

UX Research Summary Report



Overview



Secondary Research

Objectives

- Gather contextual information to understand the role of user experience research within the website redesign project
- Understand existing research and secondary research conducted.
- Understand best practices by studying government design systems and competitor websites

Methodology

CONTEXTUAL RESEARCH



COMPETITOR ANALYSIS



Primary Research

Objectives

- Analyze survey information gathered to understand the most common tasks performed by TRS members on the TRS website.
- Triangulate the survey data with contextual data collected during secondary research to obtain a clear list of common tasks, top pain points and improvement areas.
- Conduct preliminary user interviews with two major user groups.
- Understand the existing architecture and use methods to support the current content review and auditing process.

Methodology

WEBSITE FEEDBACK SURVEY



EMPLOYEE SURVEY



USER INTERVIEWS



Information Architecture

Objectives

- Evaluate existing content quality and alignment with goals to improve user experience and guide content migration during the redesign.
- Understand how users organize information to refine website structure and navigation.
- Improve content findability and usability by validating labels and navigation paths based on user preferences.
- Assess website navigation effectiveness by testing users' ability to locate content.
- Refine navigation structure based on user feedback to enhance overall usability and task success rates.

Methodology

CONTENT AUDIT & INVENTORY



CARD SORTING (PENSION BENEFITS)



TREE TESTING



UX Design

Objectives

- Build wireframes and mockups to define the look and feel of the redesigned website.
- Use UX Research insights to guide and inform the design of the website.
- Build and refine existing style guide to maintain consistency across web pages.
- Adopt component based design for flexibility and ease of implementations

Methodology

HI-FI WIREFRAMES



STYLE GUIDE / UI KIT



COMPONENTS

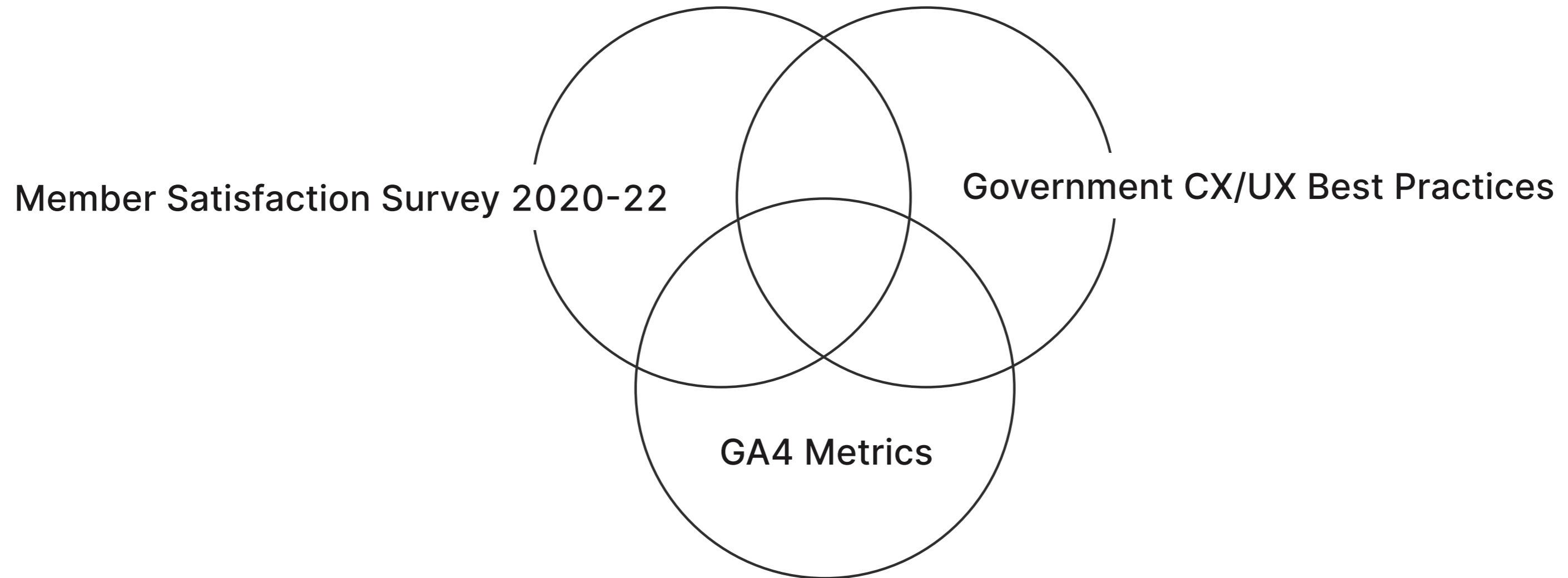


Secondary Research



Secondary Research

Contextual Research



Secondary Research

1. Member Satisfaction Survey 2021-22 - Insights



The most common way of interacting with TRS is through the website but it is not the most satisfactory.

Highest satisfaction ratings for in-person or higher engagement activities such as

- Speaking with counselor
- Visiting TRS facilities
- Attend a group session



Some information gaps exist in TRS Brochures like TRS Member Benefits Handbook, TRS Service Credit Purchase, etc. This could be addressed and supplemented by content on the website.



Email subscription and retirement planning resources have low findability



59% of Active Members did know where to look for information related to estimating their income



Several TRS Topics which are important to members are not provided as satisfactorily as possible

2. GA4 Metrics Reports & Recommendations

Track File Downloads

To identify and keep track of the most commonly accessed resources on the TRS Website

Track Outbound Links

To measure the effectiveness of website content in directing traffic to desired destinations such as TRS Newsletters, TRS Careers page, MyTRS Signup, etc.

Use GA4 Metrics in conjunction with GovDelivery and Usability Tests

Monitor overall performance of the website by tracking site performance in terms of speed/load times, traffic and usability.

Secondary Research


3. Government websites CX/UX best practices

Service standard points

1. [Understand users and their needs](#)
2. [Solve a whole problem for users](#)
3. [Provide a joined up experience across all channels](#)
4. [Make the service simple to use](#)
5. [Make sure everyone can use the service](#)
6. [Have a multidisciplinary team](#)
7. [Use agile ways of working](#)
8. [Iterate and improve frequently](#)
9. [Create a secure service which protects users' privacy](#)
10. [Define what success looks like and publish performance data](#)
11. [Choose the right tools and technology](#)
12. [Make new source code open](#)
13. [Use and contribute to open standards, common components and patterns](#)
14. [Operate a reliable service](#)

Contents

- 1. Start with user needs
- 2. Do less
- 3. Design with data
- 4. Do the hard work to make it simple
- 5. Iterate. Then iterate again
- 6. This is for everyone
- 7. Understand context
- 8. Build digital services, not websites
- 9. Be consistent, not uniform
- 10. Make things open: it makes things better




Service Standard - Service Manual - GOV.UK

The Service Standard helps teams to create and run great public services.

[gov.uk](#)

Design principles

- Start with real user needs
- Earn trust
- Embrace accessibility
- Promote continuity
- Listen



Design principles

USWDS makes it easier to build accessible, mobile-friendly governm...

[designsystem.digital.gov](#)

Link: <https://digital.gov/communities/user-experience/>

Secondary Research

Competitor Analysis

Looked at seven retirement systems in depth to identify common design patterns, features and functionalities provided on these websites

Teacher Retirement Systems

- California State Teacher Retirement System (CALSTRS)
- TRS Illinois
- New York State Teacher Retirement System (NYSTRS)

Employee Retirement Systems

- California Public Employees Retirement System (CalPERS)
- City of Austin Employees Retirement System (COAERS)
- Iowa Public Employees Retirement System (IPERS)
- Colorado Public Employees Retirement Agency (COPERA)



Competitor Analysis - Key Insights

User-friendly forms pages

- Forms page can be made searchable, can include filters.
- Commonly used forms are digitized, allowing users to easily fill it online.
- Link to forms that can be filled/submitted via portal.

Flexible navigation options

- Vertical navigation exists to make browsing on content heavy pages easier.
- Mega menu uses whitespace and icons to improve readability.

Accessibility and translation features

- Accessibility widgets are present to address accessibility needs of our primarily older adults
- Translation options are present or most-visited pages/forms have translated versions.

Continuous feedback

- Single-question survey such as “Was this page helpful” is provided as an option for continuous feedback
- Potential placement include in the footer.

Competitor Analysis - Key Insights (continued)

Separate page for news and articles

- News and newsletter access is through a separate website akin to a blog.
- Separate member specific/relevant information and news releases.

Content Strategy and Layout

- Accordion menus improves overall content layout.
- Competitors have dedicated content strategists to constantly refine overall strategy.

Primary Research



Primary Research

Website Feedback Survey

Participants

494 Participants

Recruitment

Via link on the website header. Open to all members visiting the website.

Links:

Survey_Drafts

Survey_Analysis

Website Experience Feedback_all



Primary Research

TRS Staff Website Experience

Participants

34 Participants

Links:

TRS Staff Website Experience_all

Recruitment

Via internal email and communication channels

Primary Research

Preliminary User Interviews

Participants

4 Active Members

2 Retired Members

Links:

User Interviews documents

Key Insights & Recommendations

Revise Content Strategy & refine IA

- Most frequently cited concern across all studies is information overload with low findability and discoverability of information on the website.

Improve site-wide search

- Internal site search results were irrelevant, outdated or unhelpful.
- Improve information scent and findability of resources with tagging, related resources, etc.

Simple and plain language

- Terminology, labels, phrasing and categories were inconsistent and/or redundant in places.
- Language used was dense or jargon-laden in some sections.

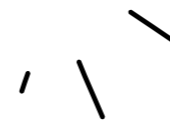
Improve forms page layout and functionality

- Forms page is one of the most visited one, but it requires significant improve in terms of navigation and searching
- Better methods for filling and submitting forms can be provided to make it more user friendly

Key Insights & Recommendations

Use human-centered and trauma informed design principles for end-to-end service delivery

- User interact with a government website in different conditions and mental states.
- Most members have no other option but to interact with a government website for availing services essential to their livelihood.
- Bridge any empathy gaps in communication through the website and outside of it by adopting a human-centered, trauma informed approach.



Information Architecture



Content Audit & Inventory

- ABOUT TRS
- AUDIT
- BOARD OF TRUSTEES
- CAREERS
- MEDIA CENTER
- LAWS/RULES/LEGISLATION
- VENDORS

- PENSION BENEFITS
- HEALTH BENEFITS
- EMPLOYERS

Content Review Checklist

Content

- Is the content written with the intended audience in mind?
- Is the content up-to-date and relevant?
- Is the content concise and simple?
- Is the content organized with a clear hierarchy and informative headings?
- Is the content easy-to-read and scannable?

PDFs

- Does it have to be in PDF format?
- Could this information be converted to an actual webpage? *(better accessibility, able to measure traffic)*

Images

- Are the images inclusive and representative of all our members ages, ethnicity, etc.?
- Do all images have a concise and descriptive alt-text?
- Are all images up-to-date and relevant to the content?

Links

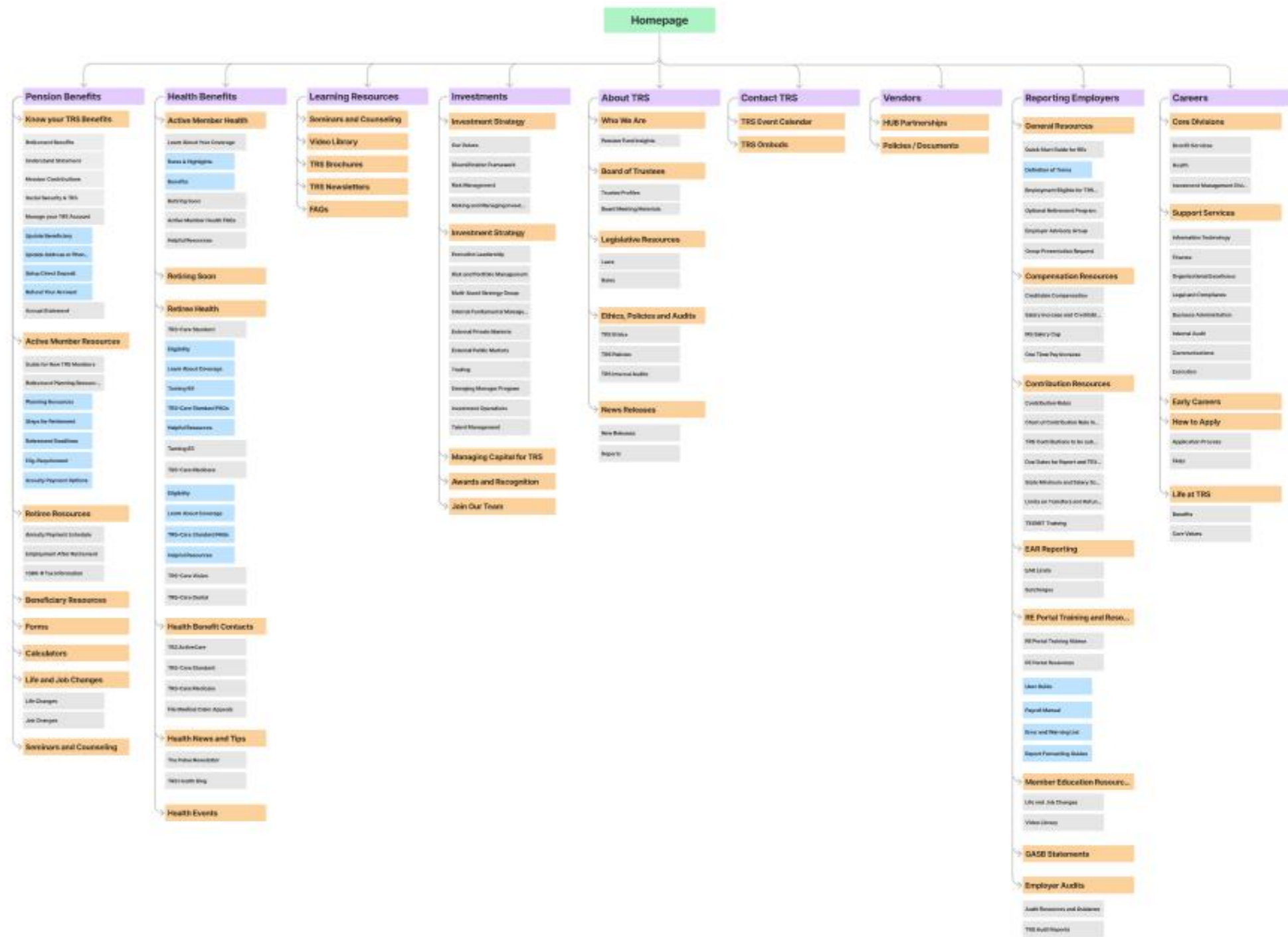
- Are the links named/labeled meaningfully?
- Are the links helpful and relevant to the users?
- Are there any missing or broken links?
- Are there any additional links that may be useful to the users?

Information Architecture

IA Diagram

Link:

[Figma File](#)



Information Architecture

Card Sorting

Participants

22 Participants

3 Sessions - 2 In-person, 1 online

Standardization grid

Download Add a note

Total participants 0 22

| Name | Active M... | Calculato... | Life and J... | Manage ... | Retirees | Retireme... | Seminars... | Understa... | Video Re... | Not standardized |
|--------------------------------|-------------|--------------|---------------|------------|----------|-------------|-------------|-------------|-------------|------------------|
| Planning for retirement steps | 3 | | | | | 15 | 2 | 2 | | |
| 1099-R Tax Information | | | | 10 | 10 | 1 | | 1 | | |
| Annuity Benefits Payment Sch | 1 | 1 | | 2 | 14 | 1 | | 3 | | |
| Benefit Enhancements -2023 | 2 | | | | 16 | 1 | | 2 | | 1 |
| Calculating Retirement incom | | 19 | | | | 3 | | | | |
| Deadlines for Retirement | 4 | | | | | 15 | | 1 | | 2 |
| Death Benefits and Claim info | | | 7 | 3 | 7 | 1 | | 1 | | 3 |
| Disability Retirement | 4 | | 3 | | 3 | 9 | | 1 | | 2 |
| Employment after Retirement | | | 4 | | 14 | 4 | | | | |
| Financial Awareness Videos | | | 1 | | | 2 | | | 19 | |
| How is the health of TRS Func | 1 | 6 | | | | | | | | |
| In-office counseling sessions | | | | | | | | | | |
| Member Education Videos | | | | | | | | | | |
| Member and Employer contrib | 5 | 2 | | | | | | | | |
| Partial Lump Sum Option | 4 | 5 | | | | | | | | |
| Pension Benefit Design Studie | | | | | | | | | | |
| Pension Fund facts at a glance | | | | | | | | | | |
| Refunding your TRS account | 8 | 1 | | | | | | | | |
| Regional Field Office Visits | 1 | | | | | | | | | |
| Retirement Benefit Presentati | | | | | | | | | | |
| Retirement Benefits estimatio | | 20 | | | | | | | | |
| Retirement Eligibility Requir | 4 | | | | | | | | | |

3D cluster view

View potential groupings

Show 10 groups suggested

10 (range 1 to 30)

Explore individual groups

Options

Group 6

Similar category labels

- Retirement 101 **75%**
- Active Members **44%**
- Active Members **38%**
- Preparing to Retire

Cards included

- Planning for retirement steps
- Deadlines for Retirement
- Disability Retirement
- Partial Lump Sum Option
- Retirement Eligibility Requirements
- Understanding the pillars of a secure retirement

Information Architecture

Tree Testing

2 Trees

10 tasks each

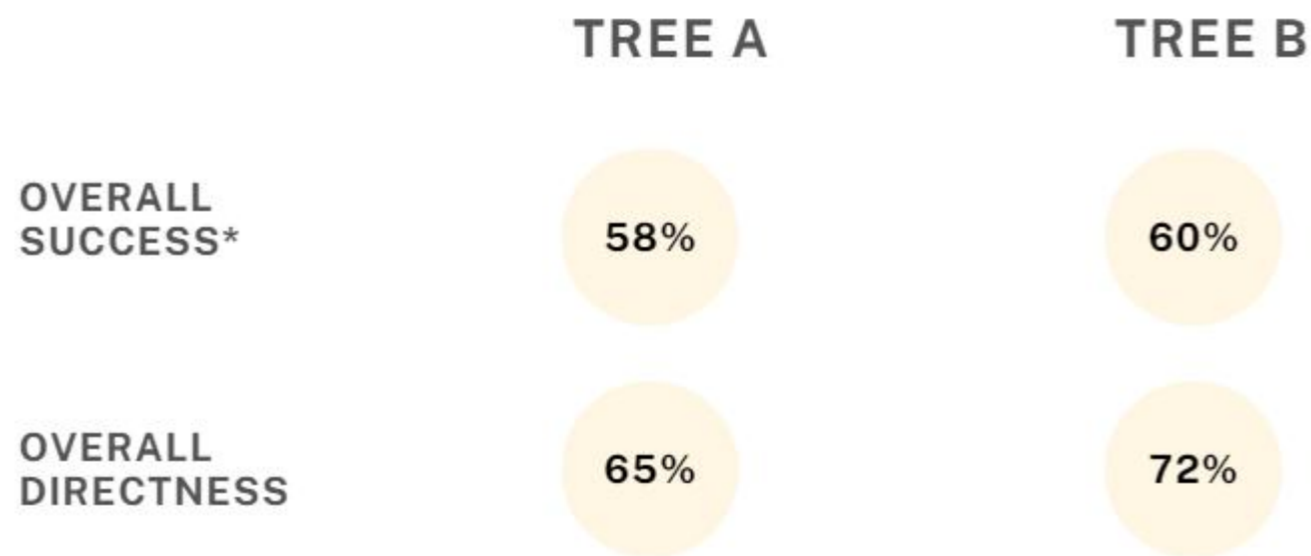
Participants

150 - Test A

138 - Test B



Tree Testing - Results



TREE A

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| OVERALL SUCCESS* | 79% | 47% | 62% | 51% | 67% | 72% | 61% | 18% | 63% | 63% |
| OVERALL DIRECTNESS | 59% | 47% | 51% | 65% | 81% | 75% | 78% | 65% | 69% | 57% |

TREE B

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| OVERALL SUCCESS* | 70% | 46% | 50% | 54% | 65% | 66% | 56% | 56% | 59% | 76% |
| OVERALL DIRECTNESS | 70% | 59% | 42% | 69% | 85% | 74% | 77% | 74% | 86% | 84% |

Findings & Recommendations

Topic based grouping seems to perform slightly better

Some labels need further clarification

Forms & Resources category - mixed results

- This section was helpful in some tasks such as “Update your address” or “Borrowing from TRS” - It seems make Life and Job Changes more discoverable. But was an evil attractor in other cases
- Keep Forms section but rename label for clarity or Edit Pension Benefits section further

Life and Job Changes placement

- Several tasks indicate that people find Life and Job Changes section more easily from Contact Us than Pension Benefits. But in many cases, people do not select Life and Job Changes even after expanding Contact Us - instead opting to Contact TRS directly.
- Label could be reworked or featured more prominently on landing page

Design



Design

Figma File Walkthrough

Next Steps



Next Steps

- ✿ Usability Testing with UT
- ✿ Member Attitudes survey
- ✿ MyTRS Research Studies
- ✿ Other research studies
 - Persona generation
 - Service Mapping