Chapter 4. A Case for (Re)Envisioning Academic UX Spaces: Lessons Learned at a Polytechnic University

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Abstract: This chapter charts the rise and fall of a university UX lab. Though the lab started with great enthusiasm, it proved difficult to find paying clients outside of the university and to serve internal university clients who needed but could not pay for UX services. This chapter provides takeaways and reflections about why the lab failed and how it might have succeeded.

In another life, prior to my current position as a Senior UX Researcher at Edward Jones, I tried and ultimately failed to create and participate in a complex UX collaboration. This manuscript tells the story of that failure, not as a tale of woe, but as one from which others considering such an endeavor might learn. In the fall of 2014–2015, as a newly hired assistant professor at a comprehensive, regional polytechnic university in the Upper Midwest, I embarked upon a multifaceted collaboration to envision, establish, grow, and sustain an interdisciplinary and extra-institutional hub of UX activity—a university UX research center. Despite a concerted, five-year effort, this endeavor ultimately resulted in the center's decommissioning in the summer of 2019.

Given the center's eventual demise, perhaps it would have been wise to learn from Jakob Nielsen, who offers that he is "not sure that the answer [to a desire to improve product usability] is to build a usability lab right away" because "even though usability laboratories are great resources for usability engineering groups, it is possible to get started with simpler usability methods that can be used immediately" (Nielsen, 1994). Nonetheless, developing a lab remains as a topic of interest, and Jeff Sauro (2018) details the requirements of a successful UX lab, evaluating existing labs and considering the perspectives of both employees and clients of a potential, functioning lab. Still, creating a physical hub of UX and usability activity is complicated by the logistics of doing so and the development of methods and technologies to delimit its need. Jennifer Ismirle (2018), in her comprehensive literature review of mobile UX research (i.e., going into "the wild" and leaving the laboratory), concludes that doing UX and usability work in field settings, complemented by less restrictive mobile methods, allows for greater understanding of the UX and usability of an interface. Further, as noted, again by Nielsen, "the staffing, management, and organizational placement of usability groups are important issues that must unfortunately be left unresolved . . . since

virtually no research is available to resolve them" (1994). This remains true in large part today, with the exception of a few works in the field of technical communication. These scholars help put into perspective the struggles I faced with my venture.

Thus, aligned with reflections on the history of usability and UX in technical communication (Redish & Barnum, 2011), this case study provides stakeholders with further perspective on a host of questions for commencing and sustaining a collaboration of this ilk: What types of collaborations does an academic UX space require and support? How can a space complement academic curricula and the institutional mission? Who does the space serve? Who oversees the space and this work? How is it funded? What sustains those efforts? Further, by reflecting on the trials and tribulations of this long-term collaboration, this narrative details both the academic and industry consequences of my failures and the lessons learned from those failures.

■ The Vision of a UX Research Center

From its inception, the center was designed as a site where faculty and students would engage in research to apply disciplinary principles to real-world usability and UX problems, to contribute to the scholarship and practice of user-centered research, and to promote the application of user-centered principles by:

- Connecting curriculum and real-world client projects,
- Developing applied research opportunities,
- Responding to community and business needs, and
- Leveraging the center as a recruiting and retention tool.

Accordingly, the moment I stepped on campus, I began work with a newly formed faculty steering committee to author a proposal for a system-approved UX research center, which included my appointment as the center's director.[1] As director, I was solely responsible for cultivating and sustaining external client relationships while positioning the center as both a campus and regionally recognized resource, a UX research and teaching-and-learning space. I was also charged with the following responsibilities:

- Oversee the day-to-day operations of the center.
- Manage and coordinate usability projects in consultation with program faculty.
- Work with university program directors to infuse center programming into the curricula.

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1.   Based on the less-than-successful history of related efforts at our institution with no dedicated paid time, the center director received .25 reassigned time (the equivalent of one course per semester) for the work associated with developing, sustaining, and growing the center.

- Meet with the center's steering committee to help guide the center's short- and long-term goals.
- Ensure proper institutional procedures for engaging clients, including those related to contracts, budgets, and deliverables.
- Hire, train, and manage graduate assistants and undergraduate practicum students.
- Recruit external clients to generate revenue to support the center and director position.
- Assess the center based on its goals and provide yearly assessment reports to the dean, program faculty, and our professional advisory board members.
- Manage the center budget, maintaining budget authority jointly with the college budget manager.

■ Setting the Collaboration Stage

In order to do this type of UX work—that which straddles the lines of not only academy-industry partnerships, but also the push-and-pull between the inherent academic and administrative constraints and a free-market approach to building what is ostensibly a small business—I engaged myriad collaborators from three categories: UX clients, interdisciplinary colleagues, and administrators.

Granted a funded probationary status to move toward fiscal sustainability (to fund the director position and any associated center costs), the center was built on a revenue-generation model. As such, I was charged with determining services offered by the center, developing rates the center would charge for those services, and gaining institutional approval for those rates. The collaborative effort required to put the pieces in place to lead a revenue-generating center cannot be understated. I leaned on the expertise and experience of former professors, disciplinary colleagues, and my graduate school network to determine services and pricing in a higher-education setting. I connected with regional UX practitioners to inform the center's scope. I met with administrators and financial experts across my institution to develop systems and protocols. I consulted with various administrative units to navigate bureaucratic policies for contracts, payments, and vendor statuses with clients. I coordinated with facilities and IT authorities to plan and institute a physical center space for doing usability and UX research. I conferred with deans, department heads, and the center steering committee to determine short- and long-term goals for the center. I worked with a graduate student and graphic designer to develop a center identity—supported by a web and mobile presence, marketing collateral, signage, advertising, and documentation templates. These collaborative efforts culminated in an official three-day center grand opening event that aligned with World Usability Day, a hosted UX-themed Great Plains Alliance for Computers and Writing Conference in the fall of 2016, and the grand opening of the renovated building in which the center was housed. This was a monumental initiative, to be sure.

■ Revenue-Generating Collaboration Effort

Thus, after a year or more of planning, I began in earnest efforts to engage clients and generate income for the center. One of the major components of this UX collaboration, especially in a revenue-dependent model, was lead generation. Obviously, tapping an assortment of networks is essential for finding, contacting, and creating business relationships. Because my institution was a dedicated polytechnic that required practicum and/or internship experiences for all students—coupled with requisite professional advisory boards for all programs—I had a built-in set of industry connections on which to draw. Thus, I was able to immediately begin the process of reaching out to, setting up meetings with, and "selling" the services of the center to potential clients in our region. Contacts included an international communication company dedicated to online legal material, an industry-leading maintenance equipment company, a prominent plumbing-manufacturing corporation, and an American multinational conglomerate corporation operating in the fields of industry, worker safety, U.S. health care, and consumer goods.

One example of the collaborative effort required to generate revenue can be best understood through my relationship with the communication company. Over the course of three years, eight times I traveled the 140-mile roundtrip to the company headquarters on my own dime. I met with varied units, developed and pitched five proposals, and worked with administrative bodies from my university and the company for contracted and paid services. These efforts yielded a contract for a two-phased UX research study, generating nearly $16,000. Of the contracted payment, roughly 50 percent landed in the center's coffers (after university and unit overhead, administrative costs, user payments, study costs, etc.) to help support the center and director position. None of my other, similarly thorough efforts lead to any revenue. Sustaining a UX center solely from this inefficient and labor-intensive client revenue model proved to be more difficult than anticipated.

In order to complement my institutional networking efforts and optimize lead-generation time, I simultaneously began to tap my personal network of people working in industries that might need and benefit from the type of UX services offered by the center. In connecting with, for example, a SaaS company and a national outpatient diagnostic imaging company, I was able to produce two contracts totaling approximately $5,000. I also facilitated the landing of a supported summer internship by one of my excellent undergraduate students, for which I served as director and project consultant. While I was certainly able to be more efficient in these networking efforts, limiting the number of preliminary and fact-finding meetings, false starts, and negotiated proposals for scope of services, the effort did not equal the output; the amount of revenue did not support the time invested as the center director.

■ Pedagogical Collaboration Consequences

While the work-to-revenue balance from my lead generation was suboptimal, there was a silver lining: This networking provided my students with a host of opportunities to work with real-world clients in a UX context. Some of these opportunities came in the form of directed, paid internships for graduate and undergraduate students. For example, while my center's proposal to the university web development team to do iterative UX research on the design of our new university website was turned down—because, based on our university-approved center rate sheet, the desired services would comprise over a quarter of the project budget—I was able to negotiate, advise, and direct a single graduate student in doing over $15,000 (used for wages, overhead, and benefits) in UX work on the project that helped support their graduate education. This experience proved fundamental in their education and resulting post-graduation employment as a UX researcher.

Further, each semester I taught my undergraduate usability course during the center's operation, I was able to develop high stakes, authentic opportunities for students to engage, communicate with, conduct research for, and present findings to stakeholders in our region. While some of these collaborations were with industry and small business clients external to the institution, many were born from internal, interdisciplinary UX and usability needs. We developed assorted relationships and conducted projects with programs and units across campus. For example, we worked with the game design and development, interactive design, packaging, industrial design, and MFA in design programs. We took on as clients the university library, career services, learning information technologies, and enterprise information systems.

■ The Center's Demise

Throughout my tenure as the center's director, I had to turn down countless university units and UX needs due to budgetary constraints: Because of our approved rates and the revenue-generation imperative, unless units were able to pay the center for services or they were willing to have undergraduate students take the lead on the needed UX work, the center was forced to deny services to these campus entities. Consequently, I worked for over a year to pivot the center to a new model that exclusively served the UX needs of campus units, one where the center and its director would complete a specified number of projects per semester based on established selection criteria (e.g., priority, interface type, users served by the interface, alignment with institutional mission, etc.). Despite various attempted collaborations, which included a host of meetings with offices across campus, interviews with stakeholders, formal proposals to administration, and much interdisciplinary collaboration across academic units, the center was

decommissioned and forced to shut its doors. I returned to teaching a full complement of courses in the fall of the 2019–2020 academic year.

Lessons Learned from Failure

While I learned much about UX collaboration throughout my time as director—with industry partners, institutional stakeholders, students, faculty, and colleagues across the country—for the purposes of this volume, several salient takeaways exist. I experienced first-hand how time-intensive and cost-prohibitive lead generation can be in an academy-industry collaboration that relies on revenue. This was not only problematic for the center's model, but also for involved faculty navigating tenure and/or promotion. Simply put, industry doesn't move at the same pace as academia. Industry partners' cadences, needs, urgency, projects, administrative processes, and budget-cycles don't necessarily align with semester calendars, tenure and promotion clocks, and center or university budgets. Illustrated through the communication company collaboration detailed above, this misalignment can be an impediment to producing enough income to support a center space and its staff. Accordingly, identifying institutional allies and an administrative collaborator for the work the UX space and its team engages is paramount. Creating partners who will express the importance of UX (to faculty, administration, industry contacts, and students) and collaborate on cross-disciplinary projects is invaluable in helping enhance campus understanding of UX and the role that a UX center might play.

Additionally (and unsurprisingly), a fundamental component of a successful UX space is an established, consistent institutional funding source that not only supports a dedicated position, but also funds research technologies, equipment, supplies, and various study needs as they arise. The potential for securing that source is directly related to collaborating with an individual or institutional unit that understands and values UX from an intellectual, academic, and industry perspective—someone who recognizes how collaborating on UX projects is beneficial for a variety of stakeholders across and beyond the university, including the students the institution serves.

Lessons Learned from Collaboration

Although the bulk of what I came to understand throughout my five-year venture smacks of "should have" and "could have" type lessons, there were some positive outcomes that made the center and related struggles worthwhile. This UX collaboration, even if it didn't lead to much contracted revenue, provided me, my academic program, and the university valuable connections not otherwise possible. One of the most satisfying professional consequences of my UX center involvement was the depth of relationships I developed across campus. Being a truly interdisciplinary field, UX provided me opportunities to get out of my academic

"silo," and collaborate with faculty, staff, and administrators across campus. Not only did this provide me with a better personal and professional experience, but it also contributed to my expanding conception of UX as a field. Further, the networking born from industry lead-generation efforts produced numerous student internships with industry partners, several of which led to subsequent employment opportunities for our graduates. Relatedly, the established UX center connections produced several advisory board members who provided valuable industry insights, dialog, and direction to help guide our academic programming and kept us on the leading edge of professional and technical communication education. These two related groups—interdisciplinary colleagues and industry professionals—also contributed to my UX-related research efforts, many serving as interview participants, points of contact, or informal sounding boards on research projects. Thus, my time as center director, while ultimately suboptimal from a revenue perspective, contributed to my professional objective in earning tenure and promotion to associate professor and, I would argue, my current position in industry; without the opportunities I had during and after my time as center director, I wouldn't have had the requisite skills, qualities, and experiences to land a job as a UX researcher. The variety of projects, interfaces, stakeholders, and methods I engaged during my time as an academic proved paramount to my future success.

▌ Takeaways and Conclusion

So, was attempting to build and sustain a dedicated UX space worth it? Yes. Could the effort have been more efficient, effective, and successful. Absolutely. Did I learn anything I might pass along to others considering such an endeavor? Unequivocally. While the existential lessons learned are certainly worth consideration, more pragmatically, those in a position to begin planning an institutional UX research center might attend to the following:

- Avoid the allure of a revenue-creation model when pitching to administration. While it will more likely yield support, the constraints to success far outweigh the financial proceeds.
- Highlight the professional, disciplinary, institutional, and student benefits that a supported UX research center affords.
- Align the center, its objectives, and its outputs with cross-institutional curricula by making connections with the varied (and there are many) departments, programs, and majors with UX interests—direct or peripheral.
- Seek to identify UX research needs and opportunities across campus to support the immediate value of the proposed center's creation.
- Develop a clear, measurable, and marketable model for supporting UX research needs within (primary) and without (secondary) the university, one including intake criteria, a typical schedule, and the scope of services that includes an associated fee schedule for different client types.

For those in industry hoping to learn more about UX research and what might be in your communities, consider the following next steps:

- Inquire about academic research at your local universities, as it is relatively less expensive than for-contract work provided by industry UX practitioners.
- Think about an academic research center as a personnel pipeline in industry environments without in-house UX—for internships and UX-minded technical communicators.
- Engage with academic UX researchers to help clarify how UX can provide value that impacts a company's financial bottom line.
- Solicit consultation to help those in industry (e.g., digital marketing or communication departments) who engage with third-party vendors to better understand the differences among UX, UXD, UCD, UI, ID, LxD, IxD, CX, usability, and various other initialisms surrounding our field.

According to our editors' CFP, "user experience work demands better collaboration." I would argue that *better* collaboration is *strategic* collaboration. Because of the complex nature of UX partnerships, they command acute rhetorical acumen. This case represents an evolution of that acumen, and were I less self-assured and more diligent in my formative, pre-launch research, I might have made some different choices. When I first conceived of and designed the center, I did so with an assumption akin to "if you build it, they will come." I naïvely anticipated that, during the prevailing industry UX culture at the time, developing a center to serve the varied UX needs of disparate stakeholders at bargain-basement rates (and superior quality) would obviously find success; surely, everyone needs UX, and the center would be a cost-effective solution for those in the region. The money would rain from the UX heavens, and the center would be able to find sustainability and even contribute to programmatic, departmental, and college budgets. Alas, the situation was far more complex in contemporary higher education culture, something I learned first-hand over my time as director. There were countless components that made the center fiscally untenable, and those factors align with this volume's emphasis. Collaboration—before and throughout the endeavor—is the key to success, and that success is more than likely not tied to revenue. It can be something so much more profound for academics wanting to do, teach, and grow UX, providing opportunities and experiences for myriad stakeholders within and without the academy. While I came to understand much about collaborating in UX contexts, one of the most striking lessons was that while people—both in academia and industry—think they value UX, most don't completely know what it is, where it lives, and what it can or should mean. Since the uninitiated don't fully understand it, it takes much to get would-be collaborators to support UX or purchase UX services from those who do. Working with stakeholders in a variety of environments requires time, dedication, and forethought. These collaborations are challenging and minimally lucrative when

academically constrained, even if they are valuable for many across the university. While I still wear the center's failure as an academic "black eye," what it afforded so many (including me) who rubbed up against our hub of UX activity made it fruitful and fulfilling—a story worth telling.

■ References

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