Advanced User Research in the Field

Wednesday 4-7pm
Zoom

Instructor: Cliff Lampe
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Twitter: @clifflampe
Office Hours: By appointment

This class will train people how to conduct advanced user research methods, how to know when to apply methods, and how to present findings in a compelling way. Students will conduct user research in the field, reporting on those findings to clients who are facing some type of information problem.

The impetus for this class comes from interviews with UX hiring managers at large companies. They articulated a need for UX education that was more focused on identifying, predicting, and exploring information needs and problems that will arise. This course is to give students the opportunity to conduct user research on problems articulated by clients, collecting data from the field in order to recommend solutions.

Learning objectives

- Mastery of several common UX research methods.
- Competence with a broad range of UX research methods.
- Competence in matching UX methods to research problems.
- Competence in the epistemology behind different methods.
- Mastery in presenting research findings to other stakeholders.
- Competence in UX storytelling techniques

Course Structure

There are a few elements important to understand about this class from the beginning.

This class is client based

We will be working with a variety of clients from the region. These clients will be asked to provide us with an information problem we are facing. The students will work closely with the client in order to understand the nature of that problem, create a user research plan, and to
understand the scope of a solution that best fits the client’s needs. Most clients are local, but some will be distant.

This class focuses on exploring problems

Hiring managers for UX in industry described to me their greatest challenge is finding UX researchers who can take vague problems and turn them into actionable plans. Problems by their nature can be amorphous, dynamic, hard to understand, and laden with hidden values. This class takes a problem-based approach because an advanced skill for user research is turning ambiguity into clarity.

Be open-minded about the problems you are interested in. I’ve seen many times where a team found a problem they didn’t initially think was interesting be the most interesting of all. Keep an eye out for the weird things.

This class follows engaged learning pedagogy

You will be collecting data directly from real humans who are affected by the problem described by your client. This means you will have a chance to practice professional skills, including ethics, in an environment where you may not be familiar with the context. We will support you in thinking about how to enter communities in professional ways, as well as to balance cost and effectiveness in your research.

In practical terms, this means there will be little lecture in this class, and lots of small group work. Additionally, we will be in the field or reporting experiences from the field. Part of engaged learning pedagogy means there will be multiple rounds of feedback at all stages of our process from faculty, peers, and clients. The end goal here is to deliver the very best product we can to the client.

This class is team based

Students will be working in small teams. The instructor will assign the teams after a few weeks of class.

This class focuses on early parts of the “product lifecycle”

User research has a different role to play at different parts of the product lifecycle. Late in the life of a product, the UX researcher might be evaluating the accessibility or effectiveness of a product. This class focuses on the early part of the lifecycle of any potential information product or service. This is where there is a vague sense
of an information need, but that need must be clarified and assessed using the right research methods and analysis techniques.

The combination of problem-focused, client-driven and engaged means that the students will be working in a condition of ambiguity for portions of the class. These are real problems. I won’t know the solutions at the beginning, and neither will you.

Client Process

The goal of this class is to give people a relatively deep dive into user research methods. Working with clients on real problems provides us with a framework with which to choose these methods. The overall process for the course will look like:

1. Instructor and ELO work with clients and develop problem statements.
2. Students are presented with the problem statements in Class 1. They vote on problems they’d most like to work on.
3. Students are assigned problems and teams.
4. Students meet with clients to better understand the nature of the problem they posed.
5. Creation of a research plan. Because we want you to focus on being very good at a few methods, we will be having you pick one main method to pursue.
6. Feedback from instructors, clients and peers on research plans.
7. Conduct of user research following the plan.
8. Analysis of user research.
9. Formulation of proposed solution based on evidence provided by research.
10. Presentation of proposed solution to client.

Every step of this will be an opportunity to practice professional activities and receive iterative feedback from many groups.

Deliverables’

1000 points total.

- Team deliverables - 600
  - Research plan and instruments - 200
  - Final report to client - 250
  - “tarball” - 150
- Individual deliverables - 400
  - Client dossier - 100
  - *Two* of the following
    - Interview script - 100
    - Survey instrument - 100
Participatory design protocol - 100
Storytelling exercise - 100
  ○ Midterm participation - 50
  ○ Final participation - 50

<table>
<thead>
<tr>
<th>Grade</th>
<th>Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>95-100</td>
<td>Consistently distinguished performance in all course aspects, such qualities as analytical ability, creativity, and originality are exhibited at a very high level.</td>
</tr>
<tr>
<td>A-</td>
<td>90-94</td>
<td>Strong, solid achievement in most aspects of the work.</td>
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<tr>
<td>B+</td>
<td>86-89</td>
<td>Good performance. Consistent with performance expected of students in a graduate degree program.</td>
</tr>
<tr>
<td>B</td>
<td>82-85</td>
<td>Acceptable</td>
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<tr>
<td>B-</td>
<td>79-81</td>
<td>Borderline</td>
</tr>
<tr>
<td>C+</td>
<td>76-78</td>
<td>Poor performance. This is a marginal grade which alerts students to their limited performance in a particular course.</td>
</tr>
<tr>
<td>C</td>
<td>73-75</td>
<td>Very poor performance</td>
</tr>
<tr>
<td>C-</td>
<td>70-72</td>
<td>Minimal. Performance not at a graduate student level. Student should review his/her progress in the program with the associate dean for academic affairs.</td>
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Text:
“Ways of Knowing in HCI” - ed. Judith Olson and Wendy Kellogg

Other texts around specific methods will depend on the methods you’ve chosen for your focus.

Class activities
Zoom fatigue is real. It’s hard, if not impossible, to attend to a Zoom call for 3 hours. My goal is to break things up as much as possible. Each week, we’ll have three types of experiences:
   1. Lecture: this is where the instructor shares content. This activity will be broken up by small group exercises.
2. Group discussion: these will be usually practice oriented exercises done in groups, discussions with the faculty and team work time after client projects evolve.
3. UX stories: most weeks we will be listening to someone who works in UX talk about their job and their approach to methods.

How we Zoom

It’s interesting how norms around zoom calls evolve. Literature on best practices is just emerging. Here are the norms for this class on Zoom:

- During group work, discussion and guest speakers, the norm should be for the camera to be ON. Backgrounds are fine to use. This is just a norm. If you really can’t have your camera on, it’s OK.
- It’s OK to have camera off during the lecture.
- Whenever your camera is off, it’s a good idea to have a photo or title slide in as the default image.

An Important Note on Plagiarism

At the University of Michigan and in professional settings generally, plagiarism is an extremely serious matter. All individual written submissions must be your own, original work, written entirely in your own words. You may incorporate excerpts from publications by other authors, but they must be clearly marked as quotations and properly attributed. You may obtain copy editing assistance, and you may discuss your ideas with others, but all substantive writing and ideas must be your own or else be explicitly attributed to another, using a citation sufficiently detailed for someone else to easily locate your source.

All cases of plagiarism will be officially reported and dealt with according to Rackham policies. There will be no warnings, no second chances, no opportunity to rewrite; all plagiarism cases will be immediately reported to SI's Dean of Academic Affairs. Consequences can range from failing the assignment (a grade of zero) or failing the course to expulsion from the University.

For additional information about plagiarism, see the "Academic and Professional Integrity Policy Statement" in the SI Master's Student Handbook, the Rackham pamphlet on Academic Integrity, and the Plagiarism document from the UM Libraries. If you have any doubts about whether you are using the words or ideas of others appropriately, please discuss them with your professor.

Accommodations

If you need an accommodation for a disability, please let us know as soon as possible. Some aspects of this course, the assignments, the in-class activities, and the way we teach may be modified to facilitate your participation and progress. As soon as you make us aware of your needs, we can work with the Office of Services for Students with Disabilities.
(SSD) to help us determine appropriate accommodations. SSD (734-763-3000; http://www.umich.edu/sswd/) typically recommends accommodations through a Verified Individualized Services and Accommodations (VISA) form. We will treat any information you provide as private and confidential.

We are happy to make accommodations for childcare for parents who need it. Please let the instructor know directly what would be helpful. Breastfeeding infants are always welcome in class. Older children are welcome depending on need.

Late Policy

Late work will not be accepted for credit after 48 hours. Before then it will be accepted but there will be a penalty of 20% for each 24-hour period after the time it is due (usually 5pm on the due date specified in the syllabus, unless announced otherwise). In extreme cases (death in the family, severe illness), extensions may be granted. Students must communicate with instructors before the deadline in these cases.

Grade Reconsideration

All requests for grade change must be sent to Dr. Lampe. He will regrade the assignment, and the new grade will stand, whether it’s higher or lower than the original grade.

Student Mental Health and Well-Being

Students may experience stressors that can impact both their academic experience and their personal well-being. These may include academic pressure and challenges associated with relationships, mental health, alcohol or other drugs, identities, finances, etc.

If you are experiencing concerns, seeking help is a courageous thing to do for yourself and those who care about you. If the source of your stressors is academic, please contact me so that we can find solutions together. For personal concerns, U-M offers many resources, some of which are listed at Resources for Student Well-being on the Well-being for U-M Students website. You can also search for additional resources on that website.

For a listing of other mental health resources available on and off campus, visit: http://umich.edu/~mhealth/

Embedded Psychologist, Ashley Evearitt, Psy.D., who you can contact at evaritt@umich.edu.

Classroom Etiquette

Students are encouraged to bring notebook computers to class and to use them actively as learning tools. Students should:
• use laptops for taking notes, conducting research required for activities, and other specific classroom tasks as assigned by the instructor. During class, students should not check e-mail, chat, IM, play games, or perform other off-task activities.
• engage in-class activity as actively as they would in any other class. The computer should not become a barrier to one-on-one interaction, but instead should help facilitate the exchange of ideas and engagement in classroom contact.
• demonstrate sensitivity to others. Students should not display screen images, including wallpapers and screen savers, which might be distracting or offensive to other members of the class.

Specifics on Client Work

Non-Disclosure Agreements and Intellectual Property
Please note that the clients of some projects require all students working on that project to sign an NDA and/or IP agreement. The terms of this agreement can vary from just allowing the client to continue work on the project after the course is over to signing away all rights to royalties and the use of any patent. It is each student’s responsibility to read these agreements and ask questions prior to selecting a project. Non-disclosure agreements may require you to keep the information you obtain about the client’s products and the project confidential for a specified period of time.

UMSI discourages organizations from using NDA and IP agreements; however, some organizations choose to utilize such documents and require students to agree when working on a project associated with their products or data. You have the right to ask to not be assigned a project that has an NDA or IP agreement associated with it.

By selecting one of these projects, you are agreeing to the terms of the IP/NDA contract, even before signing the contract. You are strongly encouraged to read the IP/NDA agreements associated with your project as soon as it is available to you. If you have already signed any sort of agreement with a future employer or a past employer, you may want to consider these agreements and contracts when indicating a preference for your BSI Capstone project.

If you have questions about the agreement, please talk to the project sponsor or Drew Bennett, Associate Director of Licensing, Software, Mobile and Digital Technologies at the U-M Office of Technology Transfer ((734)615.4004, andbenne@umich.edu).

Faculty are not responsible for your NDA/IP agreements. These agreements are signed between student teams the project organization. Faculty are able to be consulted with regarding these documents but are not legal professionals.

Intellectual Property Disclosure: Information exchanged in class is in the context of the course itself. Students who have signed a contract with intellectual property restrictions need to
acknowledge that certain project information is required to be kept confidential amongst the project participants and not discussed in a classroom or public context.

Client Agreement

The University of Michigan School of Information (UMSI) offers advanced research and programs of study from the bachelor’s to the doctoral level to address the social and technical aspects of contemporary information use, creating and sharing knowledge so that people can use information — with technology — to build a better world. We have been teaching the world how to use information and the most advanced technology available since our beginnings in 1926, and we will continue pushing the boundaries for the next 100 years.

Client-based courses (CBCs) are a key component of the curriculum at UMSI. In these courses, selected clients work with student teams on real-world challenges, providing an authentic learning experience for students, while receiving assistance on a relevant and current information-related project.

As a participant in a client-based course, I understand that...

- This is a student project and should not expect professional-level outcomes
- The duration of the commitment is one term unless otherwise indicated
- There is a required proposal revision process to scope the project appropriately
- A designated contact person will be assigned to work on the project who will:
  - Dedicate one to five hours per week towards this project; most likely, the commitment will be less
  - Meet regularly with the student team (ideally once a week or biweekly)
  - Will provide responses to the student team and any necessary project resources in a timely manner
  - Will contact the faculty and Client Engagement Team in the case that there are student issues or project challenges
- A designated secondary contact is required to be aware of the project and be a back-up in the case that primary contact is not available to complete the project or on leave
- Will provide all required agreements (non-disclosure, intellectual property, etc) prior to the start of the class
- All expenses related to the project are borne by the organization unless communicated in advance of the start of the engagement period
- It is encouraged that students are not be paid as part of this program; if payment is an option or required, please contact the Client Engagement Team for more information
- Students are not interns, in that they are not employees of your organization
- A post-experience evaluation is a requirement of participation

If matched to a course, you will be provided with specific details pertaining to the course’s time frame and requirements for clients.
Contact the Engaged Learning Office (ELO) with questions at umsi.client.engagement@umich.edu

Guidelines for Virtual Project-Based Internships
University of Michigan School of Information

Host Organization Agreement:
As a host organization for a project based-learning experience, I understand that...

- This is a student project and professional-level outcomes should not be expected
- This is a learning experience, in which it provides an opportunity to apply knowledge gained in classroom setting
- The student(s) will develop learning objectives related to the project and their professional goals
- The duration of the commitment will be established prior to the start of the internship
- All required agreements (non-disclosure, intellectual property, etc) will be developed and signed prior to the start of the project
- A post-experience evaluation is a requirement of participation

Communications and Contacts:
- A designated contact person at your organization will be assigned to work on the project who will:
  - Provide responses to the student team and any necessary project resources in a timely manner
  - Contact the UMSI program staff in the case that there are student issues or project challenges
- A designated secondary contact is required to be moderately engaged in the project and be a back-up in the case that primary contact is not available to complete the project or on leave
- An in-depth orientation to the organization, project, staff, and associated stakeholders is required. Orientation can and should be on-going throughout the duration of the project to ensure that contextual knowledge is continuously gained.
- Primary staff should allocate up to four hours per week for virtual meetings and to prepare and guide students through the work
- A weekly/regular meeting time will be determined and upheld by all involved project staff
Primary staff should be available during specified business hours for quick questions, check-ins, and feedback as needed to ensure that the project is able to move forward

**Systems, Staff, and Data:**
- A remote/virtual meeting software (i.e. Zoom, GoToMeeting) is in place and accessible by necessary project staff
- Use of a company intranet or virtual workspace on a server, or an online project management or document-sharing tool, such as Office 365, Google Docs, or a similar program is in place and accessible by necessary project staff, allowing all to monitor the work that is being completed and ensuring it's always available to those that need it
- Required access to staff, systems, and data must be in place prior to the start of the project and need to be guaranteed for access throughout the duration of the project
- For a project that requires user engagement, proper access to users through remote systems must be guaranteed; students will explore the modes for engaging with the users, but access to the users through introductions, contact information, etc must be guaranteed
- A home “time zone” will be determined to ensure that all project teams members are provided with established working hours

**Finances and Resources:**
- Students can be paid for their work, if possible. If the host organization can provide funding for students, it should be provided; if this is not possible, this should be communicated with the School of Information Engaged Learning Office staff and alternative funding may be provided
- An appropriate budget should be allocated by the host organization for the project to ensure success; the organization may seek guidance from UMSI staff and students in advance
- All expenses related to the project are borne by the organization unless negotiated in advance of the start of the engagement period
- Understand that the students, as interns, will take on a consulting role for your organization and may actively utilize external resources such as subject matter experts, faculty, library resources, etc in order to enhance the outcomes of the project

**Student Agreement:**
As a student in a project-based internship experience, I understand that...
• I fully commit to participating in this project-based internship and will work on this project until the end of the established project timeframe
• All deliverables will be shared with the client/organization/partner in the timeframe expected
• The resources and time invested by the host organization in the project will be respected
• Standards will be established and I will adhere to best practices for communications with my client/organization/partner; communication involves an open dialogue between all project staff, including an open and honest exchange of ideas, conversations about issues that arise, and the resolution of conflicts through discussion
• There is a need to be flexible and understand that projects and/or work situations will and can evolve from that of the original description
• A weekly/regular meeting time will be determined and upheld by all involved project staff
• I, as an intern, should be available during specified business hours for quick questions, check-ins, and feedback as needed to ensure that the project is able to move forward
• A home “time zone” will be determined to ensure that all project staff are provided with established working hours and off work-hours
• Project budget needs will be communicated in advance and it is understood that such requests may not be able to be funded by the host organization
• Interns should take on a consulting role for the project organization and may actively utilize external resources such as subject matter experts, faculty, library resources, etc. in order to enhance the outcomes of the project
• Provide regular communication and ensure timely response to program managers
• Share with the School of Information in a timely manner any information relating to possible concerns pertaining to your engagement with the organization and/or the ability to fully participate
• Will create a public portfolio that is approved by the host organization as a demonstration of the work done and knowledge gained
• If working in a student team,
  o The team will establish internal working norms and establish a team charter
  o Will seek external guidance through ELO staff if facing team dynamic issues
School of Information Agreement:
UMSI Engaged Learning Office (ELO) Staff will...
- Provide project guidance and/or supervision, specifically in the form of:
  - A qualified project mentor through regular meetings
  - Check-in meetings with ELO staff as needed
- Update organizations on any pertinent information regarding University or UMSI policies and procedures that may affect project work
- Advise on university resources that support student engagement
- Help to mitigate project and organization issues and concerns
- Facilitate the final evaluation and address concerns

UMSI Career Development Office (CDO) Staff will…
- Manage the UMSI Internship Program providing students the opportunity to earn internship credit and/or fulfill a degree requirement
- Provide support for the internship experience by engaging the student in reflective activities related to their internship, as well as through the development of an Internship Learning Portfolio
- Communicate with supervisors/mentors regarding the establishment and outcomes of internship learning objectives
- Advise and consult with students on any internship concerns
- Maintain and update UMSI internship policies, and communicate changes to ELO staff
- Provide an internship evaluation to students and their supervisor/mentor