The purpose of this guidance is to:

- Provide a set of guiding principles to enable the Good Finance team to be user led whenever and wherever possible
- To ensure that decisions regarding the Good Finance website, content and events are user centered
- To ensure we distinguish between being user led and general good U/X principles

Definitions:

- User-centered design (UCD): Being user-centered means understanding a problem and the users, analyzing user behavior and listening to their wants, then translating this into needs that drive a creative solution to the problem.
- User Experience (UX) Design: User experience (UX) design is the process of creating products that provide meaningful and relevant experiences to users. This involves the design of the entire process of acquiring and integrating the product, including aspects of branding, design, usability, and function.
- User Led: Being user-led or user-driven, on the other hand, means responding to user feedback without applying the filters of analysis and translation.

Good Finance Users

Primary Users

- Charities and social enterprises looking to find information / gain knowledge about social investment
- The primary users of the Good Finance website are the key demographic for which we take responsibility
- These are the following personas:
    - Grass Roots
    - Go Getter
    - Business Savvy
    - It is important that we review and update these persons accordingly as both Good Finance's offering and the marketplace change.

Secondary Users

- Investors, advisers, infrastructure bodies & sector partners who:
    - Have a profile listed on the site
    - Collaborate on content
    - Support at events
    - Share word of mouth

Good Finance's secondary users are the wider network of supports that make the

website's impact possible. These secondary users will also be considered when making decisions that will affect the website, content or events, though the ultimate responsibility remains with our primary users.

Primary User Feedback

- Good Finance's primary users will be contacted twice a year to complete user surveys
- Qualitative user feedback given at events, demos and on social media will be recorded
- Key findings from primary user feedback will be share at steering group meetings, and if relevant, stakeholder group meetings

Website

- The Good Finance website was designed in keeping with general good U/X principles (page speed, image sizes, layout, colour scheme etc)
- All significant changes that are made to the website will be done so in keeping with these U/X design principles
- Any new projects and developments affecting the website (e.g. the key tools, case studied, functions & resources) will be user tested - A U/X review will be completed every year and any key suggestions that will make a significant improvement to user experience will be considered and accounted for

External Content

- External content hosted by Good Finance will be in keeping with the principles set out and agreed (to follow)
- The primary goal of any external content will remain to add value to charities and social enterprises who are looking to gain information or build knowledge regarding social investment

Content & Events

- All Good Finance content will be data driven
- On a monthly basis, at our KPIs meeting, we will review:
  - Traffic to each blog post
  - Engagement on social media posts
  - Comments & qualitative feedback regarding content
  - Feedback given with regards to events
  - Good Finance content and events will aim data driven whenever and wherever possible, taking on feedback from users and keeping all relevant analytics in mind

Governance

- Good Finance will continue to run steering group and stakeholder group meetings as agreed
- It is important to note however that it is mostly the secondary users that are represented in these meetings
- In the absence of website users, it is important to make sure all relevant analytics, data & qualitative feedback also informs governance decisions

Priorities

- Whilst each area of work will aim to deliver in keeping with good user centered, user experience and user led design principles, each are will also have different priorities with regards to each one
- These priorities are a reflection of how practical & viable and each measure is within the area or work, as well the Good Finance project missions & objectives
- See table below for an outline of priorities for each area of work:

Area of work	Priority 1	Priority 2	Priority 3
Website	User centred	User Experience	User Led
External Content	User centred	User Led	User Experience
GF Content & Events	User centred	User Led	User Experience
Steering Group	User centred	User Experience	User Led
User Insight Panel	User led	User Centered	User Experience