DISCOVERY

“The real voyage of discovery consists not in seeking new landscapes, but in having new eyes.”
— Marcel Proust
**DISCOVERY | METHODOLOGY**

**OBSERVATION**

**INTERVIEWS**

**RESEARCH**

**Target-to-Engagement**

**Successful Interactions**

**Duration of Interactions**

**Solo vs. Team Coordination**

**Contextual Inquiry (...somewhat)**
“They ask if I have a few minutes to talk, but they really want me to give them money.”

“They come off as overly friendly, but it’s like I feel manipulated into talking to them, or made to feel guilty if I ignore them.”

“They to work in teams, and seem to have strategies for getting in your face, even when you want to avoid them.”

“A lot of the time, I am sympathetic to whatever cause they’re representing... but I’m turned off by the round-about way of getting me to commit money then and there.”

“I have to be honest, it seems that sometimes I know more about the topic than they do. It seems like a racket.”
Fundraising Campaign Strategies

Direct Appeal

Various Types of Direct Appeal

Benefits of Face-to-Face Engagement

Motivators

Emotional Appeal

Incentivized Giving

Methods of Giving Trends: Convenience & Efficiency

Online Donation

Mobile Giving
DISCOVERY | DEFINING THE PARTICIPANTS

PARTICIPANTS

LANDSCAPE

PROBLEM

INDIVIDUALS ("TARGETS")

NON-PROFIT ORGANIZATION FUNDRAISING EXECS.

STREET CANVASSERS ("CLIPBOARDERS")

CANVASSING RECRUITING AGENCIES
**Participants**

**Real-time solicitation of support** from individuals out on the street, through one-on-one engagement on a topic is often **obtrusive and disruptive** to individuals.

**Landscape**

**Clipboard/sidewalk engagement** of individuals employs strategy, impositional tactics and social expectations designed **to draw in those who are not looking for an interaction**.

**Problem**

**Street engagement direct appeal campaigns** use **incentives to reward the fundraising activity** of reaching new donors, and rely on **emotional appeals and tactics to motivate those donors**.
**GRACE ABBOTT**

<table>
<thead>
<tr>
<th>35</th>
<th>San Francisco</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Restaurant Owner &amp; Manager</td>
</tr>
<tr>
<td></td>
<td>Married, one child</td>
</tr>
</tbody>
</table>

Grace lives in the Noe Valley neighborhood of San Francisco. She owns and runs a restaurant in The Mission, and loves walking to work. Her schedule is packed from morning to night, but she loves her life.

She and her wife believe in social responsibility and give both time and money to a number of worthy causes.

**NEEDS:**
- Getting through the day without added distraction
- Keeping to her own schedule
- Efficiency
- Keeping track of her commitments

"If you’ve done well in life, that’s great! But don’t forget to give back — you didn’t get there all by yourself."

GREGOR KALFAS – USER EXPERIENCE CASE STUDY – VMD127 – DECEMBER 2014
David Argoose
27 | Berkeley, CA
Software Engineer
Single

David only recently moved to the East Bay after 8 years of living in San Francisco. He still works in the City at a small business systems firm in South Beach, and really doesn’t mind the commute.

David doesn’t own a TV—he is done with “cable” and feels that ad-driven entertainment has gotten out of control. He relies on streaming content for pretty much all of his at home — and on-the-go— entertainment. If he could go completely ad-free, he would.

NEEDS:
Getting his entertainment budget under control
Reducing “message clutter” in his life
Accountability: give something, get something

“My grocery store doesn’t tell me what music I should listen to . . . so my music shouldn’t tell me what toothpaste I should use.”
I have a list of errands to get done, and a good 3 hours before I need to be at work. It's a beautiful day, so I'm going to walk.

I'm off to meet Zack at the movies. Because cinema is uphill, I'll go by MUNI and walking instead of taking bike.

I hate it when a stranger just asks me how I am. I know she wants something, so just cut to it. It's just "fake" otherwise.

"I actually don't. Sorry."

Great. Now I basically just told Planned Parenthood they're not worth my time.

Still Planned Parenthood does such great work.

"Sure, I have some time for Planned Parenthood."

This kid is just rattling off some obviously prepared script.

He's clearly new at this and doesn't seem prepared for my questions.

I know more about Planned Parenthood than he does!

I do think Planned Parenthood is an great organization …

But that seems like a contrived way of getting me to talk.

Plus I don't want to be late.

"I actually don't. Sorry."

Great. Now I basically just told Planned Parenthood they're not worth my time.

I felt manipulated, like I was the target of some strategy designed to pull me in. That was kind of a waste of my time. If Planned Parenthood wants me to contribute, they need to do a much better job at engaging me and keeping my attention.
DIRECT APPEAL ENGAGEMENT

“THE WAY IT IS, OR WHY CLIPBOARDERS ARE SO DAMNED ANNOYING”
## Direct Appeal Fundraising Comparative Analysis Grid

<table>
<thead>
<tr>
<th>Feature</th>
<th>A. Street “Clipboard” Canvassing</th>
<th>B. Phone Bank Fundraising</th>
<th>C. Media Campaigns</th>
<th>D. e-Mail Marketing/Fundraising Campaign</th>
<th>E. Direct Mail Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-person one-on-one engagement</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational control over messaging</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✓</td>
</tr>
<tr>
<td>Unified messaging</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✓</td>
</tr>
<tr>
<td>Targeted contacts based on qualified lead/database</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reliance on real-time commitment</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Permits/encourages a response 24/7 per user’s schedule</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offers secure/confidential handling of personal information</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Direct access to additional written content with messaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Provides multiple means of making donations directly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Non-intrusive means of establishing contact</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
HRC
LGBTQ Civil/Legal Rights Advocate

Direct Appeal Fundraising Activities:
- Direct Mail
- E-Mail Campaigns
- Online and Physical Shops

Relies on:
- Community Calls to Action
- Incentivized Giving: Branded Merchandise

Issues:
- Cost of producing merchandise reduces size of donation
- Low construction quality of merchandise (“crap”) reflects poorly on organization
NPR
Public Radio Broadcaster

Direct Appeal Fundraising Activities:

On-Air Quarterly Pledge Drives

Relies on:

Listener Calls to Action

Incentivized Giving: In-kind donations, and access to “interruption-free” content

Issues:

Acknowledging that they’re creating the pledge-drive interruption nuisance that the donation incentive is freeing you from
DIRECT ENGAGEMENT + EMOTIONAL APPEAL AS MOTIVATOR

Despite overwhelming disdain of practice of street canvassing, organizations still use it because they get a justifiable return.

INCENTIVIZATION OF FUNDRAISING ACTIVITY (vs. of giving)

Canvassers are paid (by agency) commission on dollar amount collected if and after they meet a daily quota.

Canvassing agency take in per donor commission from NPO (without any quota restrictions whatsoever).

INCENTIVIZED GIVING AS ALTERNATIVE TO EMOTIONAL APPEAL

Can replace emotional appeal as motivator.

Need to find sweet spot between “useful”, “affordable” and “responsible” (Not wasteful – Not crap).

GROWING POPULARITY / TREND TOWARD ONLINE GIVING

Efficient means of collecting donations and donor data
Easy method of donating for user.
DEFINING

“To define a thing is to substitute the definition for the thing itself.”
— Georges Braques
Redirect Incentivization Toward the User/Donor

Establish partnerships with content providers to negotiate donations in the form of account upgrades

Offer upgrade rewards as incentives to donate

Remove quota incentivization for canvassers

Use Face-to-Face Engagement to Promote

Change role of street canvasser from “clipboardder” to “engagement agent”

Remove need for “tactics”, and emotional appeal

Motivate to promote and distribute with tracked commission incentives
Push to Online to Collect, Integrate and Inform

Use direct engagement to create online traffic

Utilize online donation to capture new donor information more efficiently, integrate with database and better disseminate and share information.

Encourage “code sharing” to expand new donor reach

Provide Centralized User Interface to:

Allow for quick and easy donation

Earn, apply and manage rewards

Integrate user content accounts
**Time Credits**

Based on two really belabored concepts:

- If clipboarders wanted some of your time, they should offer you some “time” in return.
- Premium, ad-free accounts could be valued in terms of time, as one is freed from having to watch/listen to ads.

**Time Bank**

Extended the “time” concept, but with added dimension of a means to store and track your earned time-credit accounts... huh?

Was confusing... forced... too much of a stretch in getting concept across.

Besides... “Time Bank” is already a thing (and it has nothing to do with this idea.)
UPstream

Speaks directly to the key user benefit:
“a new way to upgrade your streaming content”

Simple, to-the-point

Tested well
Welcome back, David!

Choose which account to apply your PeaceHeart donation reward to:

- Spotify
- Pandora
- Vimeo
- Hulu

Hey David!

Activate your free one-month premium upgrade to Spotify, here:

Take me to UPstream after processing my donation to claim my reward.

With your donation of $15 or more, you can redeem rewards for Premium Access on Spotify, Pandora, Vimeo and more...

donate $15.00

Log-in or Create a New Account to Redeem Your Reward Credits.

e-mail password
For the User

Motivated to donate with positive incentives in the form of low-impact, high-value rewards.

Empowered to donate on own timing; no pressure to respond or donate real-time.

No more guilt through emotional appeal.

Tangible card provides multiple access points to donate and takeaway information on card.

Centralized source for donating, integrating accounts and managing rewards = reduced need for information entry.
DEFINING BENEFITS

FOR THE ORGANIZATION (NPO)

*Lowers the cost of fundraising* by switching to donor-focused incentivization

*Maximizes incentivization strategy* by negotiating low-cost, high-value service-based reward system

*Provides for efficient collection and integration of new donor data* with organization database

*Increase in environmental responsibility (and goodwill)* by offering low-impact rewards: no more crap.

*Co-marketing strategies* with new content provider partnerships extends publicity of cause

*Encouraged shareability of cards and codes* (and through social media) increases awareness and donor base
For the Content Provider

Able to donate a service with a low-provisional cost, while reaping tax benefits based on higher, (advertising-based) opportunity cost

Increases corporate goodwill in establishing partnerships with beneficiary organizations

Participation increases exposure to larger new user base

Temporary accounts upgrades, as with free trial premium accounts, provide growth potential for paid upgrades
For the “Engagement Agents”

Not wholly disenfranchised, the “engagement agents” (i.e., the would-be “clipboarders”) are:

Incentivized through commissions via trackable codes they (or their teams) hand out

Motivated to promote sharing of codes and tout benefits of donating through UPstream

Freed from quota mandates or using disruptive or emotional tactics, have a greater incentive to represent the cause itself
DEVELOPMENT

“Creativity involves breaking out of established patterns in order to look at things in a different way.”

― Edward de Bono
A Card …

Distributed with street engagement interaction; shareable
With trackable UPstream QR and manual codes taking user to NPO’s donation page to earn rewards
Contains takeaway information on NPO and cause

… and a Site

Online account-based user interface
Easy access to NPO-specific donation pages through code entry or site search
Users can earn, manage and apply upgrade points (through integration with users’ streaming content accounts)
OBJECTIVES:

SIMPLICITY

FACILITATE ACCESS TO DONATION/INFORMATION PAGES

PROVIDE EASY-TO-USE INTERFACE TO INTEGRATE USER ACCOUNTS, EARN AND MANAGE REWARD POINTS

EFFICIENCY

STORE INFORMATION TO MINIMIZE NEED FOR USER ENTRY

INTEGRATE WITH CMS AND DATABASES OF PARTICIPATING NPOs

AUDIENCE:

PRIMARY

USERS MOTIVATED BY INCENTIVE REWARDS FOR THEIR DONATIONS TO CHARITABLE CAUSES

SECONDARY

FUNDRAISING EXECUTIVES OF NPO CHARITIES
SCOPE

CAUSE SIDE
This side of the card will be fully branded as if from the NPO itself, with its logo and brief information on the fundraising cause.

It will also have a call-to-action to use codes on flip side to earn incentive rewards by donating.

DONATE SIDE
The flip side of the card will have a trackable QR scan code and a matching alphanumeric key for manual entry on the Upstream website—both linking to cause-specific donation pages for NPO.

It will repeat the call-to-action from the other side, specifying specific incentive rewards.

Also, it will contain information on using Upstream to donate and earn rewards, and have the Upstream logo.
DEVELOP | CONTENT ANALYSIS: SITE

SCOPE

GLOBAL
Each page will have a global header/navigation & footer, search field and the Upstream logo.

DEFAULT LANDING PAGE
Default landing page will open with log-in/create new account window form.

Once form is cleared, code entry field (with optional link to QR scanner for mobile) is featured, followed by link to current offers page, enabling users to browse offers from participating organizations.

DONATION LANDING PAGES
These will be branded with the look and identity of the sponsoring NPO. In addition to a donation form, it will have brief and (through tabs) in-depth information about the charity and the cause.

It will have checkboxes where users can confirm whether or not they have an Upstream account, and will route them accordingly following their donations.

GREGOR KALFAS – USER EXPERIENCE CASE STUDY – VMD127 – DECEMBER 2014
**DEVELOP | INTERACTION DESIGN**

**UPstream User Flow Diagram**

**User Flow Legend**
- **Entry / Exit Point**
- **Site Page / Window**
- **Decision Point**
- **User Input / Action**
- **System Action**
- **External to Site**
- **Alert Window**

*A heavy line indicates a decision pathway.*

**USER FLOW LEGEND**
Transformative necessities agency transform the world inspire breakthroughs citizens of change. Martin Luther King Jr. immunize change-makers tackling, end hunger; network clean water catalyze resourceful lifting people up facilitate rural working families.

Public-private partnerships Medecins du Monde disrupt save lives investment community. Humanitarian; initiative, global citizens cooperation significant women's rights. Minority our ambitions affordable health care foster donate experience in the field.

“Design is not what it looks and feels like. Design is how it works.”
— Steve Jobs
charity: water is a non-profit organization bringing clean and safe drinking water to people in developing countries. We raise awareness about the millions of people living without life’s most basic need and invite others to join our mission.

Our operating costs are covered separately, so 100% of your donation will go directly to clean water projects in developing countries.

Scan or enter the code on the back of this card to give directly to charity: water, and earn UPstream credits for premium content!

You can earn donation credits to upgrade to access premium streaming content on Pandora, Spotify, or Hulu Plus with your donation to charity:water.

Simply scan this QR code on your mobile device, or go to www.upstreampoints.com and enter the following keycode:

**he78-87h7-6fx5**

UPstream: Upgrade your content and your karma!
With UpStream, you can upgrade your streaming music and video content—as well as your karma!—by donating to worthwhile causes.

**How it works...**

Accessing premium, ad-free content through UpStream is super easy... and it feels so good!

---

**Charity: Water**

We're working closely with charitable organizations while bringing clean drinking water to the 1 million people who are without it. Join us.

Give Clean Water

One of your donations will be used to fund clean water projects.

**$15.00 USD**

With a minimum donation of $15.00, you can each toward paying to upgrade your streaming content accounts through UpStream.

---

**Learn More**