

## Research

These scripts provide a model for the Zoom-based testing sessions that also include user journey research questions. We plan to use the scripts below as a basis for preparing 30- and 60-minute testing sessions, where each session asks an appropriate number of questions to fit this timeframe. Therefore, the questions provided below are likely an overestimate of the number of questions or tasks any one participant will receive.

We will use Desktop, Mobile, and Assistive Technology (AT) templates for running usability testing sessions. The scripts include a preamble, questions we'll post to participants, and task instructions we'll provide during the call.

### Desktop testing session

- Introduction:
  - Thanks for taking the time to speak with us today. As I mentioned in my email, NSF is working to improve the experience of using NSF's Funding search tool for funding seekers and administrators working in a wide range of fields. We want to identify pain points, needs, and learn about how researchers like you currently search for funding through NSF.gov, and elsewhere.
  - You should have already received the standard design research agreement that we ask participants to fill out. If you haven't already, please review and submit the form at your earliest convenience.
  - What you say will be confidential. Any reports we make will anonymize the information you provide. If we want to get a direct quote and attribute it to you, we will come back to get your approval.
  - Though we'll be asking you to run through some tasks, this is ultimately just a conversation. We really want your honest thoughts and opinions and there are no right or wrong answers.
  - During part of the session, we will want to watch you use the site. During this part of the session, we will be using what's called a think aloud protocol. This means that I would like you to say whatever you are thinking, doing, or looking at as we proceed. The purpose of this is for me to understand what is going on behind your actions. I may probe for more information or ask additional questions. If you have any questions for me, you can ask at any time. If you need a break, please feel free to speak up.
  - So that we don't miss anything, we would like to get a screen and audio recording of our session. Is that okay?
  - Before I ask you questions, do you have any immediate questions for us?
- Basic questions:
  - What is your field of work?
  - Have you used NSF.gov to look for funding opportunities before?
  - Do you visit NSF.gov for any other reason? If so, what?
- Usability questions:
  - Ok, let's look at the site. Could you open NSF.gov on your computer and screen share with us so we can see what you're looking at?
  - Shortly I will ask you to test some specific things, but before we do that:
    - Please navigate to the Funding search page
    - Could you please walk me through what you're seeing here, your initial impressions?
    - It helps us to hear your thought process, and there's no right or wrong answer.
  - Okay, now I want to move to some specific tasks. I'm going to describe a scenario, and ask what you would do in that situation. After I've given you the prompt, please go ahead and perform that task while talking me through what you're thinking as you go.

- **Scenario 1:** You've decided to look for some grant opportunities in your field. How would you start searching for funding opportunities related to your research topic?
  - **Extra prompts (if needed):** What part of the page do you start with and what do you do there?
- **Scenario 2:** How do you find results that match a specific term?
  - **Extra prompts (pick closest match):** Like environmental sustainability, human-centered computing, small business, or Dear Colleague Letters
  - **Variant (if needed):** You suspect your chances of finding results will be higher if you search for an exact match. How would you go about searching for an exact phrase?
- **Scenario 3:** You want to start by limiting results to Funding opportunities offered through the Biological Sciences directorate. How would you go about this?
  - **Extra prompts:** At NSF, directorates refer to categories while divisions are their sub-categories
  - **Variants:**
    - How do you limit your search to a specific directorate (e.g. Geosciences)?
    - How do you filter results based on NSF directorates or divisions?
- **Scenario 4:** You'd like to find a specific funding opportunity. How would you do that type of search?
  - **Extra prompts:** For a funding opportunity such as "23-515" or "Science of Organizations"
- **Scenario 5 (pick closest match):** You're new to NSF.gov/You're not finding what you expect and you'd like an overview of how to use Funding search or a definition of an agency-specific term. What do you do next?
  - **Extra prompts:**
  - **Variants:**
    - How do you look for help with this page?
    - How do you find out what an NSF-specific word or phrase means?
- Additional ideas for consideration:
  - Scenario 6: Try a search for "nebula" (returns no results)
  - Scenario 7: You want to narrow your search based on eligibility factors. Where would you start in this case? (DCL and award type testing)
- Journey questions:
  - Now I'd like to pull back and ask some broader questions about searching for funding opportunities.
  - What are you looking for as you scan results?
  - Once you've found items of interest, could you walk me through your next steps?
  - Where would you find guidelines and other information to actually apply for funding?
  - Is there a page or section of the site that is most informative for you?
  - Do you look for funding opportunities on other websites?
    - Which ones?
    - How does that tool compare to the funding search on NSF.gov?
- Closing questions:
  - Is there anything we didn't ask that you'd like to add?
  - Is there anyone you work with you think we should speak to? Who?
  - Would you like to be involved in testing design prototypes as we move forward?
- Wrap-up:
  - Thanks very much for your time!

- We'll send a follow up email with your thank you gift card. Please feel free to ask us any questions that come up.

### **Mobile testing session**

Mobile testing is the same as the Desktop version, except for the following differences.

- Introduction: (same as Desktop)
- Basic questions: (same as Desktop)
- Usability questions:
  - Ok, let's look at the site. Could you open NSF.gov on your phone, and screen share with us so we can see what you're looking at?
  - (rest same as Desktop)
- Journey questions: (same as Desktop)
- Closing questions: (same as Desktop)
- Wrap-up: (same as Desktop)

### **Assistive technology session**

AT testing is the same as the Desktop version, except for the following differences. Our intention is to test with everyday users of assistive technology.

- Introduction: (same as Desktop)
- Basic questions: (same as Desktop)
- Usability questions:
  - Ok, let's look at the site. Could you start sharing your computer's video and audio, then open NSF.gov in your browser?
  - (rest same as Desktop)
- Journey questions: (same as Desktop)
- Closing questions: (same as Desktop)
- Wrap-up: (same as Desktop)