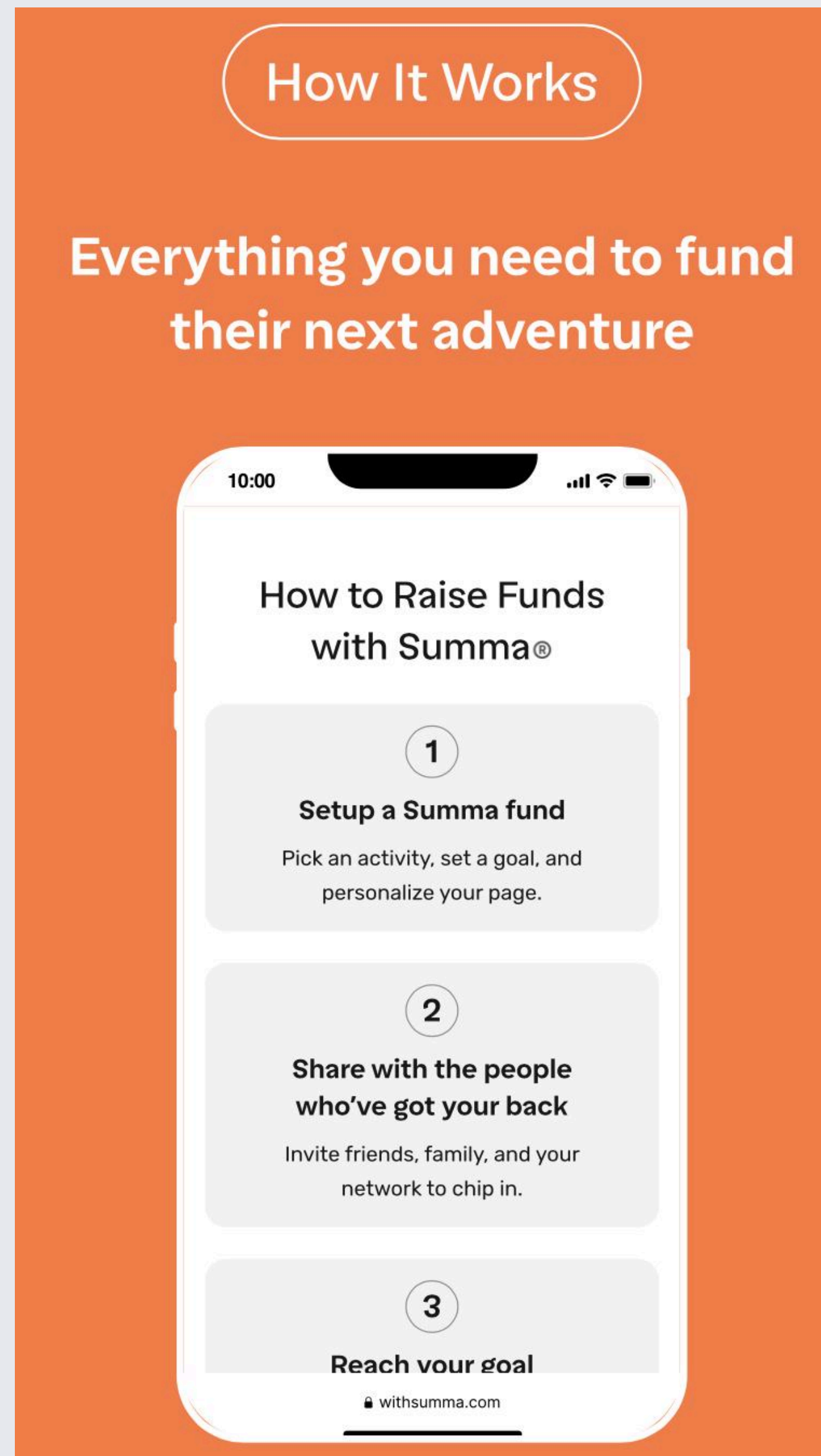
- Enroll children in extracurricular activities (sports, arts, camps).
- Face financial barriers and look for easier ways to fund opportunities.
- Want a simple, guided process for creating a fund and sharing updates.



Non-Parents / Donors (Supporters)

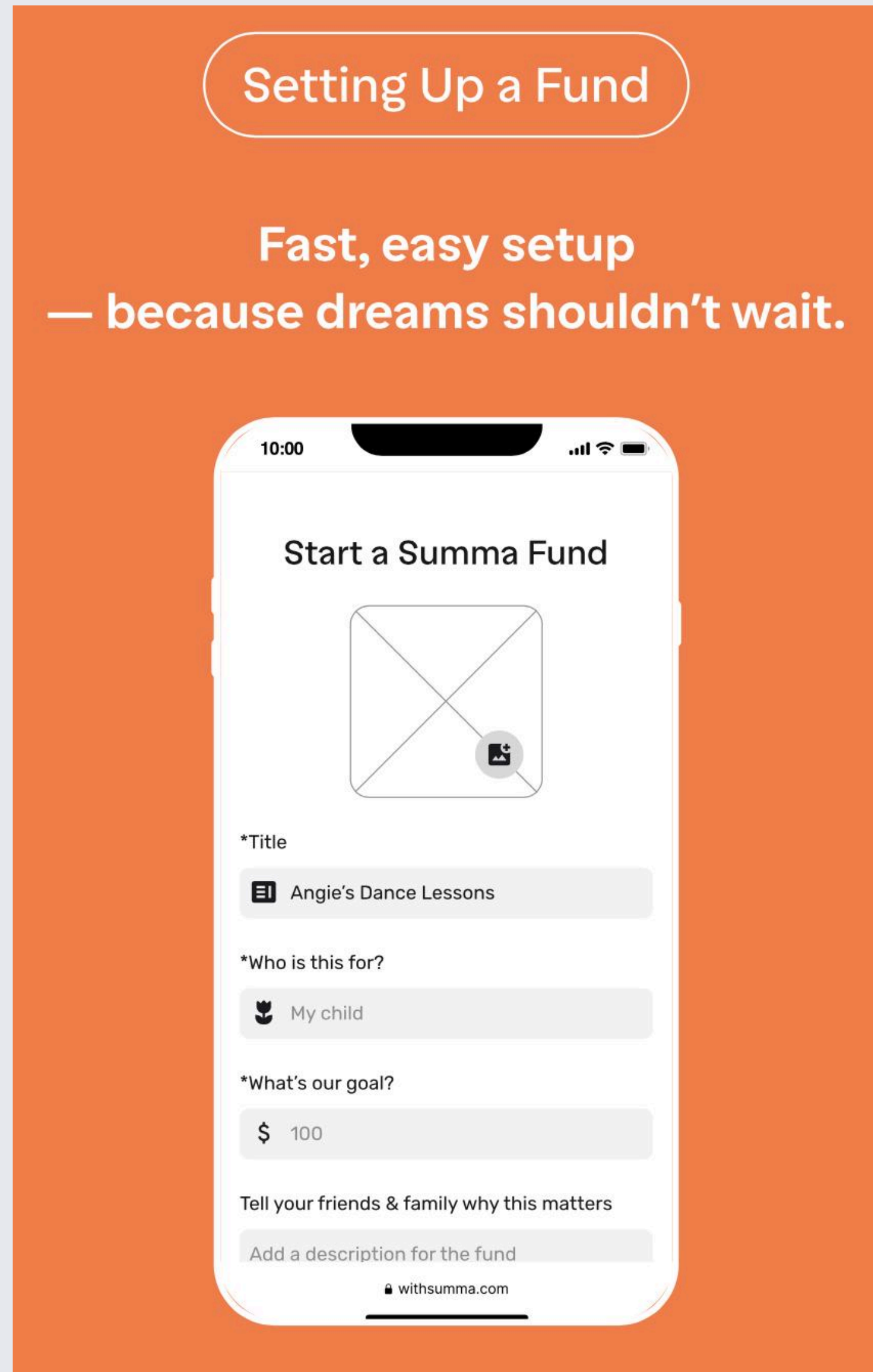
- Friends, family, or community members receiving requests.
- Decide whether to give based on trust, clarity, and personal connection.
- Value transparency (where funds go, progress updates) and ease of donating.

Slide 1 – How It Works



- **Top Insights**
 - Clear step-by-step structure, easy to follow.
 - Parents and donors understood the purpose (fundraising for activities).
- **What Needs Work**
 - Missing clarity that this is for kids' extracurriculars.
 - Page felt static — some expected clickable flow.
- **Recommendations**
 - Make Steps 1–3 interactive → clicking “Step 1” should lead to setup, then bounce back to continue to Step 2, etc.
 - Add photos of kids/activities + tagline: “for after-school & extracurricular programs.”
 - Bold “Set up a SUMMA Fund” for stronger visual hierarchy.

Slide 2 – Setting Up a Fund

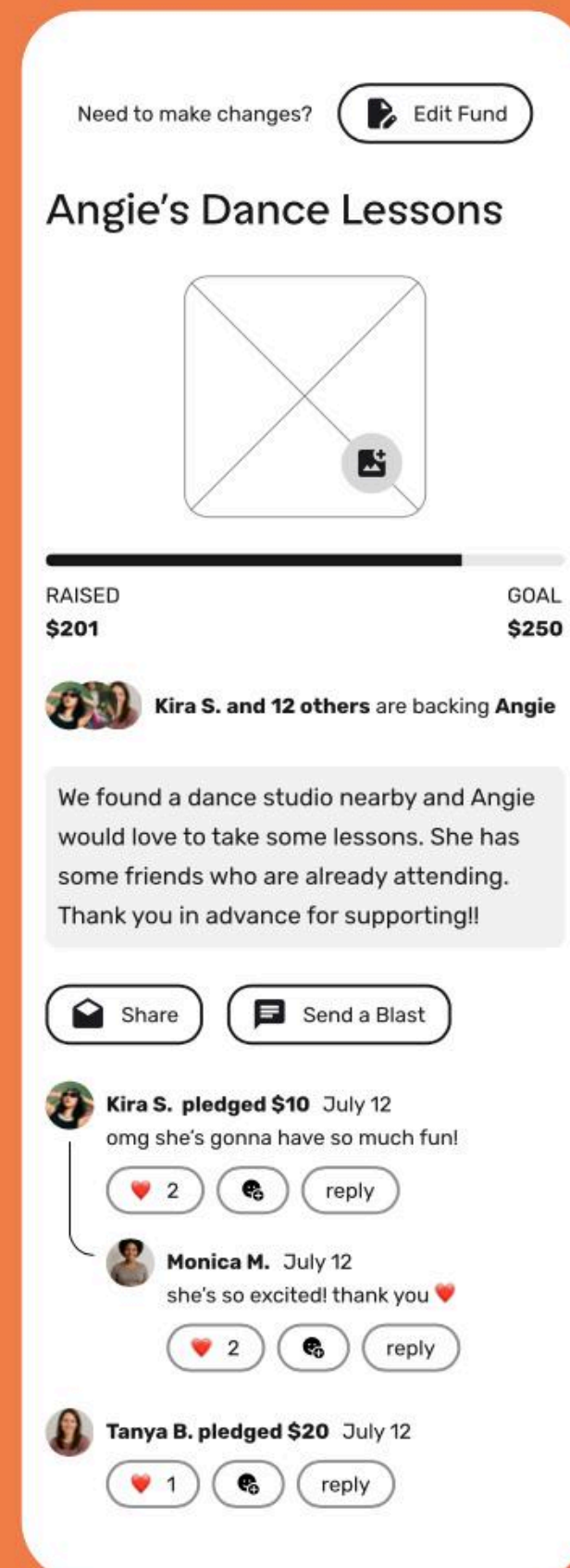


- **Top Insights**
 - Parents liked personalization (photo + story makes it “real”).
 - Donors felt it gave just enough information.
- **What Needs Work**
 - Parents wanted **timelines/deadlines** for urgency.
 - Confusion about multiple kids/programs.
 - Some didn't want to upload a child photo — raised privacy concerns.
- **Recommendations**
 - Allow **multiple kids/programs per account**.
 - Add **date range** or “funding ends in X days.”
 - Offer alternative photo options (e.g., program logo, YMCA, activity image).
 - Add inline help (“**i**” **tooltips + sample descriptions/pictures**).

Slide 3 – Fund Updates & Engagement

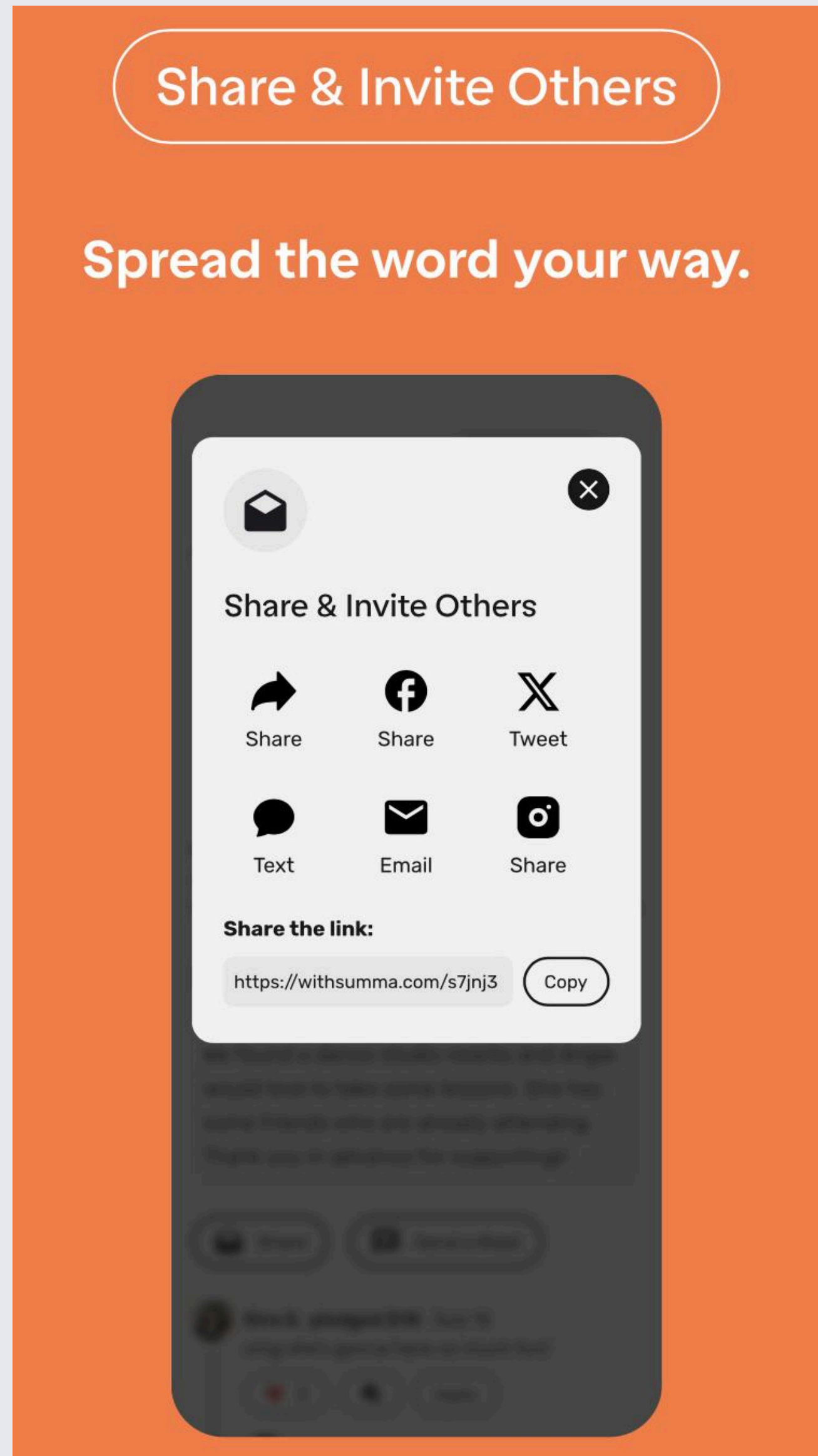
Let Your Circle Follow Updates for the Fund

Share updates, respond to questions,
and celebrate milestones together.



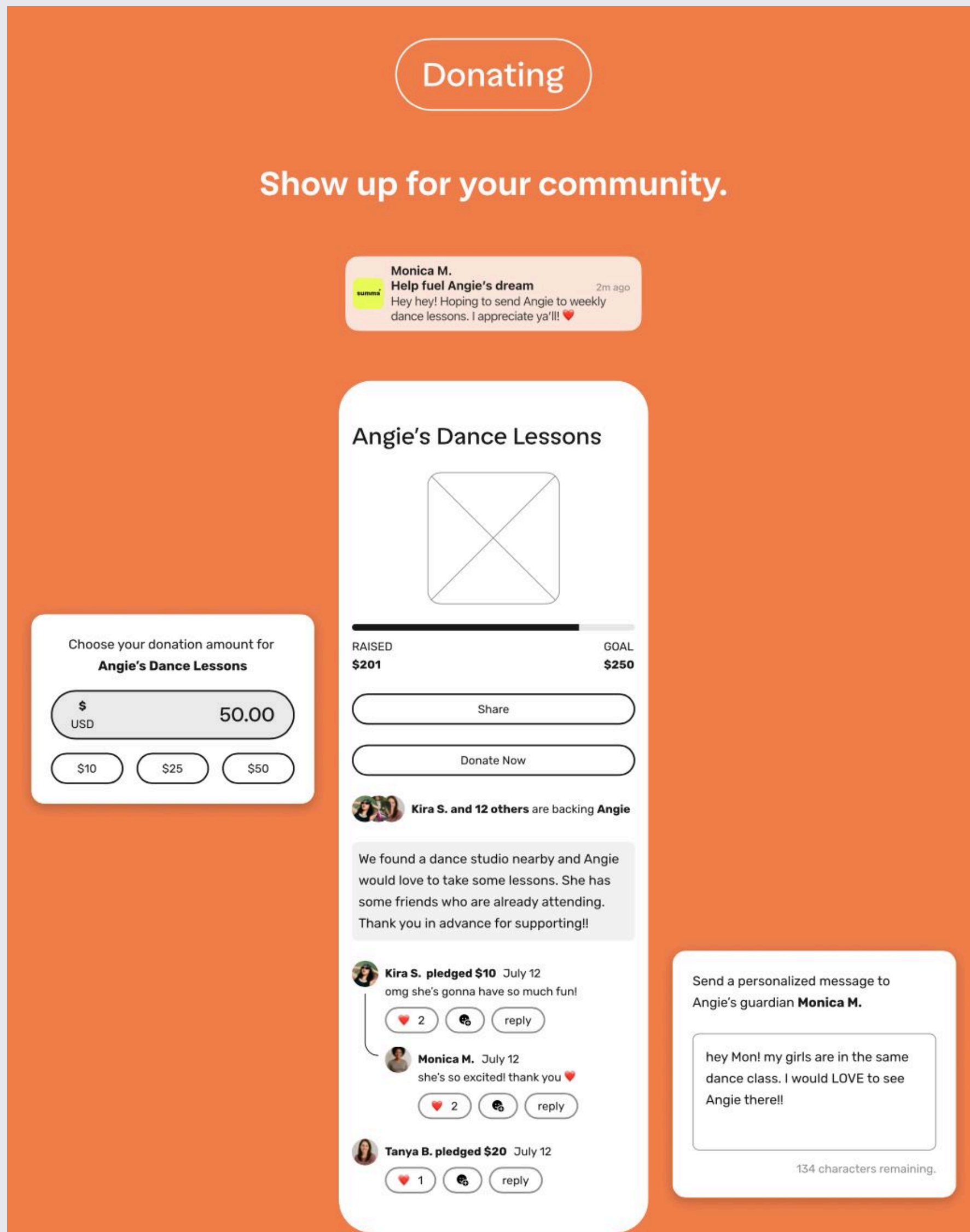
- **Top Insights**
 - Comments/likes create community and help families show appreciation.
 - Transparency (goal bar, updates) motivates donations.
- **What Needs Work**
 - Some parents wanted more privacy controls.
 - Donors wanted option for anonymous giving.
- **Recommendations**
 - Allow toggle for visibility of comments/updates.
 - Include anonymous donation option.
 - Layout order: Photo → Description → Goal → Comments.

Slide 4 – Share & Invite



- **Top Insights**
 - Text/email most preferred by parents.
 - Donors see texts as more personal and trustworthy.
- **What Needs Work**
 - Missing channels: WhatsApp, LinkedIn.
 - Messages risk feeling spammy without personalization.
- **Recommendations**
 - Add **copy link, WhatsApp, LinkedIn.**
 - Provide **preset text/email templates** with fields for personalization.
 - Auto-populated but editable message: “Hey [Name], we’re raising for [Activity].”

Slide 5 – Donating Experience



- **Top Insights**

- Flow understood (text → fund page → donate).
- Parents and donors liked preset amounts and ability to add a message.

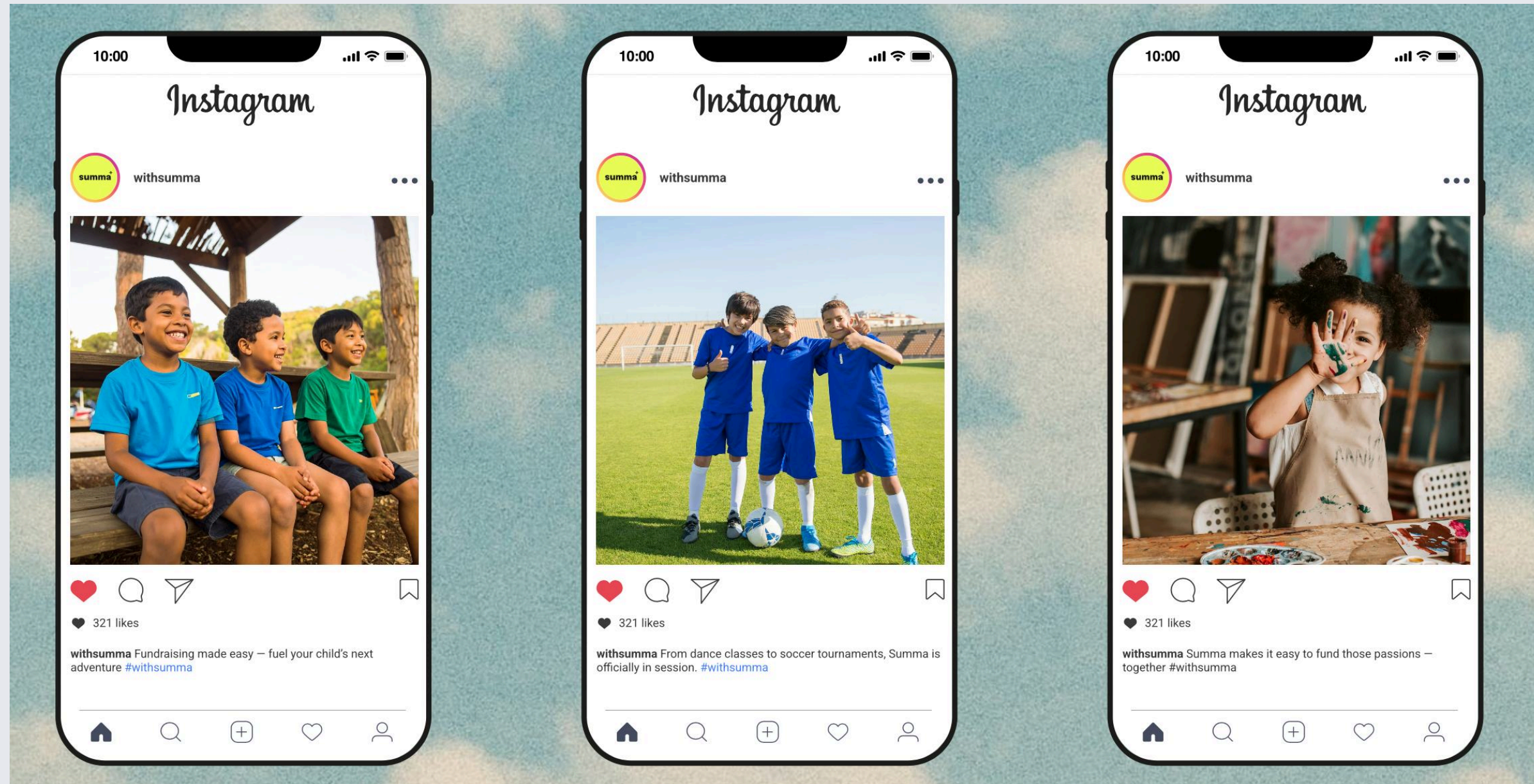
- **What Needs Work**

- Links looked scammy if just plain text → need name/photo to validate.
- Donation page order confusing (Share and Donate buttons same size, description buried).
- Not obvious that you could enter a custom amount.

- **Recommendations**

- **Page layout:** Photo → Description → Goal/Progress → Donate CTA → Comments.
- Make **Donate button bigger/more prominent** than Share.
- Add **“Other” button** next to preset \$10/\$25/\$50.
- Integrate Apple Pay/PayPal/Venmo for trust + convenience.
- Optional: allow parents to **upload event/location details** (e.g., YMCA, dance studio) for verification.
- Future idea: **preset donor updates/messages** (“Thanks! Mia completed her first swim lesson today”).

Slide 6 – Social Media Posts



- **Recommendations**

- **Add explicit fundraising CTA** in captions: “Support kids’ activities through SUMMA.”
- Always include “Donate today / Link in bio.”
- Use authentic family photos, more diverse representation.
- Show real kids/programs instead of generic staged shots.

- **Top Insights**

- Positive emotions: kids look happy and inspired.
- Some captions resonated (“Fuel your child’s next adventure”).

- **What Needs Work**

- Posts not always clear that this is fundraising.
- Looked like ads for camps/programs, not SUMMA.
- Representation: lacked diversity, some felt stock/AI-like.

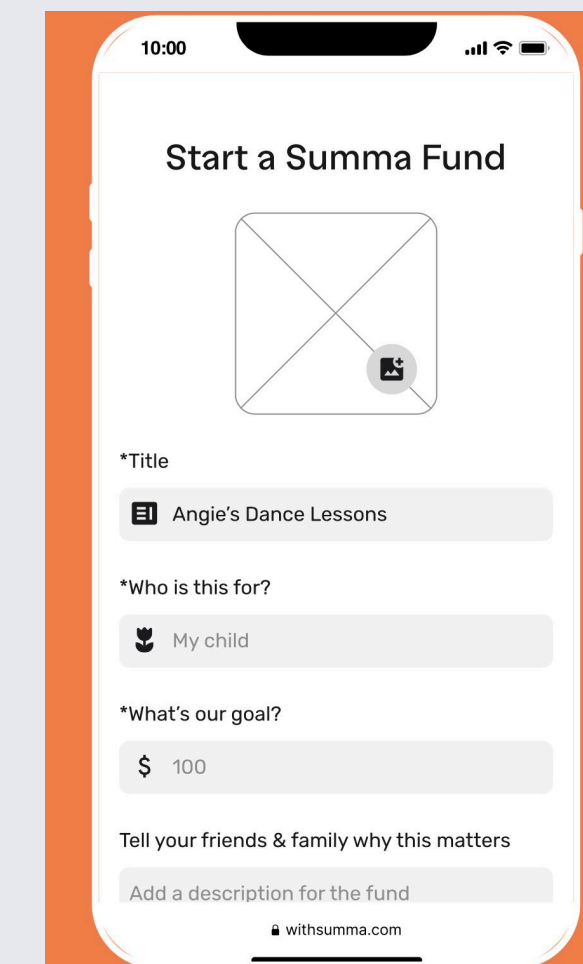
Additional/Future Features (emerging themes)



- **Preset thank-you and progress messages** → automatic follow-ups donors receive after milestones.



- **Event/schedule integration** → parents upload games/practices so donors can attend or follow along.



- **Example templates for fund pages** (sample photo, sample goal/description).

Next Steps & Recommendations



1. Clarify Messaging & Design

- Refine homepage and social media posts to highlight SUMMA as a kids' extracurricular funding platform.
- Reorder page hierarchy: photo → description → goal → CTA → comments.
- Use authentic, diverse imagery to build trust and relatability.



2. Build Trust & Transparency

- Add clear end dates for campaigns.
- Provide optional activity/location details (e.g., YMCA, dance studio).
- Give parents moderation tools for comments.



3. Ease of Use for Parents

- Add “info tips” (i) to guide setup.
- Offer preset text messages, example photos, and sample fund pages.
- Support multiple children/funds and optional scheduling.



4. Improve Donor Experience

- Add an “Other Amount” option to donation presets.
- Simplify share flows with copy-link + personalized templates.
- Integrate frictionless payments (Apple Pay, PayPal, Zelle).



5. Keep Engagement Ongoing

- Enable automatic thank-you and progress updates.
- Showcase children's milestones to celebrate impact with donors.

Implementing these updates will help SUMMA feel more legitimate, easy, and motivating for both parents and donors

Next Steps & Recommendations Timeline



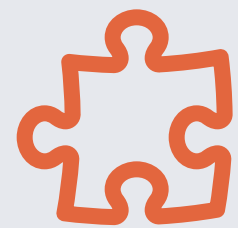
Short Term (0–1 month)

- Clarify fund page flow: description → goal → donate/share → comments
- Add “Other” donation option to preset amounts
- Preset text & fund examples for parents
- Trust signals: Apple Pay, PayPal, Zelle, etc.



Medium-Term (1-3 months)

- Preset update messages for parents/donors (e.g., “We’re almost at our goal”)
- Timeline/deadline options to create urgency
- Parent controls: toggle sharing, comment moderation



Long-Term (3+ months)

- Verified activity/org tags (e.g., YMCA, dance school)
- Scheduling/calendar feature for practices/events
- Refined social media strategy (make posts clearly about kids’ extracurricular fundraising, not just “happy kids”)

Key Takeaway



Parents want fundraising to feel simple, personal, and legitimate!