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UPA in 2005-2006: Chapters, Projects, Committees and other Activities

A Report from the Board of
Directors
January 20, 2006
Broomfield, CO

Promoting
usability
concepts and
techniques
worldwide



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UPA Goals

The Usability Professionals' Association supports usability specialists, people from all aspects of human-centered design, and the broad family of disciplines that create the user experience in promoting the design and development of usable products. Our goals are to:

- **Provide an international network** through which usability professionals can share information about the techniques and methodologies in the profession.
- **Create an inclusive community** for those interested in usability, whether it is their primary focus or a related discipline.
- **Change new product development processes** to include a concern for the people who use them by presenting the business case for usability in product development to colleagues, customers, the public and governmental agencies.
- **Increase the body of knowledge** about usability and user-centered design through professional education, meetings and conventions and other professional interchanges

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Board Goals for 2005-2006

- Focus on the value of UPA membership to increase the number of memberships by both retaining existing members and recruiting new members.
- Create more effective communications and more opportunities for participation and feedback.
- Strengthen and deepen the UPA community

These goals are used to guide our decisions about projects and activities.

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Treasurer

Whitney Quesenberg & SFA



Treasurer Report

Accomplishments 2005

- **We're back in the black!**
A strong 2005 conference, and good control on spending produced a net income of \$75,000.
- **We're maintaining and building our reserve**
The reserve fund is our insurance against pre-committed expenses. UPA policy (10.3) calls for a minimum reserve of \$400,000. We end 2005 with a reserve of \$540,000.
- **We have strong sponsorship**
Adding World Usability Day to our sponsorship options brought new sponsor income to \$46,000, strongly over budget.
- **New projects meant new spending**
We were slightly over budget for expenses, all attributable to new activities.



Treasurer Report

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Goals for 2006

- **Continue to operate in the black**
Budget prudently, using our income from 2005 wisely, and balancing our expenses against income
- **Use expenses to meet strategic goals**
We continue to under-spend on membership, chapters and professional development.
- **Review financial operations**
Help board stay aware of ongoing finances, use online systems to streamline reporting, and meet best practices for association management
- **Maintain income**
Support job bank, consultants directory, UPA store, membership and conference – our income-producing activities

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Office Management Report

John E. Kasper, PhD, CAE
Ed Grochowski

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Accomplishments 2005

In conjunction with the volunteer leadership of UPA:

- membership has increased from 2001 to 2168;
- the 2005 Annual Conference exceeded its expectations in terms of registration, having 520 participants;
- UPA continued to meet or exceed its financial projections;
- UPA completed another successful audit;
- UPA continued to meet the needs of the voluntary leadership and members;
- UPA became much more active in membership recruitment and retention, working with other organizations, and in its outreach activities, e.g, WUD.



Membership/Sponsorship

Paul Sherman



Memberships & Sponsors

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2005 Metrics

- Not a bad year...
- Members:
 - Added 167 members (2,001 → 2,168)
 - Past three years: around 5 – 10% annual growth rate
- Sponsors:
 - Combined 35K, from “regular” and WUD sponsors
 - Downtick from prior years: legends abound of 50-60K...

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Memberships & Sponsors

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Goals for 2006:

- Increase new members
 - Awareness of benefits
- Retain existing members
 - Calls for membership survey
- Increase sponsorship
 - Update sponsorship model to:
 - Include organizational and corporate sponsors
 - Include World Usability Day
 - Begin by contacting previous sponsors now

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Chapters

Dave Mitropoulos-Rundus



UPA Chapters

Chapters Overview

- | | | |
|-----|-------------|-------------------------------------------------------|
| 1. | Canada | Quebec, Montreal |
| 1. | Canada | Ontario Toronto |
| 2. | China | China Chapter |
| 3. | China | Hong Kong |
| 4. | Germany | |
| 5. | India | Pune |
| 6. | Italy | Turin |
| 7. | New Zealand | |
| 8. | Scotland | |
| 9. | Singapore | |
| 10. | Sweden | Linkoping |
| 11. | Switzerland | SwissUPA |
| 12. | UK | |
| 13. | USA | California Bay Area |
| 14. | USA | California San Diego |
| 15. | USA | Illinois Chicago |
| 16. | USA | Pennsylvania Delaware Valley |
| 17. | USA | Indiana |
| 18. | USA | Massachusetts Boston |
| 19. | USA | Michigan |
| 20. | USA | Minnesota |
| 21. | USA | New Jersey |
| 22. | USA | New York New York City |
| 23. | USA | North Carolina Research Triangle |
| 24. | USA | Ohio Northeast Ohio (NEO-UPA) |
| 25. | USA | Texas Austin (Austin UPA Chapter) |
| 26. | USA | Texas Dallas/Fort Worth Metro Area Chapter of the UPA |
| 27. | USA | Washington D.C. |





UPA Chapters

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2005 Review

- Added two new chapters
 - India-Pune
 - USA-North Carolina (Research Triangle)

- Created chapter starter/UPA membership incentive package for chapters in-formation
 - Showcases UPA collateral
 - Usability book
 - UX Magazine
 - Membership registration form
 - It's All About U

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UPA Chapters

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Goals for 2006

- Profile
 - 2005 chapter finances/membership/activity survey
 - Report at June Board and Chapter Leaders

- Grow
 - 5 new chapters

- Repair
 - Address chapters going dormant
 - Address predatory behaviors (collaboration encouraged!)
 - Address chapter branding

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UPA Chapters

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Goals for 2006

- Maintenance/Improvement
 - Revise bylaws and charter
 - Promote standard site template for new chapters
 - Competition for site template

- Create UPA Membership Incentive package for ALL chapters
 - Build upon new chapter package

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Professional Development (Body of Knowledge) Nigel Bevan

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Body of Knowledge

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Accomplishments 2005

- The BoK working group held biweekly conference calls throughout 2005
- Authoring templates created, tested, reviewed, and refined for metadata and content
- Preliminary content outlines for Methods, Organizational, and Design
- Editorial guidelines created and refined
- 26 experts recruited for authoring and reviewing
- The BoK Preview Site was designed and developed
 - The purpose is to help publicize the BoK project, introduce the types of subjects that will eventually be included, gather feedback from a broader community, and solicit volunteers.
 - The Preview Site contains: 8 methods, 5 design topics, 4 organizational topics, 28 glossary definitions, related fields, and brief summaries of future content on professional development ...

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Body of Knowledge

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Goals for 2006

- Formalize the structure of the BoK group as an editorial board
- Feedback Collection/Survey
 - The first BoK survey is almost ready for release
 - The UPA Board will be invited to pilot the survey
- Content
 - Refine the content templates
 - Continue content authoring, editing, and review
 - Develop a content management system to support the authoring, editing, and review process
- Develop list of university and professional courses (Peter?)
- Gather additional feedback at the UPA conference
- Design final BoK
- Formalise relationship with IPGems

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Publications

Kerrie Green



Publications

Accomplishments 2005

- Voice
 - Added new Editor in Chief
 - Special WUD issue (12 articles)
 - Established regular Thumbnails column (Cliff Anderson)
- JUS
 - Editorial board established
 - First issue released November 2005
 - Design solidified
- UX
 - Renewed contract with Lexicon; new vendor met all targets
 - Addition of more international editorial board members
 - Special WUD issue
 - Leveraged DUX connections to obtain UX articles
 - Added two art editors and an assistant managing editor



Goals for 2006

- Voice
 - Establish stronger article pipeline
 - Create another regular column that solves one usability problem per issue
 - Revamp submission requirements on UPA site
- JUS
 - Establish subscription mechanism or RSS feeds
 - Grow submissions and generate industry interest
 - Establish editorial process to better track submissions and versions
 - Obtain editorial assistance (est. \$6k annually)
- UX
 - Revisit subscription model and online access
 - Increase ad revenue
 - Increase ratio of international editorial board members
 - Special panel/meeting at 2006 conference



Web

Whitney Quesenbery



Goals for 2006

- Streamline management of our “web estate”
Documents assets, consolidate management, document conference web tools and set up annual contracts
- Better member access to information
Get the members-login solved (finally). Add RSS feeds for new content and publications.
- Improve Jobs, Consultants and Member Directory
Data-driven model, instead of authored pages. Add interactive forms for chapters and other office functions.
- Expand Usability Resources content
Coordinate with BOK metadata, cross-index to STC Topics, index publications by topic, move articles and conference materials online in members-only area.
- Refresh the design
Based on brand values work, update the visual design, clean up technical implementation



Voting and
Design for Democracy
Whitney Quesenbery



Design for Democracy

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Accomplishments 2005

- **EAC Research Contract**
Design for Democracy began a contract to create templates for ballot designs, signage and the National Voter Registration Form. The staff includes UPA members at Frog Design.
- **NIST Guidelines Contract**
D4D wrote ballot design guidelines (complementing language guidelines by Redish & Associates) under a resolution by the TGDC.
- **Ethics Guide for Elections Consultants**
D4D adopted an ethics guide for design and usability consultants working on elections, which extends UPA and AIGA Codes.
- **Voluntary Voting System Guidelines approved**
The EAC approved VVSG 2005 based on the work of the TGDC. Now, we are working on new sections and performance baselines.
- **Progress and contacts in the UK**
Louise Ferguson was invited to a symposium for London Elects, and continues to make good UK contacts.

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Design for Democracy

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Goals for 2006

- **Regional Experts Training**
D4D is training both professional experts and election officials. Dana Chisnell, Josie Scott, and Louise Ferguson are UPA members included in the first training sessions
- **Consultants List**
We will ask all consultants listed on the voting list to agree to the Ethics code. Experts trained by D4D will receive special mention in the list.
- **Usability Testing for Election Officials**
(Delayed from 2005) This project will create a guide to quick usability checks of ballots and signage before each election, designed for use by election officials.
- **Usability Advocacy and Communication**
Continue to publish articles, both for UPA members and for the broader election community.

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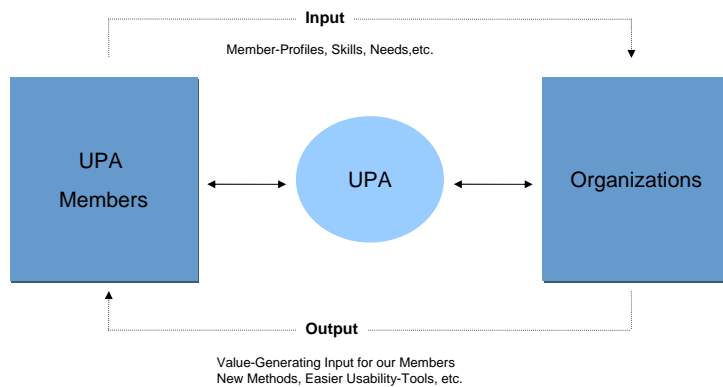
Organizational Outreach

Silvia Zimmermann



Organizational Outreach

Overview

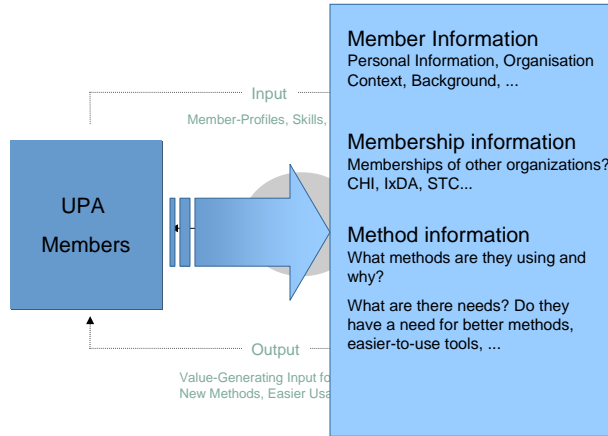




Organizational Outreach

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Overview



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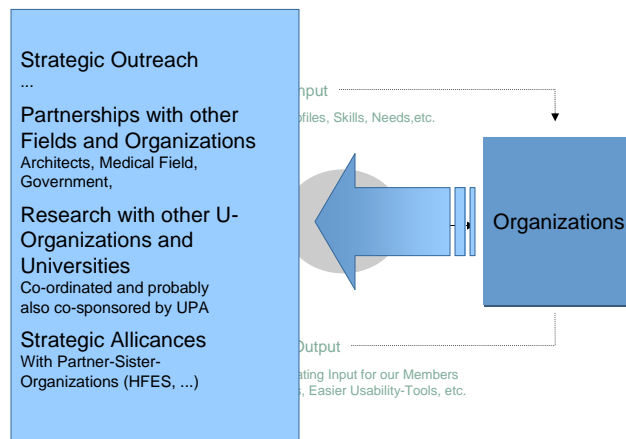
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Organizational Outreach

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Overview



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Organizational Outreach

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New initiative - rationale

- To spread the overall UPA notion
- To strengthen UPA's paradigm
- To create more effective communications with sister-organizations
- To enter strategic alliances with other usability organizations
 - Similar to: Strategic partnership with AIGA in Design for Democracy.
- To enter strategic alliances with industry partners and universities
- To provide input to research organizations and universities
- To implicitly increase the number of UPA chapters and UPA members

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Organizational Outreach

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Goals for 2006

- Sign-off and agree on UPA Organizational Outreach strategy
 - Purpose and Goals, Rationale, Qualifying Organizations, Implementation Schedule, etc.
- Run detailed UPA-Member Survey
- Enter alliances with sister organizations at a strategic level
- Enter alliances with sister organizations at a country and/or non-strategic level
- Initiate and/or participate in research projects and/or conferences and events
 - e.g. MAUSE (Maturity of Usability Evaluation Methods)

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UPA Marketing & Branding

Lyle Kantrovich
Director of Marketing

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techniques
worldwide



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Topics

- Shared understanding of marketing & branding
- UPA Marketing & Branding goals
- Relationship to other board roles, committees, etc
- Proposed Marketing plan
- Budget items
- Critical Success Factors (what I need from you)

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Our Brand is...

...the proprietary **visual, emotional, rational, and cultural image** associated with our organization and services...it largely exists in people's minds.

...something that, if people remember it and have positive associations with it, **makes selecting our association or services easier and differentiates us from our "competitors"**.

Positive brand associations enhance the value and satisfaction people get from our organization and services.

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Our Brand Includes

- Our Name(s)
 - Usability Professionals' Association
 - UPA
- URLs (e.g., www.usabilityprofessionals.org)
- Slogans / Taglines
 - "Promoting usability concepts and techniques worldwide"
 - "Making It Easy!"
- Logos
- Other visual elements (e.g. color schemes, photography, etc.)
- Set of expectations people have of our organization and our services
- Sub-brands (e.g. JUS, WUD, User Experience, UPA the Conference)

Think about which of these we control, which are easy to change, and which matter the most.

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Proposed Marketing & Branding Goals

■ Branding

- Understand our current brand positioning
- Establish key brand messages
- Increase brand awareness (through marketing)
- Establish brand consistency through education & communication (internally)

■ Marketing

- Coordinate and advise on marketing across the organization
 - Support efforts of UPA Committees and Projects
 - Help UPA Chapters market
- Establish a repository for collateral and reusable assets
- Increase UPA's "market share"



Marketing Plan 2006-2007

- Form a Marketing Committee (3-5 people)
- Have a branding firm conduct a brand audit & recommend next steps for branding (foundational / strategic)
- Collect collateral & assets from UPA & Chapters
- Build online repository for assets (infrastructure)
- Develop key collateral as needed (tactical)
- Revise brand guidelines as needed (infrastructure)
- Advise on branding and marketing for web, WUD, UBoK, pubs, etc. (tactical)
- Collect/establish and report on marketing measurements (strategic & tactical)



Who Are We – Official UPA Version

- "Founded in 1991, the original 50-member Usability Professionals' Association has grown to serve a community of more than 2100 members worldwide by promoting usability concepts and techniques through its publications, conferences, and local chapters."
- "The Usability Professionals' Association supports usability specialists, people from all aspects of human-centered design, and the broad family of disciplines that create the user experience in promoting the design and development of usable products."



Members – Official UPA Version

- "UPA members work in corporations, government agencies, not-for-profit organizations, and independent consulting practices. They practice usability by engaging in: Software and web development and management, Usability testing and engineering, User-centered design, Information architecture, Technical communication, User research"
- "UPA members come from many different backgrounds, meeting in the common ground of a shared interest in creating products that meet the needs of the people who work or play with them. Some work full-time as usability specialists. Others incorporate usability into their work as interface/interaction designers, information architects, ethnographers, web design, communicators and many other fields."
- "Usability practitioners shall ensure that their work meets the Ethical Principles laid out in this code of conduct. Usability practitioners shall report any violations of this code of ethics to the Vice President of the Usability Professionals' Association. A review of the allegations will be conducted by the UPA Ethics Advisory Committee. Violations of this code may lead to expulsion from the Usability Professionals' Association."



Our Goals – Official Version

- **Provide an international network** through which usability professionals can share information about the techniques and methodologies in the profession.
- **Create an inclusive community** for those interested in usability, whether it is their primary focus or a related discipline.
- **Change new product development** processes to include a concern for the people who use them by presenting the business case for usability in product development to colleagues, customers, the public and governmental agencies.
- **Increase the body of knowledge** about usability and user-centered design through professional education, meetings and conventions and other professional interchanges



Students and Young Professionals Peter Picone



Students/Young Professionals

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New initiative - Rationale

- Outreach to wider audience
 - New Blood
 - Smooth transition to full membership
- Build strong sense of community early in professional development
- Functional crossover between Chapters / Membership and sponsor development
- Concurrent strategies
 - Needs based recruiting model for students
 - Incentivised retention model for transitional period to young professional

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Students/Young Professionals

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Goals for 2006

- Formalize the program basics
 - Structure / Contacts / Approach / Incentives
- Incubator project in a single geography
 - Boston / NY or other active market
- Expand once lessons learned are understood
 - x new student / young professional members
 - x new student chapters

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World Usability Day

Elizabeth Rosenzweig



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World Usability Day
3 November, 2005 • Making It Easy!

World Usability Day

Accomplishments for 2005

Exceeded sponsorship goals

- Goal: 12,000
- Final sponsorship 17,995

Exceeded event goals

- GOAL: 8 local events, two continents
- Final Number: 6 continents, 35 countries, 115 local events
- 36 hour day with a rolling timeline of events

Major Media Coverage

- USA Today, section cover article
- CNN Headline News, 3 minute spot
- Israeli Television, short news spot
- Radio interviews on morning talk shows in 2 hemispheres (Sydney Australia, San Francisco, California and Seattle, Washington)
- Local coverage all around the world



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3 November, 2005 • Making It Easy!



World Usability Day

Accomplishments for 2005

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- [World Usability Day](#) - sponsor: Ulrichley
- [O'Reilly Developer Weblogs](#), Nov 2 - Online
- [Usability question comes of age](#)
- [The Hindu](#), Nov 5 - India
- [Komfort bei Gerätebedienung im Mittelpunkt \(Focus on Convenience online\)](#), Nov 4 - Germany
- [Steuerfrei für mehr Benutzerfreundlichkeit \(Advocacy for Usability\)](#) Deutschlandfunk, Nov 5 - Germany
- [Wenn die Schelle zur Plage wird \(If Technology Becomes a Plague\)](#) Der Tagespiegel online, Nov 4 - Germany
- [Alles Wahne auf dem Lärmus](#) Neues Deutschland, Nov 5 - Germany
- [Bedienungsfreundlichere Geräte](#) MittageMagazin - Nov 3 - Germany
- "World Usability Day" today
- [The Hindu: Tamil Nadu/Chennai News](#) - Nov 3 - India
- [Varcho full av teknisk tillgängs special dag](#) - Annika Berge
- [Sveriges Radio](#), Nov 3, 2005 - Sweden
- Local press and radio also covered the event.
- [Why are tech gnomes so hard to figure out?](#) - Ed Baig
- [USA Today](#), Nov 2, 2005 - USA
- [The Secret of Making Things Work](#) - Max Gafney
- [BBC](#), Nov 1, 2005 - UK
- [Pushing the right buttons requires a human touch](#) Sydney Morning Herald, Oct 31, 2005 - Australia
- [event page | more on the fly in the virtual event page | more on the fly in the virtual event page](#)
- [Varcho full av teknisk tillgängs special dag](#) Sveriges Radio P1, Nov 3 - Sweden
- [Better Design From The Usability Pros](#) - Kathleen McGinn-Spring
- [US 1 Newspaper](#), Nov 2, 2004 - New Jersey, US - [event site](#)
- [Why easy to use is not enough](#) BBC, Nov 1, 2005 - UK
- [Usability events are just a start](#) BBC, Oct 31, 2005 - UK - [event page](#)
- [World Usability Day in Countdown N](#) Go to 7:40 in the video stream
- [CommuniON, Episode # 19](#), Oct 24, 2005 - Online
- ["World Usability Day" aims to make technology more user-friendly](#) by David Sheets
- [St. Louis Post Dispatch](#), Oct 28, 2005 - USA - [event page](#)
- [World Usability Day: "Making It Easy" for Technology Users](#) Garth A. Buchholz
- [Peachpit Press](#), Sep 23, 2005 - Online
- [World Usability Day - 3 November 2005 - Making It Easy](#) MoneyWeb, Oct 18, 2005 - Johannesburg, SA - [Event Web site](#)
- [World Usability Day on Google Maps world events](#)
- [GoogleMapsAlert](#), Oct 17, 2005 - Online
- [WorldUsabilityDay.org: A case study and CivicSpace recipe](#) (Oct 17, 2005)
- [UXnet - World Usability Day collaboration](#) (Oct 8, 2005)
- [IBM Ease of Use Newsletter](#) (Oct 2005)



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World Usability Day
3 November, 2005 • Making It Easy!



World Usability Day

Goals for 2006

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■ Key Strategies:

1. Develop a leadership team with well-defined roles and responsibilities.
2. Develop well-defined benefits and boundaries of sponsor relationships.
3. Develop a strongly integrated marketing program that builds the brand.
4. Develop a procedure for local event development that inspires participation, provides strong incentives for early planning, and supports locals efficiently.
5. Build on the strengths of the websites, and enhance their usability.
6. Develop an appropriately visible position and organization for the accessibility segment.

■ Criteria for Success:

1. 135 events, 35 countries
2. Media Coverage that equals or exceeds 2005.
3. 2 Organizational collaborators.
4. Sponsorship goal 25,000 minimum.



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Conference DeeDee DeMulling Carol Smith



Conference 2006

Goals for 2006

Host an annual event to share, motivate and learn from one another.

Revenue Goals \$22K

- Goal 425 Registered
 - 250 Tutorials
 - 50 Workshops
 - 20 Experienced Practitioners

International Goals

- Goal 25 non-USA registered participants

Outreach Goals

- Participation from
 - Other organizations
 - Academic institutions

Exhibitor Goals

- 6 Exhibitors

Sponsorship Goals

- 6 Sponsors



Conference 2007

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Goals

- Dependence on 2006 Success to determine
 - Increased Revenue and Registrations
 - Continuance of Special Programs
 - Experienced Practitioners
 - Spanish Track
 - Client Track
- Increased awareness of Call for Participation
 - Postcard sent to members and friends (integrate with World Usability Day)
 - Advertising in additional Publications
- Outreach with technical organizations

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Conference 2007

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Goals

- More 40 Minute Talks in program if submissions are of good quality
 - Increase diversity of speakers
 - Increase registration/participation
- Addition of Process Improvement Chair on Conference Committee
 - Document and suggest improvements to processes
 - Help new Committee Members feel welcomed and involved

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