Accreditation of Usability Professionals

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Abstract

There is increasing demand for professional recognition of usability expertise, to give status to professionals in the area, and to enable potential employers and clients to identify people who are competent in the field. Proposals for usability accreditation were first developed by the EU INUSE project in 1997, and these formed the basis of subsequent UK-based initiatives to establish usability accreditation. The EU UsabilityNet project worked with an international group to develop the proposals into an international scheme that was announced in April 2002. Feedback was collected through a web questionnaire and sessions at several international conferences. The web survey showed that while 77% of people new to the field would seek certification, only 39% of the most experienced would do so. At this point, the major US sponsor withdrew for financial reasons, and the Usability Professionals Association that was supporting the project concluded that it did not have the resources to go it alone with a controversial accreditation programme. Support for usability accreditation remains strong in Europe, and the preferred European approach would be to develop usability accreditation as part of a professional development scheme.

1   Why usability accreditation?

The possibility of usability accreditation has been discussed for several years. The potential advantages and disadvantages for potential stakeholders were identified at an international workshop in 2001 (Day & Bevan 2002).

1.1   Purchasers of usability services

Advantages: Provides criteria to choose a service provider, requires less expertise on part of purchaser to make decision, helps justify decisions to management, likelier to get better services resulting in a higher quality product.
Disadvantages: Needs to be properly advertised and managed, a certified person will cost more, could stifle innovation, guarantees mediocrity.

1.2   Usability professionals

Advantages: Provides status and a level of authority, promotes accepted values within the profession, makes moving job easier, will command a higher salary, helps define a career path
Disadvantages: Does not distinguish between the newly qualified and the very experienced, will need time, effort and money, will not cater for the specialist, could homogenise the profession.

1.3   Usability aware employer

Advantages: Encourages development of less experienced employees, provides criteria to select a new employee, helps justify decisions about hires, lowers the risk of selecting an inappropriate

employee, a certified employee will need less local training, easier to identify training requirements, can be part of a reward/compensation package, provides a basis for differentiating employee expertise, provides guidance for professional development.

Disadvantages: certified employees will expect a higher salary, the employer may be expected to pay for certification and training, leaves less latitude for personal judgment, may focus only on certification and not on other relevant skills.

1.4 Entry level practitioners

Advantages: Provides something to aspire to and guidance on skills required, provides self-evaluation standard, gives status, makes the subject more meaningful, helps decide "should I go into this field?"

Disadvantages: Costly in money and time, the employer not as likely to pay, provides a barrier to entry to field

1.5 Usability consultancies

Advantages: easier to gain credibility, provides differentiation to competitors

Disadvantages: cost to get employees certified, may result in higher staff turnover, more difficult to retain staff, consultancy fees will need to go up.

1.6 Training organizations

Advantages: easier to get students (marketing), may increase business of certified courses

Disadvantages: must meet standards (could be costly), cost of certification

Pos/Neg: defines a program for training

1.7 Lower priority stakeholders

Other potential stakeholders include end users, project managers, executives sponsors of usability professionals, academic teachers, professional organizations, industry usability trainers, students in academic programs, project team, and legal professionals (liability).

2 European and UK initiatives

2.1 INUSE scheme

One of the outputs of the EC INUSE project was a proposed scheme for accreditation of usability support providers (Bevan et al 1998). It included assessment criteria derived from the usability maturity model proposed by Earthy (1999) (this later formed the basis for ISO TR 18529). The scheme was validated by assessing the capability of the INUSE project partners, but no further use was made of the scheme at that time.

2.2 British HCI Group scheme

Jonathan Earthy then worked with the British HCI Group to develop a proposed lightweight scheme of self-certification (BHCIG 2001) that received significant support from British HCI Group members. Companies or individuals who feel they meet the criteria would attest competence in one or more of seven areas: usability consultancy, planning user centred design, evaluation and testing; and the optional specialist competencies: requirements engineering, product design support, training courses and technology transfer. When accredited the company or individual could claim these competencies in communications with customers.

The British HCI Group is currently investigating whether HCI competence can be incorporated into the BCS curriculum and professional development and professional membership schemes.

2.3 UK UPA scheme

Another proposed scheme was developed, based on the same INUSE competencies, but with procedures modelled on those used by the British Computer Society to assess candidates for professional membership. The UK UPA also surveyed its members, and found that 77% of those replying were in favour of an accreditation scheme, and the majority were in favour of a formal international scheme rather than the self-certification proposed by the British HCI Group.

3 International workshop

In the USA, Surgeworks, which has participated in a DSDM certification scheme, hosted an international workshop jointly sponsored with the UPA to discuss setting up a usability certification scheme. There were 13 participants at the workshop, including Nigel Bevan and Jonathan Earthy from the UK, Masaaki Kurosu from Japan and 10 US representatives from industry, government and academia. The UK submitted an agreed position on accreditation based on the outcome of a meeting between representatives of the British HCI Group, UK UPA, Ergonomics Society, IEE and with European input from the EU UsabilityNet project (www.usabilitynet.org).

3.1 Workshop conclusions

The workshop accepted all the European inputs, and reached the following conclusions.

3.1.1 Criteria for certification

The preferred approach is to define core competency complemented by elective specialities. The scope of assessment will be user centred design, and the assessment criteria will be derived from the "Technical competencies for User Centred Design professionals" document (Earthy et al 2002) submitted by the UK. The core competencies are expected to be:
- Plan and manage the human-centred design process
- Understand and specify user and organisational requirements and context of use
- Produce design solutions
- Evaluate designs against requirements

Jonathan Earthy and Nigel Bevan (with support from UsabilityNet) will be responsible for developing a strawman model including pass and fail criteria for each competency item for typical personas seeking certification.

3.1.2 Certification process

The suggested elements are:
- a points system to assess eligibility based on education and experience (there was little enthusiasm to accredit training courses in the US in the first phase)
- submission of material describing use of UCD on a project. The DSDM model of a 2000 word explanation of how and why UCD principles has (or has not) been applied was favoured.
- submission of structured peer references
- a possible written exam composed of problem-solving questions
- a structured interview

3.1.3   Certification body

Assessment should be operated by a not-for-profit consortium including representatives of professional bodies and major companies, and the scheme should be operated internationally.

4   Consultation

UsabilityNet then organised several workshops in London to further refine and develop the definition of competencies, in conjunction with the US group. The proposed scheme was announced in April 2002, and feedback was collected through a web questionnaire and sessions at several international conferences.

The web survey (UPA 2002) showed that while 77% of people new to the field would seek certification, only 39% of the most experienced would do so. Strong opinions, both in favour and against certification were expressed on a number of themes (Table 1).

Theme: Value to Customers • Low value to managers • Value to consultants • Acceptance affects value	Theme: Value in Hiring and Self-Promotion • Extra credentials • Comparing credentials • Low value for academics
Theme: Value of Certification to the Profession • Builds legitimacy and credibility • Raise standards in profession • No guarantee of quality • No value or benefit • Potentially harmful or divisive	Theme: The Certification Process • Costs • International Recognition • Code of Conduct
Theme: Value for Those Entering the Field • Barrier to entry • Alternate route to establish credentials • Value is in self-assessment • Must not be too easy	Theme: Education vs Experience • Need links between certification and degree programs • Degrees more important than certification or experience • Experience more important than degrees
Theme: Defining the Field • Need to define core skills • Field too undefined at this point • Could restrict creativity • Field too broad	Theme: Project and Process • Don't compete with existing schemes • Don't emulate existing certifications • Governance and control • UPA's involvement in this project • Comments on the Survey

Table 1: Survey comments

Common fears expressed were that: accreditation would be a barrier to entry to the profession, would exclude people who had been in the field for years, would cause a rift between the haves and the have nots, would be a barrier to innovation and would stipulate the usability methods to be used. Experienced professionals were the most voluble in their criticism of certification in responses to the survey, and in email discussion groups. They were particularly concerned that it might challenge their established expertise.

Many of the concerns were a misunderstanding of the proposed scheme, but at this point, the major US sponsor, SurgeWorks, withdrew for financial reasons, and the Usability Professionals Association concluded that it had neither the financial nor people resources to go it alone with a controversial certification programme.

5 The future: a professional development scheme

Usability accreditation is on the agenda of the European Usability Forum (Tscheligi et al 2003) set up by UsabilityNet. In the mean time other organisations are taking the initiative with their own narrower schemes, e.g. usability certification awarded by HFI (www.humanfactors.com) in the USA, and the SFIA (www.e-skills.com) definition of system ergonomics in the UK.

Many people regard professional usability accreditation as inevitable in the long run, but it is likely to be more acceptable in Europe if it forms part of a professional development scheme. As an individual progresses in their career they need to acquire two complementary types of skills:
1. technical capability, for example to apply user centred design methods
2. general professional skills that are acquired by practitioners with increasing responsibility

The technical skills for a usability professional are generic, and are defined by a set of levels, for example:
1. Assistant practitioner undergoing training and becoming familiar with the scope of their tasks
2. Trained practitioner familiar with the scope of their tasks, working under supervision with specific instructions
3. Professional. Selects appropriately from applicable standards, methods and tools. Supervise others. Decisions influence success of projects and team objectives.
4. Senior practitioner. Full accountability for their own technical work or project/supervisory responsibilities. Receives assignments in the form of objectives. Establishes own milestones, team objectives and delegates assignments.

Professional development can then be defined as a combination of:
1. Acquiring the necessary technical skills (through education, training and experience)
2. Gaining the professional skills (through training and experience) to apply the technical skills at increasing degrees of responsibility.

A professional development scheme for usability professionals would enable an individual and employer to track the individual's progress in gaining both technical and professional skills, with the objective of becoming an accredited professional.

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