

Card Sorting session

When: March 18th and/or March 19th

Location: Red River and/or Alpha

Duration: 25-30 minutes for each session.

Participants: 10-15 TRS employees for each session.

Requirements: Each participant brings their own laptop for accessing the card sorting exercise on [Optimal Workshop](#) platform. They do not need to have an Optimal Workshop account to complete the study.

Participants need not be particularly knowledgeable about card sorting or the website. We want to ensure a good mix of expertise in the participants that is representative of general TRS members.

Depending on the time the session is scheduled for, compensation will be provided as lunch or snacks.

What is Card Sorting?

Card sorting is a method used to help design or evaluate the information architecture of a site. In a card sorting session, participants organize topics into categories that make sense to them, and they may also help you label these groups. While these labels may not be included verbatim in the final Information Architecture of the website, it is useful data to understand how to group existing content in a way that makes sense to the users and to know what the content groups are likely called in the user's mental model.

[Link to an online Card Sorting study demo.](#)

Study recruitment process:

We plan to reach out to the directors of the following divisions and ask for 2-3 staff members who would be able to participate in the card sorting exercise:

Investments, Security and Facilities, Health Benefits, Pension Benefits, Procurements, IT, Careers.

As mentioned above, we would like to recruit participants across divisions to ensure a better representation of TRS members. There is no requirement regarding prior knowledge or expertise with the website, card-sorting, or the optimal workshop platform.

How each session would go:

- 10-15 participants will be gathered in a room with each participant bringing their own laptop devices to access the online card sorting link on the Optimal Workshop platform.

- Session moderator will walk participants through the card sorting exercise on a large screen. Participants will be encouraged to ask questions or seek out assistance if they run into any issues.
- Participants can complete the exercise independently while the moderator walks around making observations notes and/or answering questions.
- Participants can leave once the study is completed.
- Lunch/snacks will be provided to compensate participants for their time and insights.

The exercise can also be completed online independently, in an unmoderated fashion where each participant is sent the link to complete in their own time. The pros and cons of the proposed method vs the online unmoderated card sort is listed below:

In-person, moderated (online card sort)	Online unmoderated card sort
<p>Pros:</p> <ul style="list-style-type: none"> • Can explain how card sorting works. • Can clarify any confusion or answer questions. • Helpful for researchers to see where participants get stuck. • Get insights from observing participants. • Lunch/snacks will be provided! 	<p>Pros:</p> <ul style="list-style-type: none"> • Can send to more people, easy to setup & recruit. • Lower risk of group-think as participants take it separately. • Higher probability of completion as users can take it as per their convenience.
<p>Cons:</p> <ul style="list-style-type: none"> • Logistics of setting up. • Risk of group think. 	<p>Cons:</p> <ul style="list-style-type: none"> • Not many options to clarify card sorting process, so there could be higher error rate. This could potentially bias the study results.