

Syllabus

Usability Testing for Survey Research

Emily Geisen

Dr. Jennifer Romano

6 March 2024 - 27 March 2024

Course Abstract

This course introduces the concepts of usability and usability testing and why they are needed for survey research. The course provides a theoretical model for understanding the respondent-survey interaction and then provides practical methods for incorporating iterative user-centered design and testing into the survey development process. The course provides techniques and examples for designing, planning, conducting and analyzing usability studies on web or mobile surveys.

Course Objectives

By the end of the course, students will...

- understand what usability and usability testing are and how to apply usability testing to survey research
- learn about moderating techniques, such as the think-aloud protocol and verbal probing
- learn when to test, where to test (lab vs. field vs. remote) and who to test with (type and number of participants)
- be able to plan for usability testing (develop protocol guide, determine test metrics, consider hardware/software)
- learn what to test: conceptual testing, paper prototypes, wireframes
- understand how to collect, record, and analyze usability data

Course Composition and Teaching Methods

This is an online course, using a flipped classroom design. It covers the same material and content as an on-site course but runs differently. In this course, you are responsible for watching video-recorded lectures and reading the required literature for each unit prior to participating in mandatory weekly one-hour online meetings where students have the chance to discuss the materials from a unit with the instructor.

Although this is an online course where students have more freedom in when they engage with the course materials, students are expected to spend the same amount of time overall on all activities in the course – including preparatory activities (readings, studying), in-class-activities (watching videos, participating in online meetings), and follow-up activities (working on assignments and exams) – as in an on-site course. As a rule of thumb, you can expect to spend approximately 3h/week on in-class-activities and 9 hours per week on out-of-class activities (preparing for class, readings, assignments, projects, studying for quizzes and exams). Therefore, the workload in all courses will be approximately 12h/week. This is a 1-credit/2-ECTS course that runs for 4 weeks. Please note that the actual workload will depend on your personal knowledge.

Wednesdays, 11:00 AM EDT/5:00 PM CEST, starting March 6, 2024

The 1 hour meetings will be held online through Zoom. Follow the link to the meeting sessions on the course website on <https://elms.umd.edu/>.

In preparation for the weekly online meetings, students are expected to watch the lecture videos and read the assigned literature before the start of the meeting. In addition, students are encouraged to post questions about the materials covered in the videos and readings of the week in the forum before the meetings (deadline for posting questions is Tuesday, 11:00 PM EDT/5:00 PM CEST).

Students have the opportunity to use the BigBlueButton feature in Canvas to connect with peers outside the scheduled weekly online meetings (e.g., for study groups). Students are not required to use BigBlueButton and can of course use other online meeting platforms such as Google Hangouts, Skype or Microsoft Teams.

Evaluation and Grading

Grading will be based on:

- Participation in discussion during the weekly online meetings (10% of grade)
- Weekly online exercises reviewing specific aspects of the material covered (60% of grade)
- A final open-book online exam (30% of grade)

A+ 100 - 97

A 96 - 93

A- 92 - 90

B+ 89 - 87

B 86 - 83

B- 82 - 80

Etc.

Variations for grading on a scale are at the discretion of the instructor.

The final grade will be communicated under the assignment "Final Grade" in the Canvas course. Please note that the letter grade written in parentheses in Canvas is the correct final grade. The point-grade displayed alongside the letter grade is irrelevant and can be ignored.

Dates of when assignments will be due are indicated in the syllabus. Extensions will be granted sparingly and are at the instructors' discretion.

Readings

Primary Readings

Geisen, E., & Romano Bergstrom, J. (2017). *Usability Testing for Survey Research*. Waltham: Morgan Kaufmann. (available at <https://www.amazon.com/Usability-Testing-Survey-Research-Geisen/dp/0128036567>)

Required and Recommended Readings

List of required and recommended readings for each class are provided below for each specific unit.

Sessions

Week 1: Introduction

Video lecture: available Wednesday, February 28, 2024

Online meeting: Wednesday, March 6, 2024, 11:00 AM EDT/5:00 PM CEST

Assignment 1 due Wednesday, March 13, 2024, 11:00 AM EDT/5:00 PM CEST

Required Readings:

Textbook: Chapters 1 & 2

Recommended Readings:

Couper (2000). Usability evaluation of computer-assisted survey instruments. *Social Science Computer Review*, 18(4), 384-396.

Week 2: **SPRING BREAK**NO CLASS MARCH 22**

Week 3: Moderating Techniques

Video lecture: available Wednesday, March 6, 2024

Online meeting: Wednesday, March 13, 2024, 11:00 AM EDT / 5:00 PM CEST

Assignment 2 due Wednesday, March 27, 2024, 11:00 AM EDT / 5:00 PM CEST

Required Readings:

Textbook: Chapters 6 & 7

Week 3: Test Materials, Metrics, Equipment, Location

Video lecture: available Wednesday, March 13, 2023

Online Meeting: Wednesday, March 27, 2024, 11:00 AM EDT/5:00 PM CEST

Assignment 3 due Wednesday, April 3, 2024, 11:00 AM EDT / 5:00 PM CEST

Required Readings:

Textbook: Chapters 4 & 5

Week 4: What to test / Analyzing Results

Video lecture: available Wednesday, March 27, 2024

Online meeting: Wednesday, April 3, 2024, 11:00 AM EDT/5:00 PM CEST

Required Readings:

Textbook: Chapters 3 & 8

Project/Homework/Final exam

A final open-book online exam

Due: Wednesday, April 10, 2024 11:00 AM EDT/5:00 PM CEST

About the Lecturers

Emily Geisen **Senior XM Scientist at Qualtrics**

Emily Geisen is a Senior Experience Management Scientist at Qualtrics. She manages a team of 10 Project Managers in Qualtrics' Sample Science and Delivery unit. Her responsibilities also include improving data quality (identifying and preventing fraudulent response) and consulting with clients and internal product teams on questionnaire design, visual design, and usability best practices. Prior to Qualtrics she spent 16 years as a Survey Methodologist at RTI International where she managed RTI's cognitive and usability laboratory.

She coauthored the 2017 book, *Usability Testing for Survey Research*, with Jennifer Romano and has taught a short course on the same topic at conferences and organizations around the world. She is Editor-in-Chief for the journal *Survey Practice*. Emily also teaches a graduate course on Questionnaire Design at the University of North Carolina, Chapel Hill. She received a MS in Survey Methodology from the University of Michigan and a BA in Psychology and Statistics from Mount Holyoke College.

Dr. Jennifer Romano **UX Research Lead and Manager at Google**

Jennifer Romano is a UX Research Lead and Manager at Google, and an instructor at UC Berkeley Extension. She specializes in efficient applications of research methods to ensure scientific rigor is not compromised while working fast to gain actionable results. Jen's research specialties include usability, eye tracking, survey design, experimental design, and cognitive aging. Jen is an established expert in the field – she teaches graduate-level classes, trains UX professionals, and coaches people who are entering the field. She is co-author/editor of *Modern Socio-Technical Perspectives on Privacy* (2022), co-author of *Usability Testing for Survey Research* (2017) with Emily Geisen, and co-author/editor of *Eye Tracking in User Experience Design* (2014). She has held UX positions in both industry (Facebook, Instagram, Bridgewater Associates, Principles by Ray Dalio, Fors Marsh Group) and government (US Census Bureau), and has worked as an independent consultant as well.

Jen is an established leader in the UX field: she is the founder of the mentorship program, webinar program, and short course program for the User Experience Professional Association ([UXPA](#)) and is a Board Member of the UX Quality Certification Center ([UXQCC](#)). She is the founder of **the** Research Challenge Workshop. She is past President of the UXPA, past President of the DC chapter of UXPA, past President of DC chapter of the American Association of Public Opinion Research (AAPOR), past Director of Marketing and Communications for the UXPA, and past Membership Chair for the Pacific chapter of AAPOR (PAPOR). Jen received a Ph.D. in Applied/Experimental Psychology from Catholic University of America.