Card Sort Process

1. Describe physical setting. Room logistics, tables, chairs, audio/visual, etc. (do later)
2. Recruit participants (describe later)
3. Prepare content cards
    a. Materials: 3 x 5 white index cards and white sticky labels to fit on cards
        i. Use a MS Word template for creating labels from your computer
        ii. Choose a font that is easily read and make text bold and centered
    b. Create a list of topics that will become card content
    c. Assign each topic a sequential number and a letter that will correspond to the team (i.e., Team A for topic #1 would be called **A-1**)
    d. Write the number of the card and the team letter on the back of the card (i.e., A-1)
    e. Determine the number of people participating in the card sort activity. Divide them into groups of about 5.
    f. Reproduce a set of content cards for each team.
        i. Use the same number that corresponds to the same topic for all sets
        ii. Add the team letter corresponding to each team (Team A, card #1 = A-1, Team B, card #1 = B-1, etc.)
    g. Distribute an identical complete set of cards to each team containing the letter for their team
4. Instruct the card sort participants to write on the large colored stickies for main categories and use a different color of large stickies for sub-categories
5. Show them basically how to construct the cards under each category in a vertical manner
6. Let them know they can use a blank card to write in content that is not available in the card set
7. Let them know they can delete a card if they feel it's not needed
8. Let them know they can re-write the card label if they feel it should be worded differently

During the Card Sort Activity
1. Take photos of the groups while they are discussing the cards
2. One facilitator is available for about 2 teams to answer questions, take notes and keep them on track for time and layout of cards (stickies for categories, vertical layout of cards)

Process After the Participants Complete Card Sort

1. Straighten cards for each team and arrange close together to optimize photo
2. Take photos of each team's card sort. Take multiple shots if necessary when layout is too large. Name each photo sequence with a 1, 2, etc. for larger layouts to make it easier to see order later
3. Upload photos of participants to Google Drive. Identify each photo by the team who created it (Team A, B, etc.)

4. Before physically picking up the cards from the tables to maintain original layout order:
    a. In pencil, name the top level categories from left to right using team letter and category number. (i.e., first category from left called: "#1-cat order", second, #2-cat order, etc.)
    b. In the top right corner on the front of the cards, sequentially number the order they were placed vertically from top to bottom (i.e, 1, 2, 3, etc)
5. If there are sub-categories under the main categories, name them with the same number as the main category, then add a letter. (i.e., sub-category under Cat #1 = 1A, 1B, etc.)

Logistics to consider for card sort exercises:

- Gather more information on the physical room where the card sort will occur
- Keep in mind the acoustics for speaking - is there a need for a microphone?
- Event was held in a very large room with high ceilings making it difficult to hear
- Check out the audio visual resources ahead of time to ensure a good internet/wifi connection, how presentations will be projected and any need for Mac/PC dongals
- Be sure to have audio release forms for participants to sign before the exercise
- Break card sort time into smaller segments (10-15 min) and ask if there are questions
- Instruct participants not to pick up the cards when the exercise is finished - UX does it
- Immediately photograph and pick up cards in an organized fashion - bind cards w/ clips
- Remind participants to use the large colored sticky notes for categories they choose and not to use the actual index cards with labels for categories - choose another color of sticky note for sub-categories