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Building Blocks to a UCD Body of Knowledge
... formerly ...
A Proposed Scheme for Certifying Usability Practitioners

Promoting usability concepts and techniques worldwide

Julie Nowicki
Whitney Quesenberg

UPA Conference 2002




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Activities to date: Certification Working Group

- Salt Lake City meeting
- Public forums at several conferences
 - SIGCHI (ACM's Special Interest Group on Computer-Human Interaction)
 - UPA (Usability Professionals' Association)
 - STC (Society for Technical Communication)
 - UK UPA (UK Usability Professionals' Association)
 - Several user groups and chapter meetings
 - More planned
- Monitored intense discussions on UTEST
- Began work on defining competencies
- The Survey



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UPA Board Decision

- Note that the UPA was a (heavy) participant in the working group. This represents the UPA viewpoint and not necessarily the entire working group.

During the past 9 months, UPA has investigated the need for a certification program for usability professionals. Based on feedback from members and other professionals, the UPA Board of Directors has decided that it is premature for UPA to lead an effort to develop a certification program at this time.

However, this work also produced a strong consensus on related initiatives that would provide immediate value for the profession. Among these is developing a body of knowledge to help usability practitioners grow professionally and help others understand usability better. A body of knowledge might include:

- A list of skills
- Prerequisite knowledge
- Framework of usability life-cycle practices

This body of knowledge could then be used as the basis for a professional development plan, curriculum and self-assessment tools. The UPA is planning to move these initiatives forward.

This work could also provide input to any future efforts to create a certification program. The UPA remains open to participating with other non-profit organizations in such an effort.

Possible Directions for Next Steps (1)

Things that develop foundations that will be valuable, and might lead to certification

Self Assessment

UCD Roles & Career Development

Body of Knowledge

Curriculum

Certification

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International Working Group

- Working group formed at invitation of UPA and met in November 2001 in Salt Lake City
- Goals:
 - Determine whether certification is viable
 - Survey members of key organizations to determine support for certification
 - Understand benefits and drawbacks seen by members
 - If usability certification is viable
 - Determine the criteria for certification
 - Determine the certification process
 - Determine the how certification should be administered
- First meeting documented in article in Interactions
 - "CERTIFYING USABILITY (PROFESSIONALS): A Scheme to Qualify Practitioners" by Donald L. Day, Inuit (with the assistance of Nigel Bevan, Serco Usability Services), January-February 2002, page 7-9

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Stakeholders for Certification

From Salt Lake City meeting - in rank order

- Purchasers of usability services
 - Must hire a usability professional knowing that they are hiring a qualified individual with the proper credentials.
- Usability professionals
 - An experienced usability practitioner
- Usability aware employers
 - Managers who are aware of the positive impact usability professional have on the product's design but want assurance that they are hiring qualified individuals.
- Entry level practitioners
 - New to the usability arena and want to know the type of knowledge and experience they need to be a qualified usability practitioner.
- Usability consultancies
 - A consultant firm who represents themselves as having expertise in the usability practitioner space.
- Usability training organizations
 - A training firm who trains usability practitioners on various usability methodologies.

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Work on Competencies

- SLC meeting agreed to use ISO 13407 as a basis for developing the competencies, and to build on the UK work
- This would be a UCD certification
 - But we continue to call it a Usability Certification - and this can cause confusion on several levels
- Issues
 - Does a usability professional need to know the whole scope of 13407?
 - What level of design knowledge is required?
 - How senior a person are we certifying - entering practitioner or experienced professional?
 - ISO 13407 v. ISO 18529
 - Organizational v. individual competencies
 - Can you reliably assess fuzzy competencies?
 - Driven from the UK

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Technical Competencies

1. Plan and Manage the Human-Centered Design Process
2. Understand and Specify User and Organizational Requirement and Context of Use
3. Produce Design Solutions
4. Evaluate Designs Against Requirements
5. Demonstrate Professional Skills

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Skills Framework for the Information Age

- The SFIA is used as a model for structuring levels of competencies
 - A common reference model for the identification of skills
 - All skills mapped in two dimensions
 - The complete IS model maps to a British Computer Society model


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COMPETENCIES 10

Levels of Competency in the SFIA

Level	Status (interpretations)
1 Follow	Student or Trainee
2 Assist	
3 Apply	Practitioner
4 Enable	Professional
5 Ensure, advise	
6 Initiate, influence	
7 Set strategy, mobilize	

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Survey

Whitney Quesenberg
Caroline Jarrett

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Background

- From April 18 - May 31, 2002, the UPA sponsored a survey to collect feedback on attitudes towards certification for usability professionals.
- Survey was publicized:
 - Through an email blast to UPA members
 - On a popular usability list
 - On the STC Usability SIG list
 - London Usability List and UK UPA List
 - Through other European lists
- The survey included 29 questions, with 8 qualitative request for comments.
- There were 975 responses

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A cautionary note

- This is a sample of people taking an active interest in usability as evidenced by UPA membership and participation on a usability-related list
- It is not a random sample, but the sheer size and number of comments lends weight to the responses.

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Goals of the Analysis

- Look at responses to the qualitative comments
- Identify common themes among them
- Report to the Certification Core Group and the UPA Board
- We looked for
 - Patterns in the responses that might provide insight into correlation between expressed attitudes and demographics
 - Perceived barriers - hurdles that certification must overcome
 - Insights into what makes this issue so contentious in the community

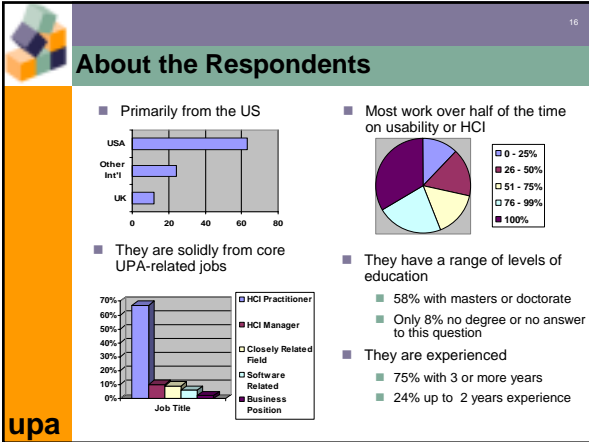
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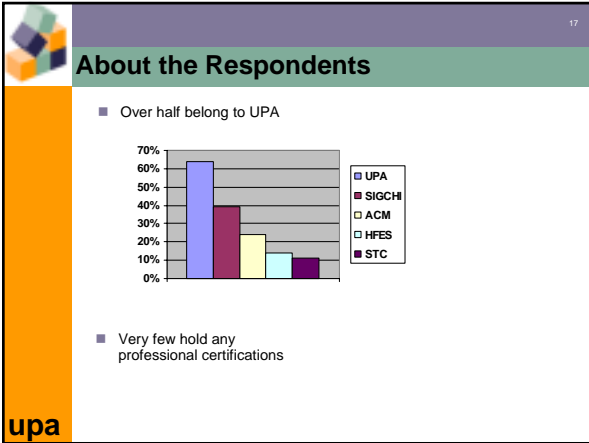
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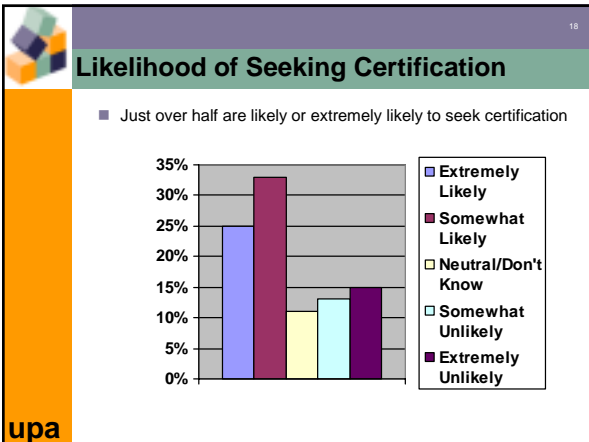
Key Take-Aways

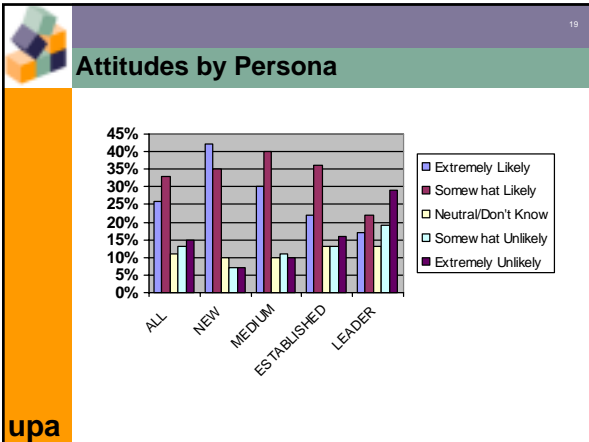
- Attitudes towards certification are ambivalent
 - In answer to "Would you seek certification" - 58% likely or very likely; 11% neutral and 28% unlikely or very unlikely
 - Neutral responses often have over a third of the total, suggesting that those who are unsure are the "silent majority" in this discussion.
 - Those opposed to certification tend to be adamantly against it, however, as reflected in their comments.
 - Neutral views and opposition existed in every sub-group of our respondents, but are a smaller proportion of those who are new to the field or not holding a degree in HCI or a closely related field.
- Governance and the content of any certification is a key issue
 - Many comments expressed an attitude either explicitly or implicitly that certification is simply a way for consultants to make money.
 - There is a lot of diversity of opinion on what a certification should consist of and how it should be assessed.

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- ### Themes
- Themes are based on the qualitative analysis
- Value to Customers (40 comments)
 - Value in Hiring and Self-Promotion (25)
 - Value of Certification in the Profession (197)
 - Value for Those Entering the Field (79)
 - Defining the Field (138)
 - The Certification Process (126)
 - Education v. Experience (149)
 - Opinions For and Against Certification (93)
 - Project and Process (205)
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Theme: Value to Customers

- The strongest opinion was that customers – companies, managers and hiring agents – do not care about certification.
- Another group of comments also looked at the need for good promotion and a critical mass for success - acceptance affects the value of any certification.

Looking at these comments reminded us that we've looked at the usability profession's views on the value to our customers - not at the customers' views, although there were some managers and others who hire. If we want to know more about the value of certification to customer-stakeholders, we need to do the research to ask them directly.

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Theme: Value in Hiring & Self-Promotion

- Relatively few comments on this theme
- Agreement that certification would "look good on a resume" and might be an additional factor
- Individual issues -
 - Extra credentials
 - Comparing credentials
 - Low value for academics



Theme: Value of in the Profession

- Some felt that certification is a critical step in gaining legitimacy and recognition.
- Others felt - often strongly - that there was a strong danger of damage to the profession by premature codification of standards or in the divisive nature of the debate.
- A few comments felt that certification is less prestigious than not being certified, based on their perception of other IT or software certifications.
- Individual issues -
 - Builds legitimacy and credibility
 - Raise standards in profession
 - No guarantee of quality
 - No value or benefit
 - Potentially harmful or divisive



Theme: Value for Those Entering Field

- Comments related to the impact of certification to those entering the field were in three groups.
- The largest feared that it would create a barrier to entry, while a smaller number felt it would help those seeking to enter the field by establishing criteria.
- There was also a group that felt its most important value was in self-assessment and establishing standards.
- Individual issues -
 - Barrier to entry
 - Alternate route to establish credentials
 - Value is in self-assessment
 - Must not be too easy

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Theme: Defining the Field

- These comments surround the underlying need to define the field, and the problems in doing so.
- Many of the opinions express a strong ambivalence about certification, whether they ultimately are in favor or not.
- The comments also express a great deal of fear that this effort could be harmful, overlapping with similar comments in the Value to the Profession theme.

- Individual issues -
 - Need to define core skills
 - Field too undefined at this point
 - Could restrict creativity
 - Field too broad

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Theme: The Certification Process

- Comments on the certification process are widely varied, in part because this survey was not accompanied by a specific proposal.
- This theme focuses on issues in the certification process that were of most concern to respondents – there is a separate section later on the problems in responding to an abstract concept.
- The "downsides" questions show a strong concern about costs and relative benefits.

- Individual issues -
 - Costs
 - International Recognition
 - Code of Conduct
 - Process and Related Issues

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Theme: Education v. Experience

- An overwhelming number of comments in this theme relate to the opinion that experience is more important than educational credentials.
- There were, however, a strong minority of comments that a degree should matter more.
- Others believe that any certification should be created in close association with a degree program or curriculum

- Individual issues -
 - Need links between certification and degree programs
 - Degrees more important than certification or experience
 - Experience more important than degrees

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Theme: Project and Process

- There were a large number of comments that offered opinions and advice on the survey, the project as a whole, and UPA's involvement in certification.
- UPA members closely match the overall sample
- Advice on the survey was about 1/3 positive - average for a survey and actually good for this audience
- Individual issues -
 - Don't compete with existing schemes
 - Don't emulate existing certifications
 - Governance and control

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Moving Forward...

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Certification is not the only outcome

Things that develop foundations that will be valuable, and might lead to certification include:

Self Assessment

HR Resources: Job Definitions

Curriculum

Certification

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Next Step Activities...

- Working group meeting July 9, 2002
- Reviewed activities so far, outcomes, UPA board decision
- Developed 6 new activities:
 1. **Pamphlet to lay groundwork for BOK (Body of Knowledge)**
 - "What a UCD r does" or some such
 - Build on existing ISO-13407/18529 resources
 - Create digestible language in an attractive and meaningful visual format
 - Sub-activity: gap analysis (ethics, empathy, accessibility, localization...)
 - Caroline Jarrett & Nigel Bevan
 2. **Annotated bibliography**
 - "Getting started in UCD" or some such
 - Chauncey Wilson

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Next Step Activities...

3. **Plan for and define the BOK**
4. **Catalog courses and degree programs**
 - Annotated
 - Research details in preparation for developing UCD curriculum
 - Julie Nowicki
5. **Define roles for practicing UCD**
 - Will eventually lead to additional professional development activities
 - Whitney Quesenbery
6. **Code of Conduct for people practicing UCD**
 - Chauncey Wilson

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Your turn

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