Sakai Sakai Board: Communications
UX Lead Initiative

Added by Clay Fenlason, last edited by Chris Coppola on Mar 13, 2007

The UX Lead Initiative

The Sakai software is evolving as a leading platform for scholarly collaboration in teaching, learning and research, using the emerging community source model for directed open source software development. Over the past two years Sakai has pioneered models for community organization and coordination that helped us adapt success in open source infrastructure software to the community source model. Our next frontier is to incorporate successful models in the development of *user-centered* applications.

We have an opportunity to tap the talent in our community and harness it to achieve unprecedented results in the Sakai software. The design talent in our community is exceptional, and there is a strong collective will to make Sakai exceptionally usable and accessible. Adding a key leadership position will help us harness the talent and collective will and utilize them effectively to achieve a dramatically improved user experience. Although no one person is going to single-handedly handle all of Sakai's usability issues, there is a strong need for this leadership and coordination to help the community take on these challenges. A lack of this leadership to date has stood as a barrier to settling on clear and coherent design goals and strategies, while a lack of this coordination has stood as a significant barrier to designer engagement, since designers cannot themselves simply dive in and start reworking or producing tools the way a developer might.

During the recent 6th Sakai conference in Atlanta the Sakai board heard a clear call from the community for the Foundation to increase leadership and accountability for Sakai's user experience. An exceptional user experience in Sakai will be the result of a coherent vision and coordination of the user experience designers, user interface developers, and architects among us. The amount of effort required of this leadership, coordination, design, and development merits a full-time foundation staff position.

Foundation staff position

The Sakai Foundation intends to recruit a user experience design lead as a full-time staff position. This UX lead will:

- Develop and execute a plan for Sakai's user experience that balances a coherent long-term strategy and alignment with projects like FLUID and

FLUX with near-term progress that enhances the user experience with each release
- Define a sustainable UI strategy that leverages existing and expands the talent in the community
- Be accountable for the Sakai user experience ¿ coordinating input, user research, designs, bringing UI decisions to closure, and communicating and documenting those decisions
- A full job description is attached.

Contributions

The Foundation needs support from your institution to implement this strategy. The most straightforward way to show your institution's support is to pledge some funding for the position. Many of you have asked the Foundation to provide a way for members to show support for a particular initiative or aspect of the Foundation. The Sakai board is responding to this need with a program that allows members to "pledge" funds to support projects, staff positions, or other initiatives that are important to your institution.

One of the great strengths of our community is our ability to bring our collective energy and resources to bear on a common objective. We know that the improving the user experience is an objective worthy of our collective attention. Please show your support today. Contact chris.coppola@rsmart.com to discuss this further or to pledge a donation. If you have current UI design or usability capacity in your organization that you can contribute to the project, contact Mara Hancock: mara@media.berkeley.edu .

Initiative "roadmap"

1. Develop shared understanding of UX lead position with prominent members of Sakai's design community (completed in Jan., 2007)
    o see job description attached
2. Announce initiative and Board members will proactively begin seeking targeted community contributions (announced the week of Feb. 11, 2007)
3. Form a hiring committee and begin recruitment efforts (coming soon)

Initiative FAQ

How much will this cost?

Including benefits, we estimate roughly $110K per year.

Can this really not be funded from the current foundation budget?

The short answer is "no." See the closing section of Chuck Severance's Foundation Overview■ presentation from the Atlanta conference in December. We are stretched pretty tight as it is.

What if community contributions don't cover the cost?

We're going to begin by encouraging community pledges, and we feel that's the best solution - where the community extends its resources to meet an expressed, compelling and shared need. We heard very clearly from community members in Atlanta that usability is among the most prominent concerns, and so we think there is enough support out there in the community to approach the funding goal. In the event of a shortfall, however, the Board is prepared to consider other sources of funding in order to make up the gap, perhaps as a last resort even a budgetary tradeoff, but we haven't yet approached the point of being ready to think about what it might mean to exact that pound of flesh.

How much has been collected already?

See the chart

Fund Progress

Target: [US]$110,000

Contributing Organizations	
The rSmart Group■	
University of Cambridge■	
Yale University■	
Johns Hopkins University■	
Indiana University■	
Charles Sturt University■	
Total	**$30,000**
Remaining Gap	($80,000)

When will the hiring process begin?

We're currently planning this. The first step will be to establish a hiring committee. Once we have the committee established, that group will set a timeline.

How do I apply for this job?

If you're interested in applying for the job, contact Chris Coppola for now. Once a hiring committee has been established this answer will be updated.

Position Description: User Experience Design Lead

Status: Full time

Salary range: 75-90 DOE/DOL

Opportunity:

Unique opportunity to play a key leadership role in a global open source project developing a scholarly collaboration system for teaching, learning, and research. The Sakai Collaboration and Learning Environment is being adopted by hundreds of colleges and universities around the world. The successful candidate will have the chance to pioneer methods for community collaboration on user experience design and development among an international pool of talented contributors.

The Sakai User Experience Design Lead is accountable for the user experience and for implementing a sustainable user-centered design and development practice that leverages the available community talent.
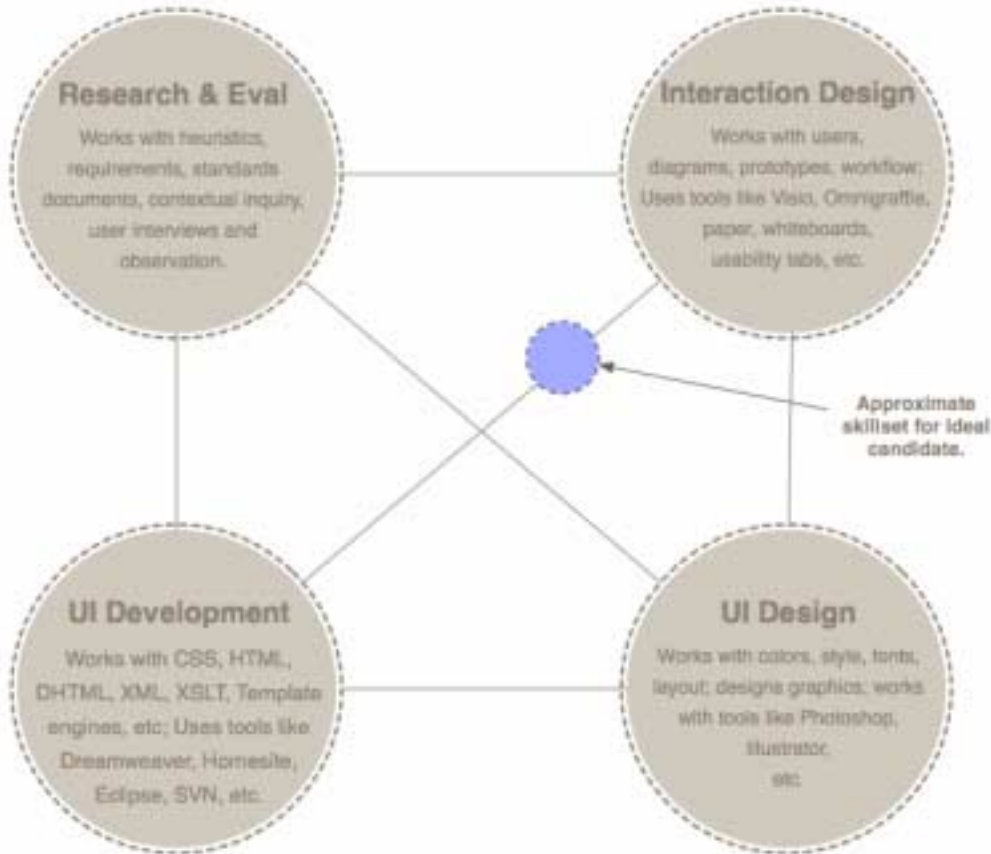
Primary duties will include:

- Lead user experience design (interaction design, interface design, interface development) talent in the community
- Develop and implement a plan for consistent improvement of the Sakai user experience
- Lead user research and create community research practices (e.g. contextual inquiry, observation, task analysis); create ways to collaborate, share and synthesize findings across the community.
- User interaction and interface design on specific projects as necessary
- Develop and define viable software development practices to leverage the deployment of the range of UI skill sets across the community from user research to prototype development.
- Usability studies (heuristic Evaluation, cognitive walkthroughs, user testing)
- Advocate and create implementable strategies for user-centric methodologies in the community development processes (including requirements)
- Advocate for user-centered design as a driver in the Sakai requirements process
- Act as liaison and translator between UX contributors and developers to work out issues implementing designs/design standards, help build bridges between the two communities.
- Participate in technical discussions/decisions affecting design implementation (e.g. choosing presentation layer technologies, adhering to accessibility standards, etc.)
- Champion "standards" documentation for naming, positioning, etc. conventions
- Build sustainable community practices for UX/UI development
- Recruit UI talent for Sakai projects in need of work

Skills

- Understanding of and enthusiasm for open source and community source communities and practices
- Ability to see the "big picture" while focusing the details
- Experience working with complex enterprise systems in a distributed environment
- Usability engineering
- Visual interface and interaction design
- Demonstrated ability in contextual inquiry, user interviews and observation

- Diplomacy, leadership, written/electronic/oral communication and presentation skills
- Strong decision maker, assertive, works well with light direction
- Significant experience with HTML, XSLT, XML, CSS, JavaScript, DHTML

The ideal candidate for the Sakai UX Design Lead will have a broad range of UX skills that span Interaction Design, UI Design, UI Development, Research, and Evaluation. The diagram below attempts to show the various UX-related skills and the emphasis for those skills needed for this position. An expectation for this position will be an ability to play a leadership role and to actively recruit and coordinate the efforts of other individuals in the community who's skill sets are honed in Interaction Design, Visual Design, UI Development, and User Research. Demonstrated work experience in all these area and playing a leadership role is desirable.

Research & Eval

Works with heuristics, requirements, standards documents, contextual inquiry, user interviews and observation.

Interaction Design

Works with users, diagrams, prototypes, workflow; Uses tools like Visio, Omnigraffle, paper, whiteboards, usability labs, etc.

Approximate skillset for ideal candidate.

UI Development

Works with CSS, HTML, DHTML, XML, XSLT, Template engines, etc; Uses tools like Dreamweaver, Homesite, Eclipse, SVN, etc.

UI Design

Works with colors, style, fonts, layout; designs graphics; works with tools like Photoshop, Illustrator, etc.

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Our ongoing challenge is to tap the talent in our community and harness it to achieve unprecedented results in the Sakai software. At present, while there is design talent in our community and an even stronger desire to make Sakai exceptionally usable and accessible, the foundation lacks a key leadership and coordination role accountable for the user experience. Although no one person is going to single-handedly handle all of Sakai's usability issues, there is a strong need for this leadership and coordination to help the community take on these challenges. A lack of this leadership to date has stood as a barrier to settling on clear and coherent design goals and strategies, while a lack of this coordination has stood as a significant barrier to designer engagement, since designers cannot themselves simply dive in and start reworking or producing tools the way a developer might.

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- Be accountable for the Sakai user experience—coordinating input, user research, designs, bringing UI decisions to closure, and communicating and documenting those decisions
- A full job description is attached to this proposal.

Show your support

The Sakai Foundation board of directors and executive director are looking for strong community support of this new staff position. The most straightforward way to show your institution's support is to pledge some funding for the position. Many of our members have asked the Foundation to provide a way for members to show support for a particular initiative or aspect of the Foundation. The Sakai board is responding to this need with a program that allows members to "pledge" funds to support projects, staff positions, or other initiatives that are important to your institution. We have heard clearly that the Sakai user experience should be a key area of focus and believe this position is a first step toward clear and measurable progress. This position will cost the Foundation roughly $110K/year including benefits.

Show your support for this position by pledging to fund a portion of the position. The Foundation is prepared to manage the pooling of member funding. Even the smallest contribution is greatly appreciated. If the Sakai user experience is important to your institution, please show your support with a pledge today. Contact: chris.coppola@rsmart.com to discuss this further or to pledge a donation. In addition, if you have current UI

design or usability capacity in your organization that you can contribute to the project, contact Mara Hancock: mara@media.berkeley.edu.

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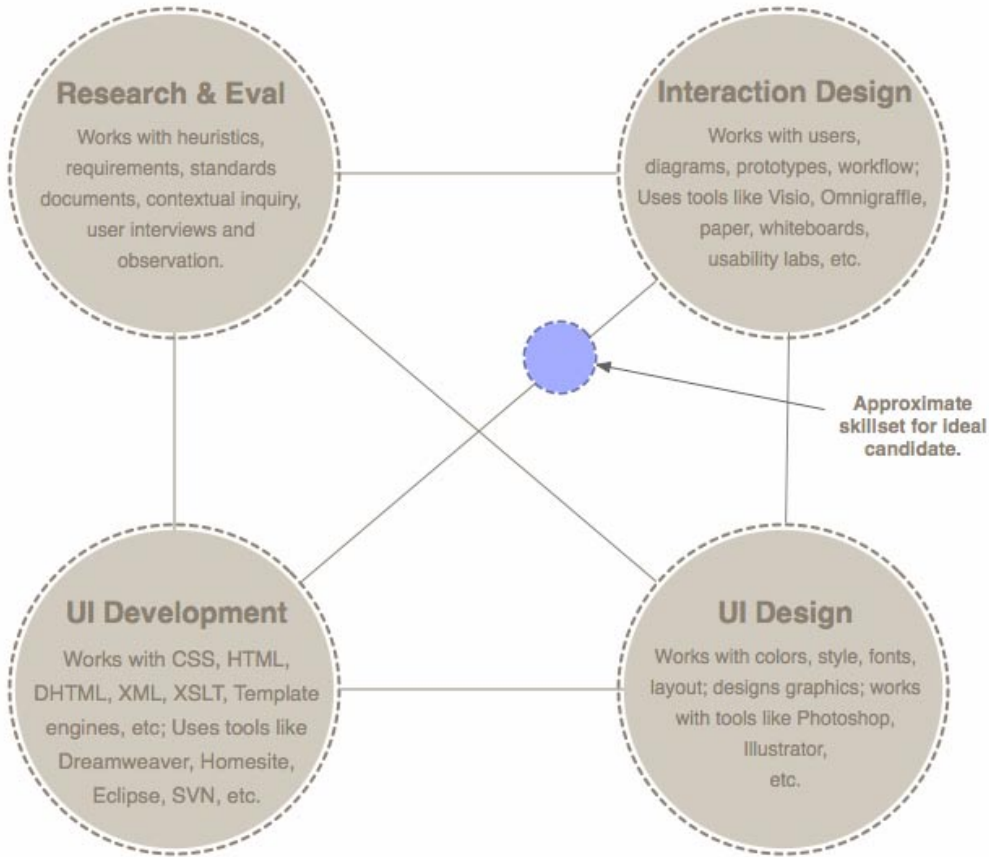
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Acknowledgement of Contribution to
The Sakai Foundation Fund to Support
The Sakai User Experience (UX) Lead Position

1. **Establishment and Purpose of the Fund.** A fund has been established on the books of the Foundation that is known as the **Sakai UX Lead Initiative** (the "Fund").
The Sakai Foundation (The Foundation) has established a fund within the Foundation to be used for the following specified purpose(s):
<u>The Fund will be used to accelerate the hire of a full time Foundation staff position who's role will be User Experience (UX) Lead. The fund is intended to cover a budget gap in 2007 with the expectation that the Foundation will budget for the position going forward.</u>

2. **Contributions to the Fund**.
The Fund will include the funds and/or property this day received from the Sponsor, to be added and combined with any other funds and/or property as may have been received and included in the Fund to date, and any funds and/or property that from time to time may be transferred to the Foundation from any source, accepted by the Foundation for inclusion in the Fund, plus any and all income from the foregoing funds and/or property. Delivery of said funds and/or property constitutes an irrevocable gift of same to the Foundation upon acceptance of its transfer and with the terms and conditions specified in this document

3. **Ownership and Control.** The Fund will be the property of the Foundation, and will be held by it in its normal corporate capacity; it shall not be deemed a trust fund held by it in a trustee capacity. The Foundation will have the ultimate authority and control over all property in the Fund, and the income derived therefrom, for the tax-exempt purposes of the Foundation.

4. **Distributions.** Foundation shall have sole discretion to make decisions regarding expenditures, distributions, or grants from the Fund in furtherance of the stated fund purposes. Distributions from the Fund of the income or principal or both of the Fund, within the limitations provided for in paragraph 1 above, will be made at such times, in such amounts, in such ways and for such exempt purposes (or any combination of such purposes) as the Foundation approves.

5. **Investments.** The Foundation shall at all times retain the full authority and control over the investment of the assets contributed to the Fund pending their expenditure for the purposes of the fund.

6. **Termination of Fund.**   Upon completion of the project which the Fund was established to support, Foundation shall have the right to transfer any remaining balance in the Fund into its general account, and to use said balance for Foundation's exempt purposes, including its general operating expenses. The Foundation reserves the right to determine, in its sole discretion, when the project has been completed, and whether by accomplishing the goals of the project, or otherwise terminating the project.

7. **Fees.** The Foundation reserves the right to charge the Fund reasonable fees incurred in administering the Fund.

8. **Tax Exempt Status.** The Fund will be used only for tax exempt IRC 501(c)(3) purposes within the purposes of the Foundation, either directly by the Foundation, and/or by payments of contributions to other organizations for such purpose or purposes. It is intended that nothing in the Agreement will affect the status of the Foundation as an organization described in Section 501 (c)(3) of the Internal Revenue Code of 1986 and as an organization which is not a private foundation within the meaning of Section 509(a). This Agreement will be interpreted in a manner consistent with the foregoing intention and so as to conform to the requirements of the foregoing provisions of the Code and any regulations issued pursuant thereto. The Foundation is authorized to amend this Agreement to conform to the provisions of any applicable law or government regulation in order to carry out the foregoing intention. Reference herein to provisions of the Internal Revenue Code of 1986 shall be deemed references to the corresponding provisions of any future Internal Revenue law.

Sponsor and description of donation:
(_____
_____)

Receipt of the above-described property on this date is hereby acknowledged.

For the Sakai Foundation:
Date accepted: _____.

Signed: _____
Name: _____
Title: _____