

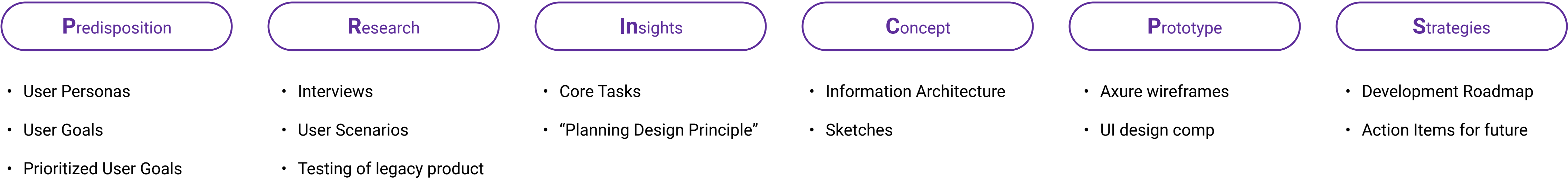


Planning of Planning



Presenter: Yao Bao, Interaction Designer
Project time: June 2017 - Present

PRInCiPleS Framework



Personae*



Amy
The Visionary



Casey
Compliance



Marcus
The Super Faculty



Fred
Faculty



Conrad
The Educator

** Personae are created and validated by the entire Product Team*

Personae - Amy The Visionary



AGE: 41 yrs-old

STATUS: Married

DEGREE: PhD Edu. Psychology

ROLE: Director of Assessment,
Office of Institutional Effectiveness

Evangelist The Expert

Aligning Pedagogy w/ Assessment

We have to get serious about assessment.

BIO

Amy has been recently brought into this new position to define the ultimate campus-wide assessment process. She has a grand vision for assessment and a plan to bring others on board.

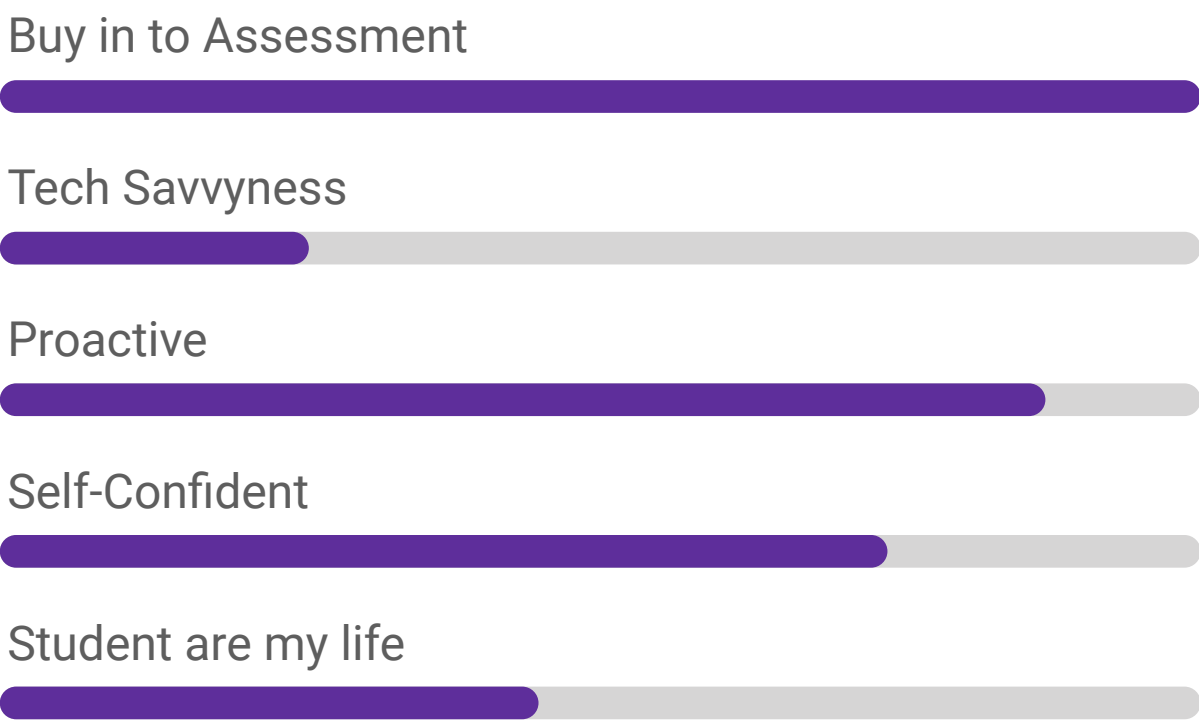
GOALS

- To use assessment findings to improve learning and increase the effectiveness of academic programs
- To generate statistically valid statements about program quality
- To prove the value of assessment to others
- To pave the path for future projects / departments / faculty

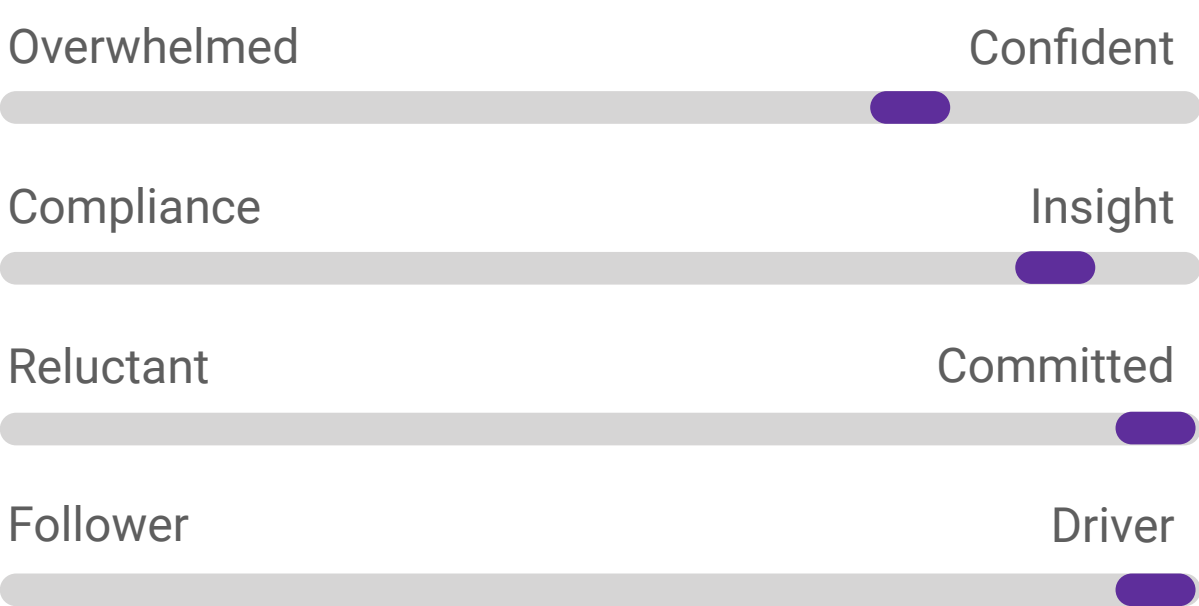
FRUSTRATION

- Other people don't see the value of assessment
- Faculty buy-in
- Low usage is a threat to her credibility
- Closing the loop is hard

ATTITUDES & SKILLS



ABOUT ASSESSMENT



Personae - Casey Compliance



AGE: 51 yrs-old

STATUS: Married

DEGREE: PhD Soc. Science

ROLE: Assessment Coordinator

Doer

Effective

Focused

Check- the-box

Someone needs to get things done around here, and that's me.

BIO

Casey has been a teaching faculty member for over a decade. She has definitely earned her place and knows everyone on the program by name. That's partly why she was recently designated to manage the implementation of her unit's program review process. She will be responsible for defining templates for contributors to provide data, track the completion of such contributions, and for making sense of all that data by putting together the final report to be presented to the accreditor body.

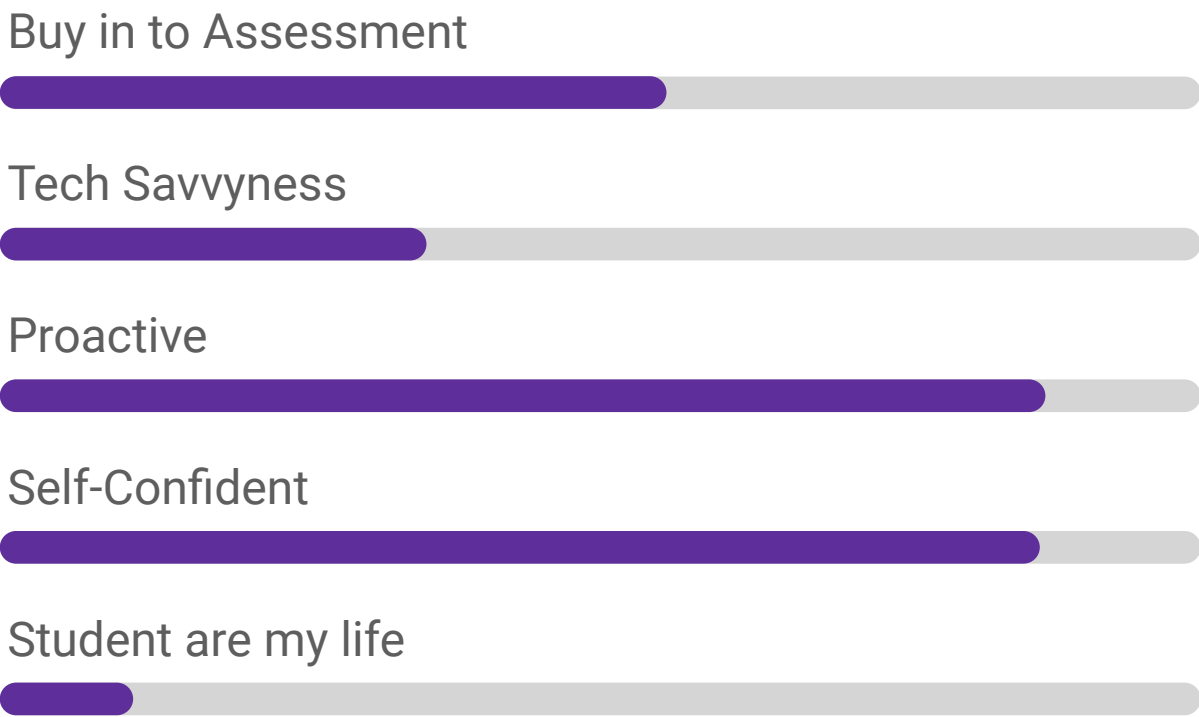
GOALS

- To document and track everything that needs to happen and make sure it's happening
- To help the university comply with accreditation standards
- To produce a complete and effective final report

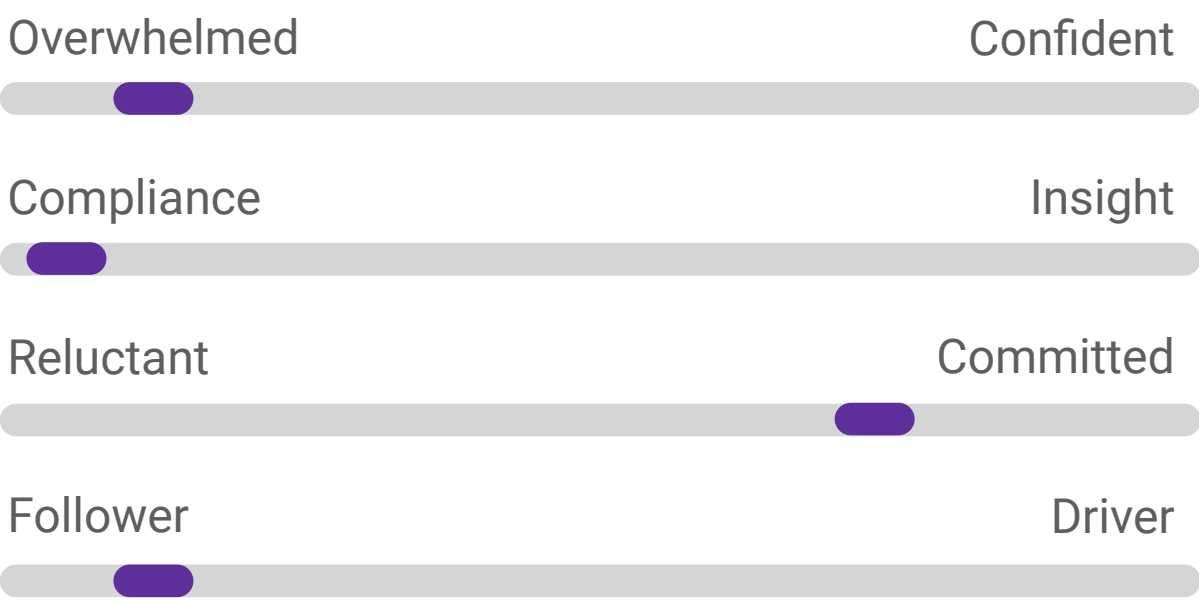
FRUSTRATION

- Getting everyone to provide data is hard
- Feels she's missing out on tool's functionality
- Poor tracking of what's getting done
- Communicating what needs to be done to others is challenging
- 'Where do I even start?'

ATTITUDES & SKILLS



ABOUT ASSESSMENT



Personae – Marcus The Super Faculty



AGE: 36 yrs-old

STATUS: Single

DEGREE: PhD Biology

ROLE: Professor of Biology,
Department Assessment
Coordinator

Collector

Analyzer

Show me your data !

BIO

Marcus is a faculty member who helps Casey collect data on outcomes for his program. He’s a Faculty of Faculty of sorts in that he believes in the power of assessment for his organization. He works directly with this faculty/staff to define goals, measures and the right data.

GOALS

- Seeing progress and improvement of program year to year
- Determining the outcomes that will be assessed in this year’s assessment plan for his department
- Selecting the measures for his program’s outcomes with direct collaboration of his faculty/staff
- Make sure his collaborators are delivering the measure results data he/Casey need

FRUSTRATION

- Data is often incomplete
- Needs to reach out to high-level Casey for Demographic updates (SIS integration)

ATTITUDES & SKILLS

Buy in to Assessment



Tech Savvyness



Proactive



Self-Confident



Student are my life



ABOUT ASSESSMENT

Overwhelmed

Confident



Compliance

Insight



Reluctant

Committed



Follower

Driver



Personae - Fred Faculty



AGE: 62 yrs-old

STATUS: Married

DEGREE: PhD Chemistry

ROLE: Adjunct Professor

Content Expert

Pedagogy

I know how to teach my class. I've been doing it for 30 years.

BIO

Fred has been teaching for years, and he's thinking about retirement. He loves teaching chemistry and hopes his students enjoy taking his classes. Fred understands the value of technology but is reluctant to incorporate it in his teaching because he sees it as a potential distraction.

GOALS

- To keep his classes interesting and relevant for his students
- To be a good chemistry teacher and to make sure his students are learning the subject.

FRUSTRATION

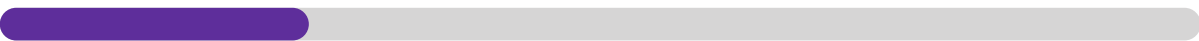
- Having to do things twice (grade and assess as separate activities)
- Having to manage student work in separate systems
- He has a lot to do and does not want to be told to do more
- He already assesses the learning of his students and doesn't want to be told what or how he should be teaching

ATTITUDES & SKILLS

Buy in to Assessment



Tech Savvyness



Proactive



Self-Confident



Student are my life



ABOUT ASSESSMENT

Overwhelmed

Confident



Compliance

Insight



Reluctant

Committed



Follower

Driver



Personae - Conrad The Educator



AGE: 35 yrs-old

STATUS: Married

DEGREE: PhD Biology

ROLE: Faculty of Biology

Collector

I have more important things to do.

BIO

Conrad is frustrated, by what he considers to be the "adminutea" that is required of him: providing data for administration purposes and creating rubrics and evaluations. Often this means re-entering information he already entered in Canvas. He resents the fact that he has to spend time on duplicative tasks that aren't part of the teaching process. He knows that not accomplishing his assessments can impact him professionally, and he has to do it, but even so, administration isn't a priority when he has thesis to review and course planning to do.

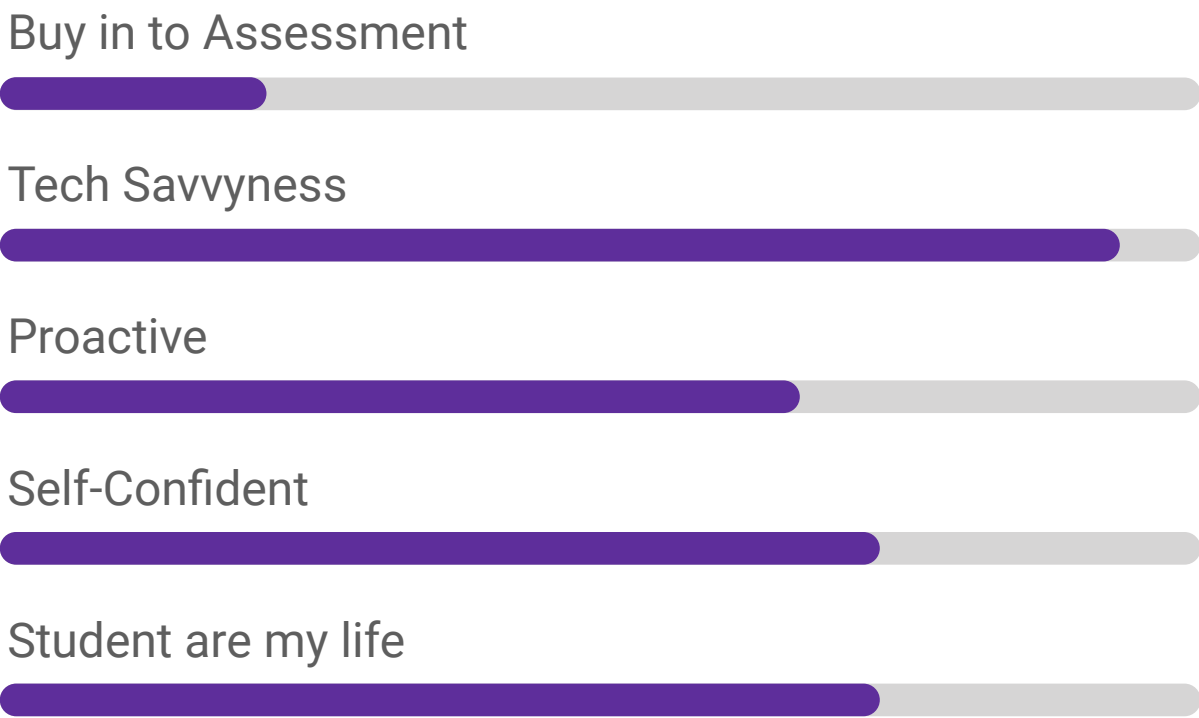
GOALS

- Get the administration done as quickly as possible
- Spend less time working on accreditation assessments and more engagement of his students
- Do the minimum assessment and share the results with students

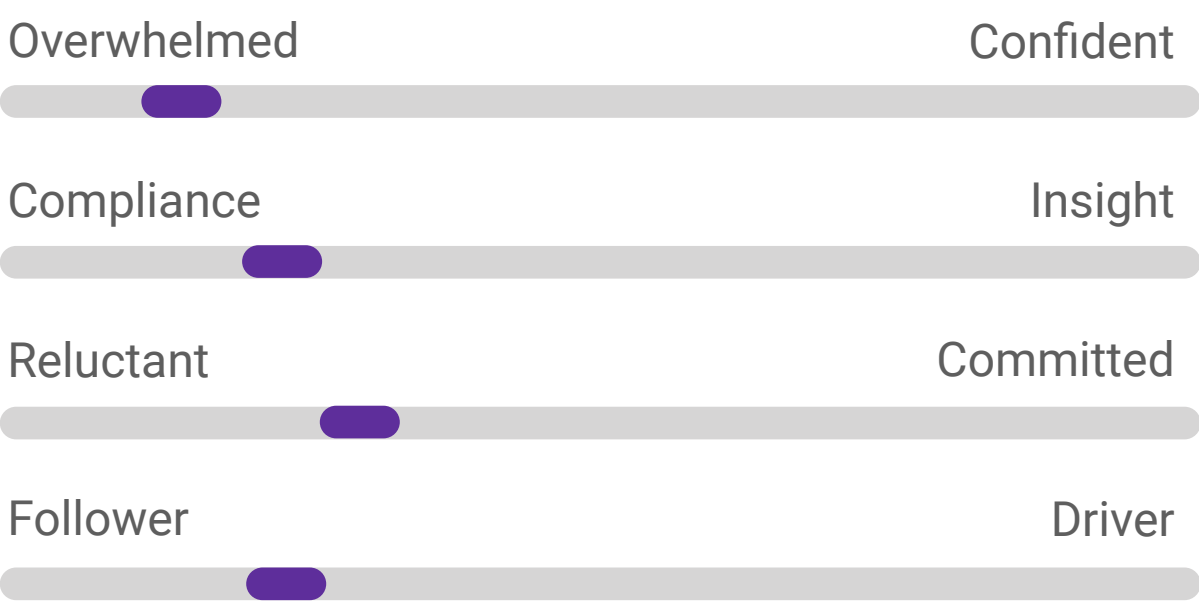
FRUSTRATION

- Doesn't know how to use the system and doesn't want to spend any time learning how
- Having to duplicate efforts in two systems
- Doesn't want assessment data to work against him

ATTITUDES & SKILLS



ABOUT ASSESSMENT



User Goals

Why do our users do planning? What kind of product do they want to use for planning?

Interviewee 1

“Schools and institutions do planning in order to **show** they are working towards **continual improvement** for accreditors, which are agencies that give a blessing or permission for schools to be able to confer degrees. We need to **see** the school is **meeting standards** and also looking towards to **exceeds standards**. The only way to show that data is to have a place to collect all the information that you collect, synthesize it, so that way you have a meaning, and connected to the things that you are trying to show compliance for. So to me **Planning is a hub** for all that activity to take place. **Easy of use, user interface**, that’s the first thing to attract customers. Can I **align outcomes with standard**....meet their needs. How **does the tool help me specifically not how do I build process within this tool.**”

Interviewee 2

“There are multiple reasons. The ideal version of why to do it, is to **improve their practices**, and **improve student learnings**. So really underline improve. The whole point of it is to improve what you are already doing. The second thing is **compliance**, like we need to **show** that our students are learning based on the target that we set ourselves. So we need to say that we expect our students to perform this level, and here is how we are tracking that, here is how we are doing that. **Stable; Easy to organize in one place; Allow analytics**”

Interviewee 3

“Two reasons. No.1 For **program improvement and student learning**. No.2 To **fulfill accreditation requirements**. Users value reporting and analytics. How easy and intuitive it is. If I was a director of institutional effectiveness, if I don’t need to spend a whole lot of time training my user, because the platform itself is explanatory, That’s gonna be a huge plus. It should be easy to enter data (including creating, editing objectives, plan data entry - measures, results, analysis and actions.)”

.....

As a conclusion, the two ultimate user goals are

Fulfill accreditation requirements

- An intuitive planning backbones to guide the planning process.
- Planning process goes well and can be done in time.
- An easy system to use so that less training is needed
- All the data collection can be done on time from all faculty members.
- Be clear how much training is needed. Feel confident in completing the planning job.
- All the plan members be aware of what they need to do and when they need to do it during the planning process
- A "plug and pay" data entry modal so that the process can be much easier.
- Data is entered at the right place.
- Report is easy to read and understand.

Improve program and student learning

- Everyone being able to see the lessons we learned during the past year.
- Clear purpose and value of what to be done.
- Feedback process to make sure we are doing the right thing.
- Track and report about who did what, and the quality of their work.
- Make sure the big picture of planning is on the right track.

User Scenarios

The planning is a long and complicated process. User scenarios and goals at different periods of time vary a lot. What do users need at different time?

I hosted a workshop and invited the entire product team to list all the possible user scenarios and user goals.

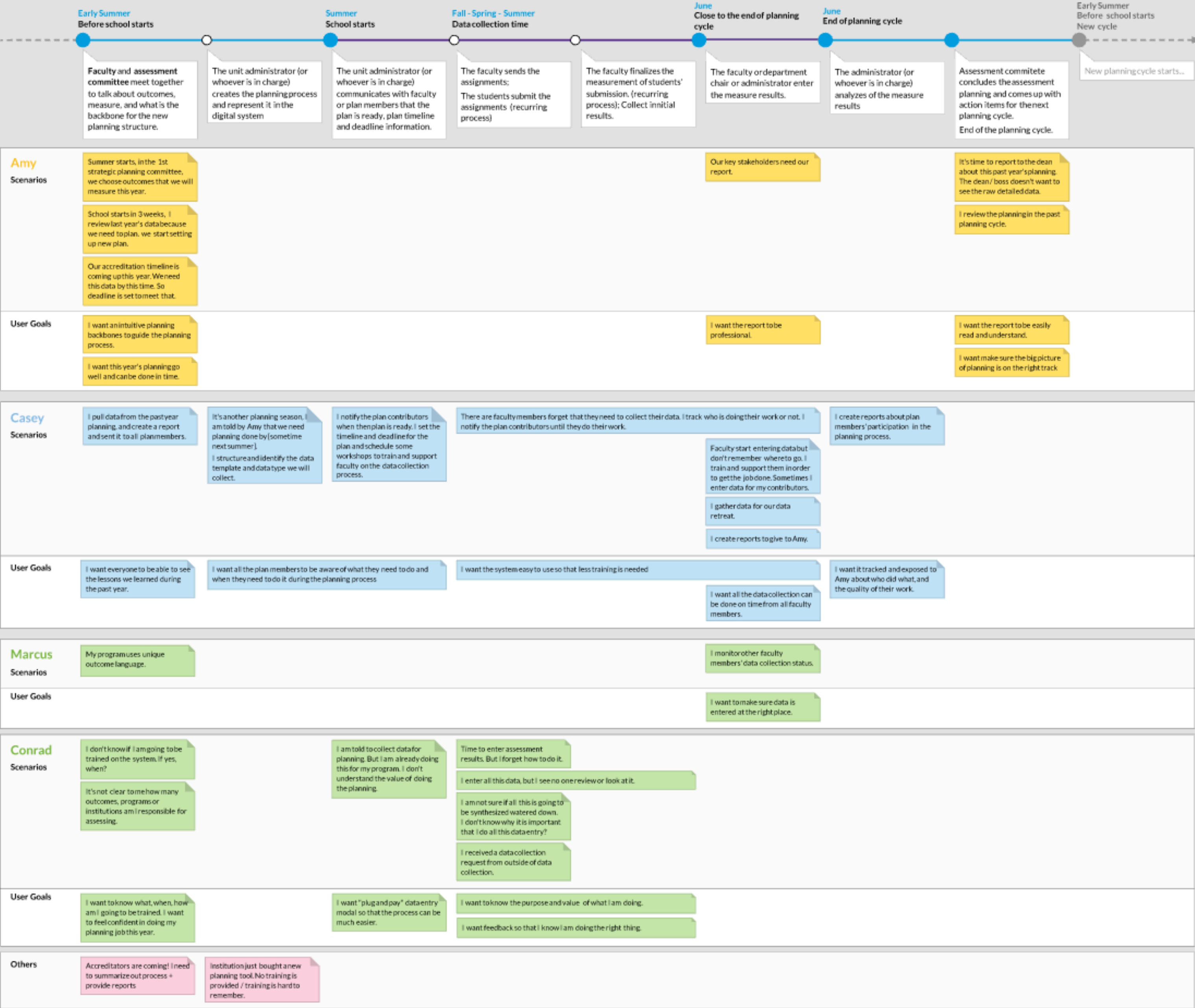
These scenarios are grouped into three stages:

- Getting Ready
- Data Collection
- Close the Loop

Another Scenario is “Onboarding”, which does not fall into this timeline.

PLANNING TIMELINE

Ultimate User Goals:
- Fulfill accreditation requirements;
- mprove program and student learning.



User Scenario - Getting Ready



Timeline & Deadline

It is early summer, 3 weeks before the school starts. Amy, as the assessment director, reviews last year's data because she needs to plan. She starts setting up the new plan.

The accreditation timeline is coming up this year. Amy needs this year's planning data by June next year. So she sets a deadline.



Build Plan

It's another planning season. Casey, as coordinator pulls data from the past year planning, and create a report and sent it to all plan members to show the lessons learned from last year.

Casey is told by Amy that this planning cycle needs to be done by sometime next summer. She builds the plan structure and identify the data template and data type they will collect.

Casey notifies the plan contributors when the plan is ready. She sets the timeline and deadline for the plans and schedules some workshops to train and support faculty on the data collection process.

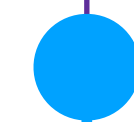


Select Outcomes & Figure Out What to Do

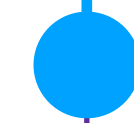
The assessment committee meet together to talk about outcomes, measure, and what is the backbone for the new planning structure.

Marcus's program uses unique outcome language. As a super faculty member, he is responsible for making that clear.

Conrad, as a faculty member who is asked to enter data, is not clear if he is going to be trained on the system. Conrad is not clear on how many outcomes he is responsible for assessing. He is told to collect data for planning. But he thinks that he is already doing this for my program. He doesn't understand the value of doing the planning.



Early summer
Before school starts



Summer
School starts



Fall - Spring - Next Summer
Data Collection



June
Close to the end of planning cycle



Late June
End of planning cycle



Summer
New planning cycle

User Scenario - Close The Loop



Prepare for the report

The key stakeholders need report for this year's planning. Amy needs to gather information and works on it when it's close to the end of the planning cycle.



Train and Track

There are faculty members forget that they need to collect their data. Casey needs to track who is doing their work or not, and notifies the plan contributors until they do their work. Faculty members start entering data but don't remember where to go, So Casey trains and supports them in order to get the job done. Sometimes Casey even enters data for the plan contributors.

Casey gathers data and creates reports to give to Amy.



Enter Results

Time for faculty members to enter assessment results. But Marcus forgets how to do it and have to ask Casey.

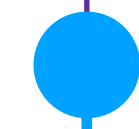
Conrad enters all this data, but he doesn't see anyone review or look at it. He is not sure if he is doing the right thing or not. He is not sure if all the data is going to be synthesized watered down. He doesn't know why it is important to do all this data entry?

Conrad receives data collection requests sometimes from outside of data collection.

As an assessment lead for his program, Marcus monitors other faculty members' data collection status.



Early summer
Before school starts



Summer
School starts



June
Close to the end of planning cycle



Late June
End of planning cycle



Summer
New planning cycle

User Scenario - Data Collection



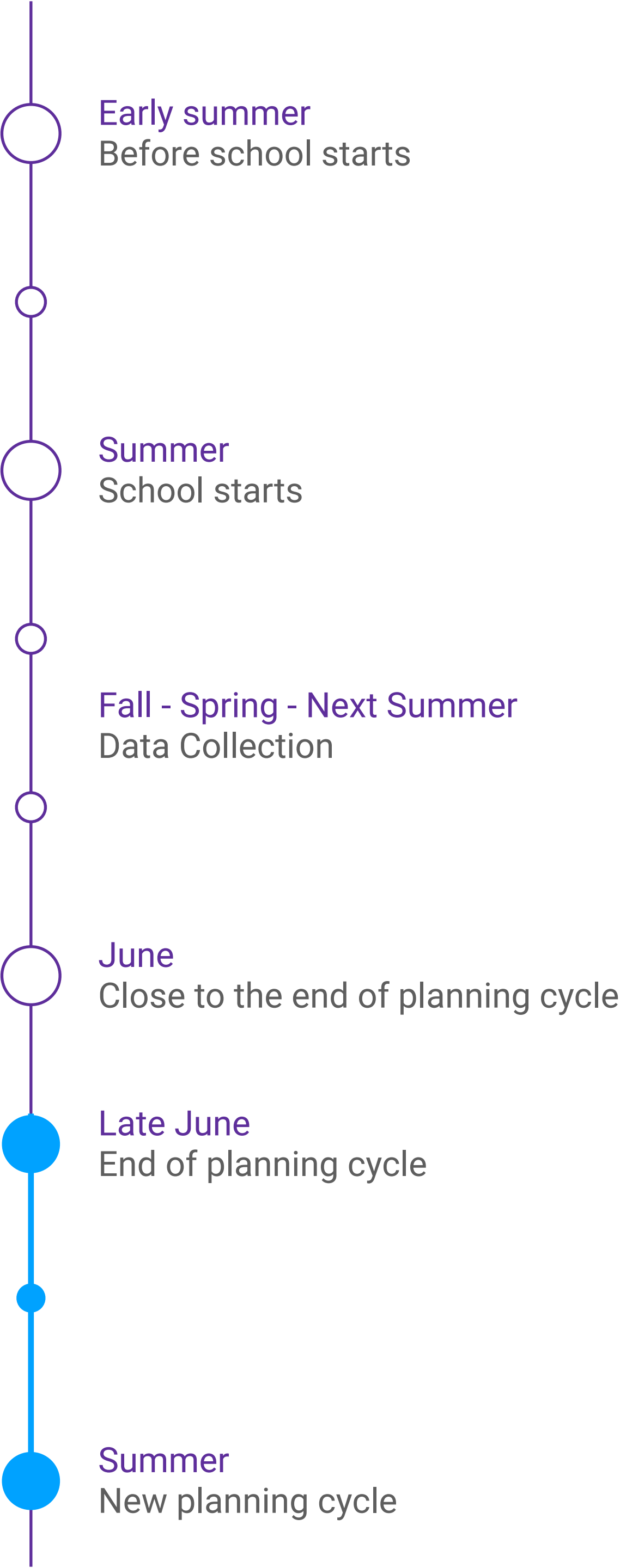
Review

It's time for Amy to report to the dean about this past year's planning. The dean / boss doesn't want to see the raw detailed data. So Amy needs to review the planning in the past planning cycle and have a comprehensive report.



Track Participation and Quality

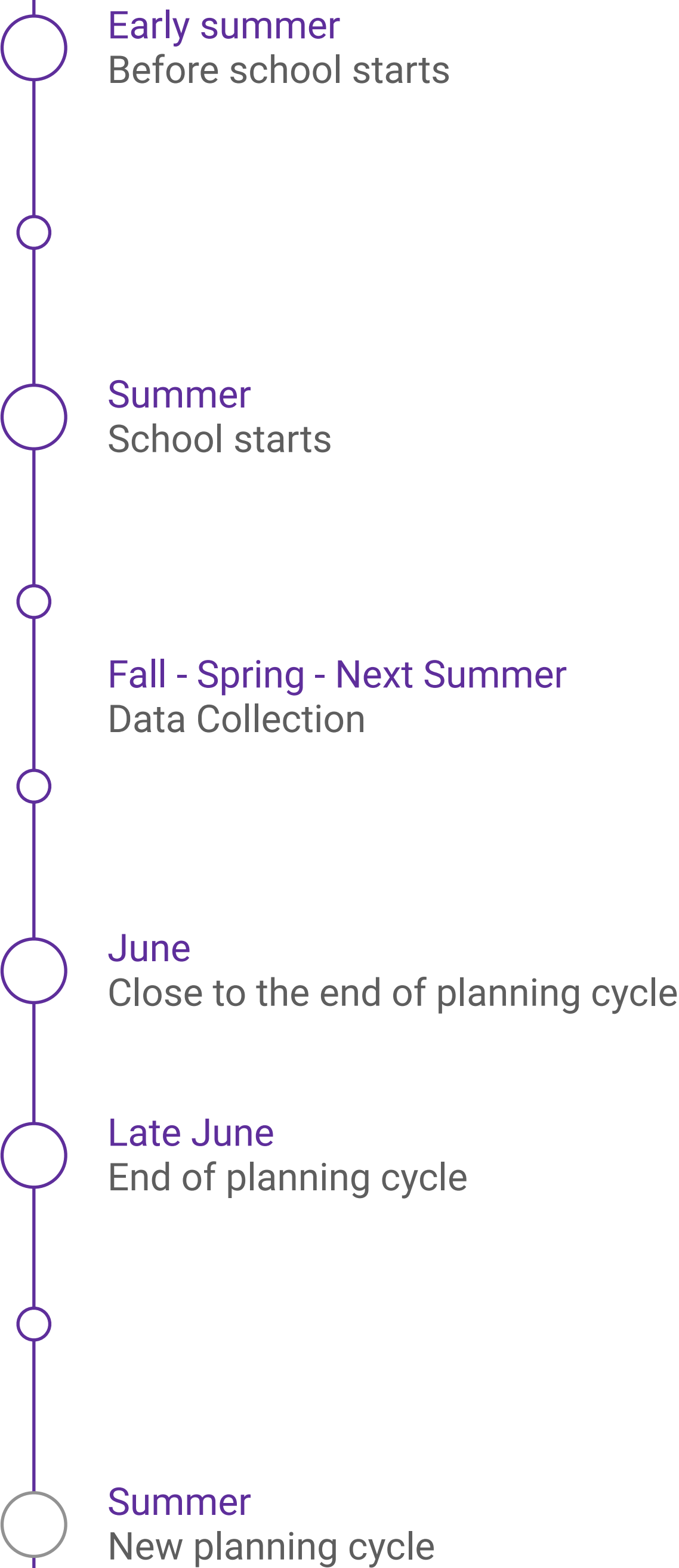
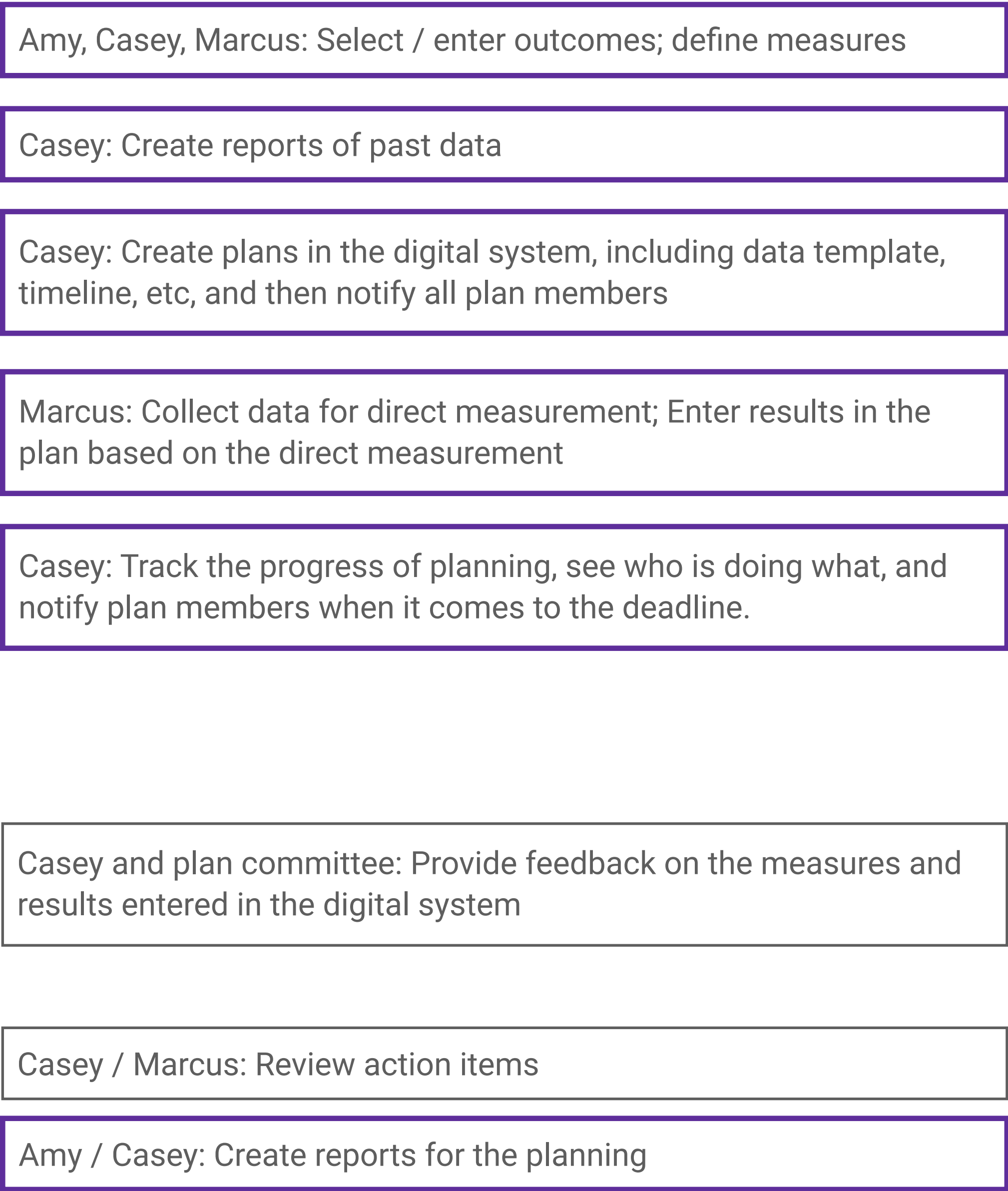
Casey create reports of plan members' participation and quality of work during the planning process and give it to Amy.



User Tasks

Extracted from the user scenarios, here are the main tasks during the planning process:

Bolded tasks are necessary for completing a planning process. These tasks would be our focus when designing and developing the new planning product.



Design Principles *

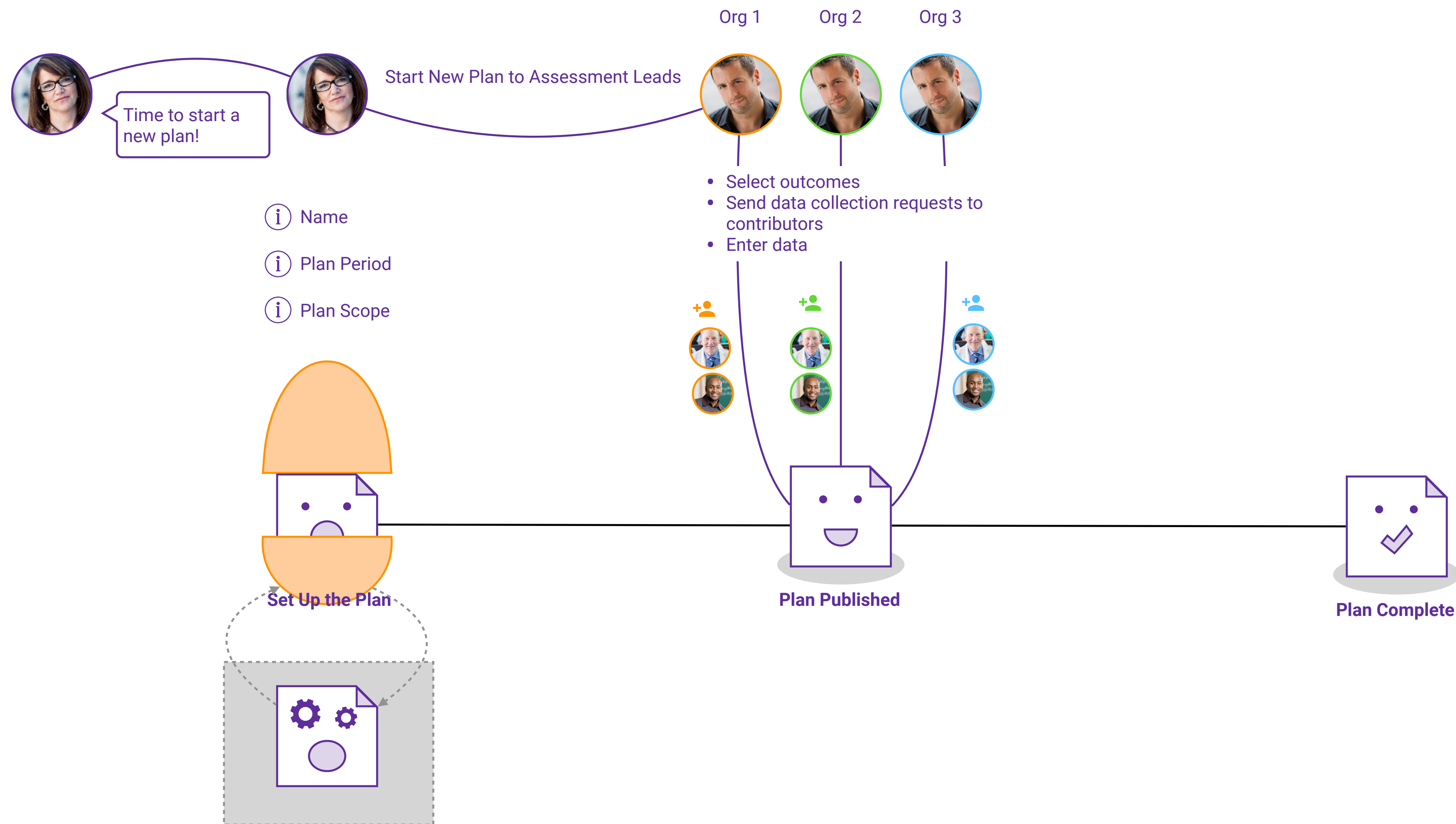
1. Resemble the user's world
2. Support positive assessment culture
3. Guide and support

** Design Principles are concluded by the UX team based on user goals, interviews, and the strategy from the company leadership. They should be applied to the entire platform UX design.*

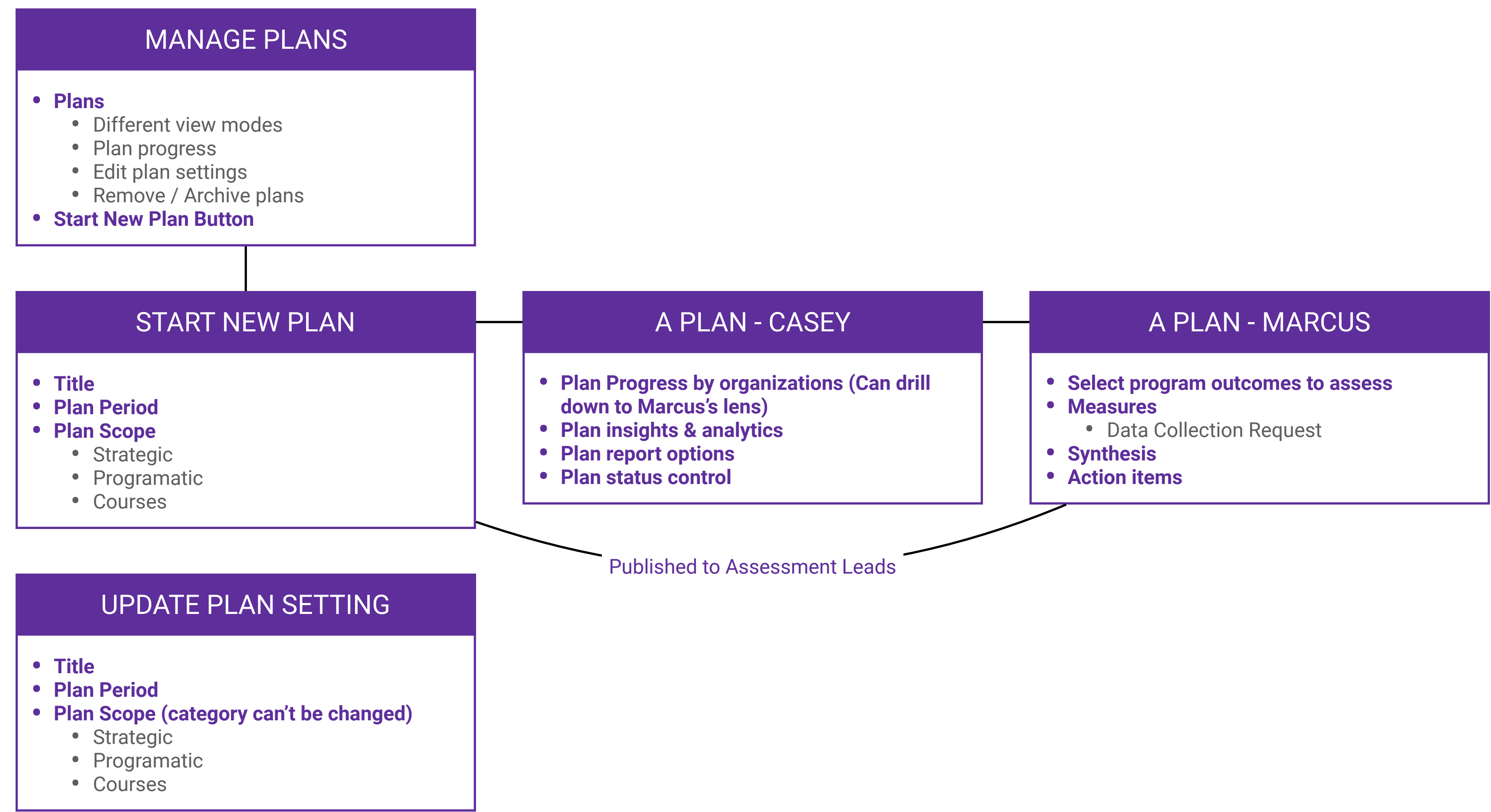
A “Lessons Learned” workshop was conducted to recall our user's pain points in our legacy planning products. I summarized some more detailed insights specifically for the new planning product design:

- Light weight workflow and interactions for the heavy-duty data collection needs
- Users should always know what to do, when and how to do their jobs
- We should design to encourage the best practice of assessment
- System roles need to align with user's responsibility in the real assessment life

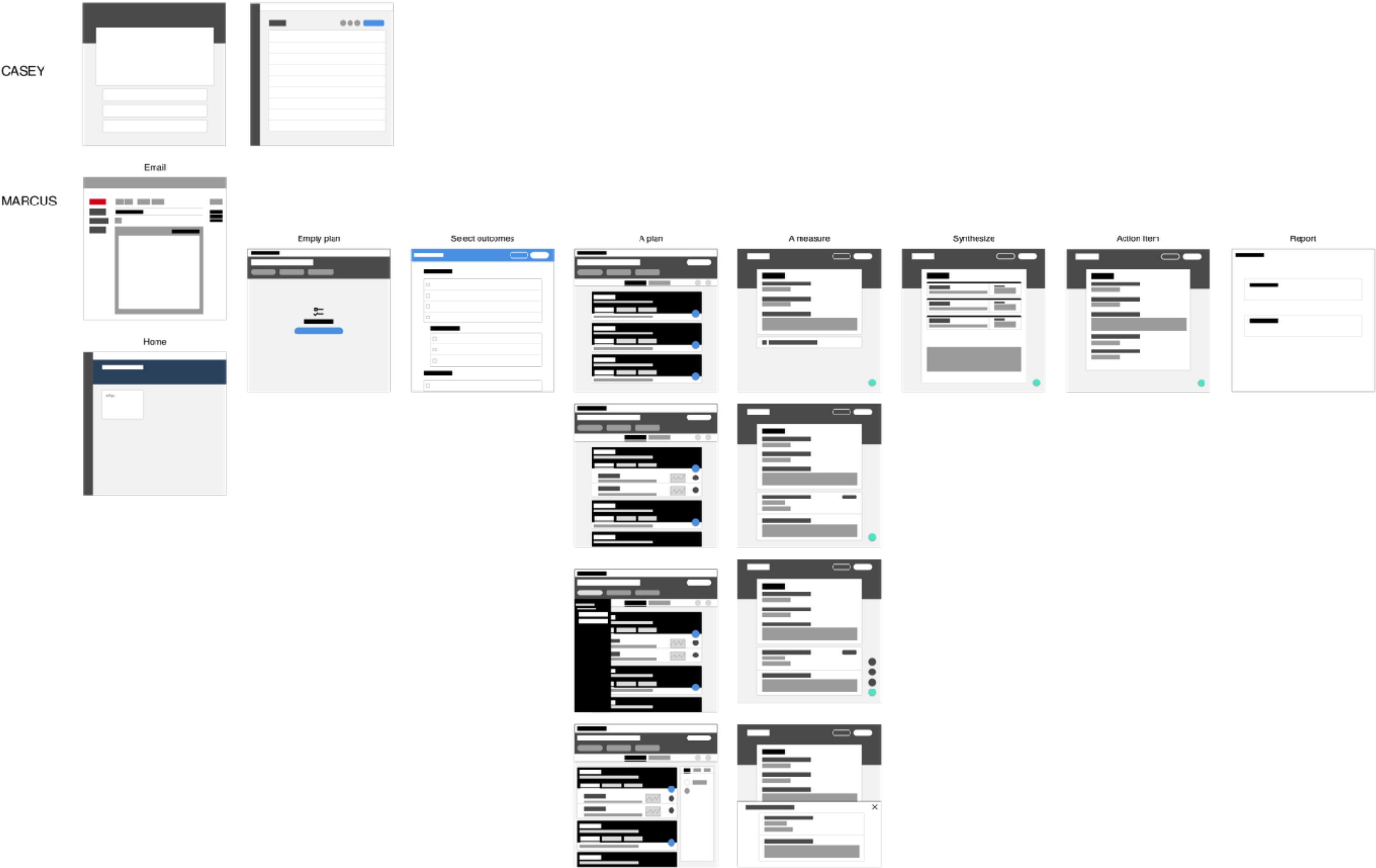
Concept - New Planning Journey



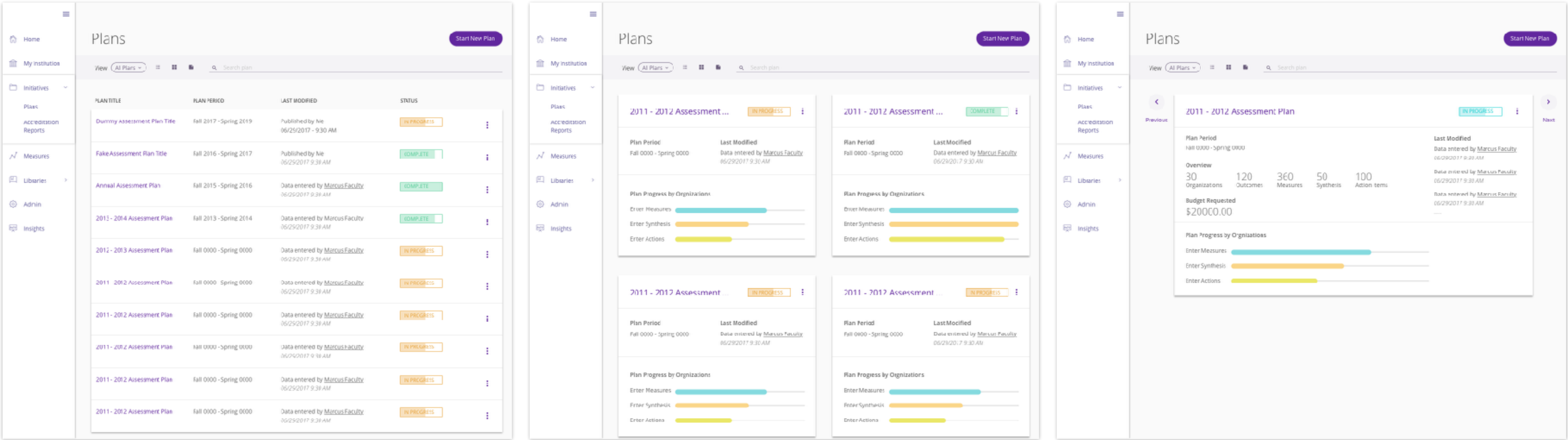
Concept - Information Architecture



Concept - Sketches



Design Wireframe



Plans Page - 3 Different View Modes

This is the page where Casey starts and manages plans.

Design Wireframe

✕

START NEW PLAN

PUBLISH

Plan title

Define Plan Period

Define plan organization scope

✕

START NEW PLAN

PUBLISH

This is an Plan Title

Define Plan Period

SHOW PRIOR YEARS

☐ Show selected Only

School Year 2017 - 2018

☐ Term 1 08/15/2017 - 12/31/2017

☐ Term 2 01/01/2018 - 05/20/2018

School Year 2018 - 2019

☐ Term Fall 08/15/2018 - 12/31/2018

☐ Term Spring 01/01/2019 - 05/20/2019

School Year 2020 - 2021

Define plan organization scope

✕

START NEW PLAN

PUBLISH

This is an Plan Title

Define Plan Period

Define plan organization scope

☐ Strategic Planning

☐ Programatic Assessment

☐ Course Outcome Assessment

✕

START NEW PLAN

PUBLISH

This is an Plan Title

Define Plan Period

Define plan organization scope

Organizational Assessment

☒ Autoselect Children

☐ Show selected only

Find organization by name

☐ University

10 goals

Amy Lastname

☐ Academic Affairs

10 objectives

Casey Compliance

☐ School of Business

10 outcomes

Marcus Superfaculty
Conrad Faculty

☐ Department of Business Administration

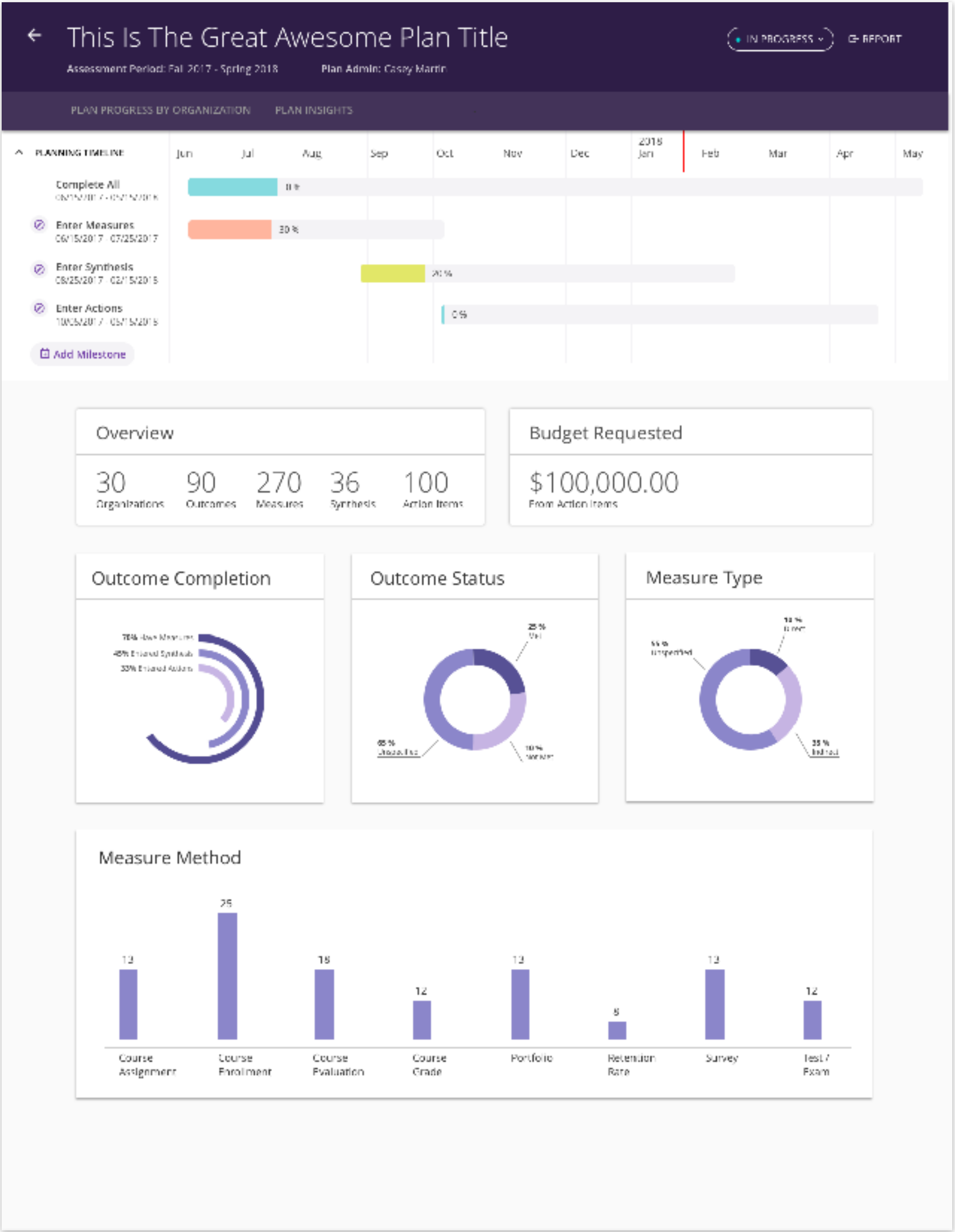
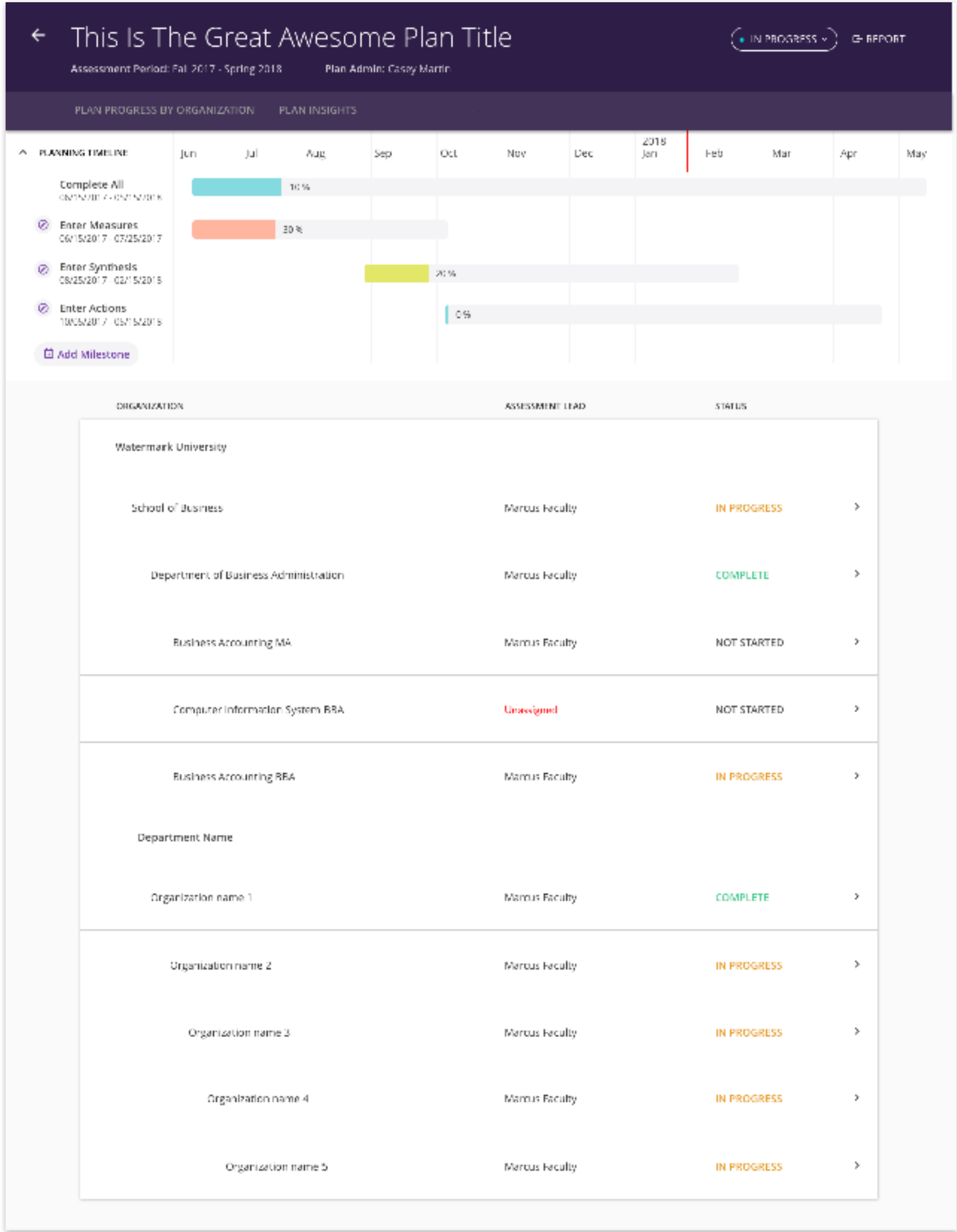
10 CLOs

Food Faculty

Start New Plan

Casey starts a new plan by defining plan title, plan period and plan scope.

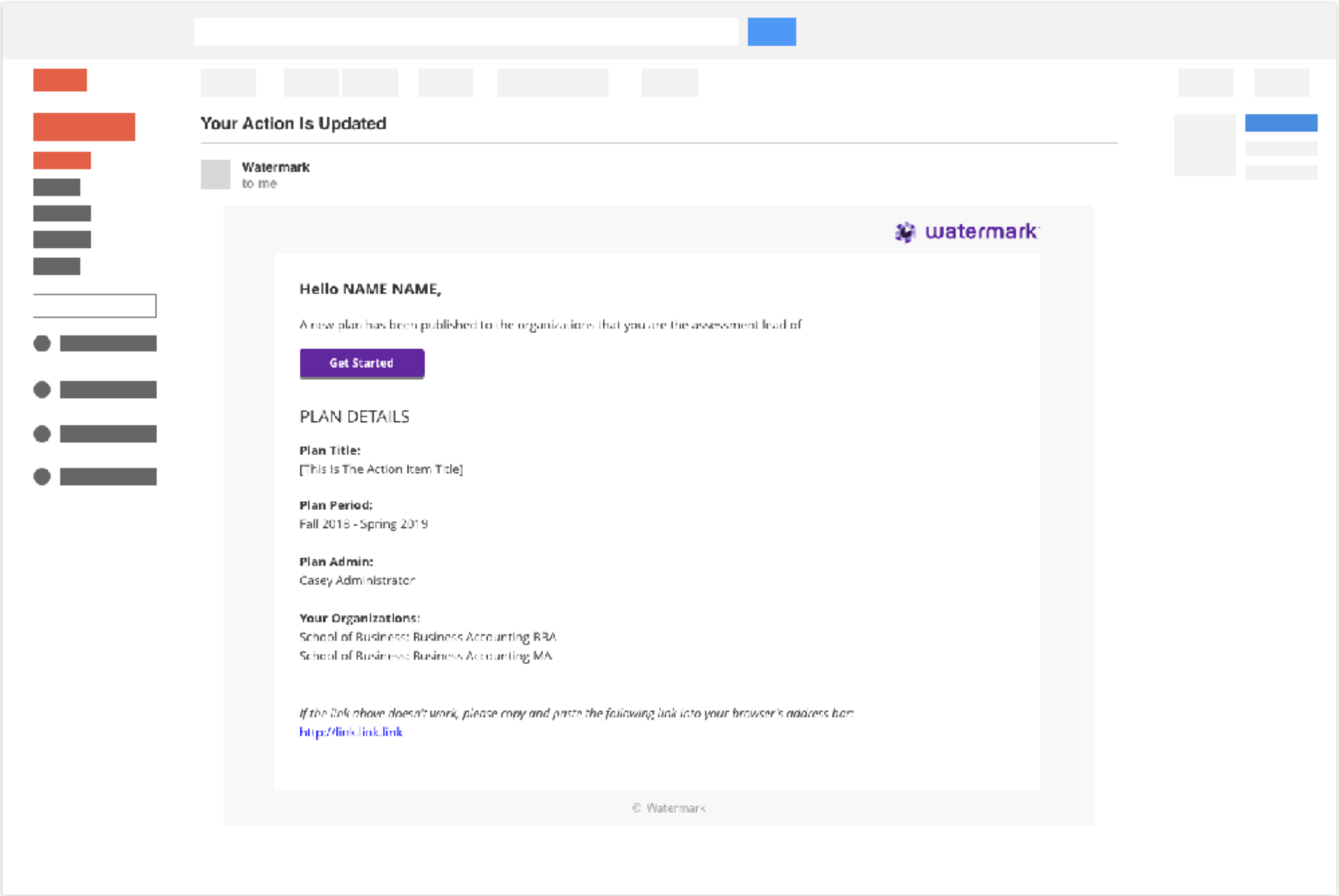
Design Wireframe



The plan page for Casey

Casey tracks the data entry progress by organizations, and monitors the plan insights by the aggregated data diagrams.

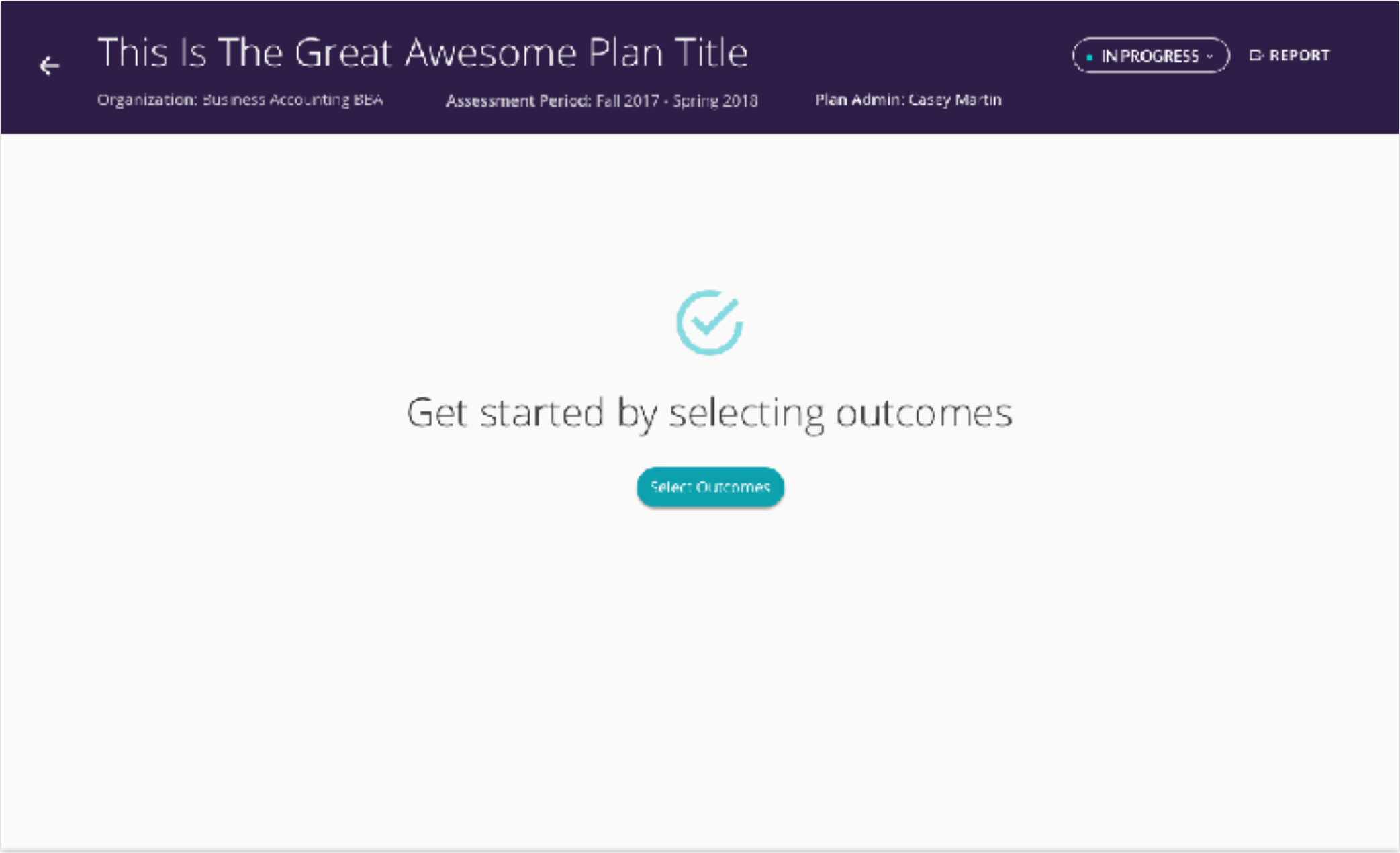
Design Wireframe



Email Notification

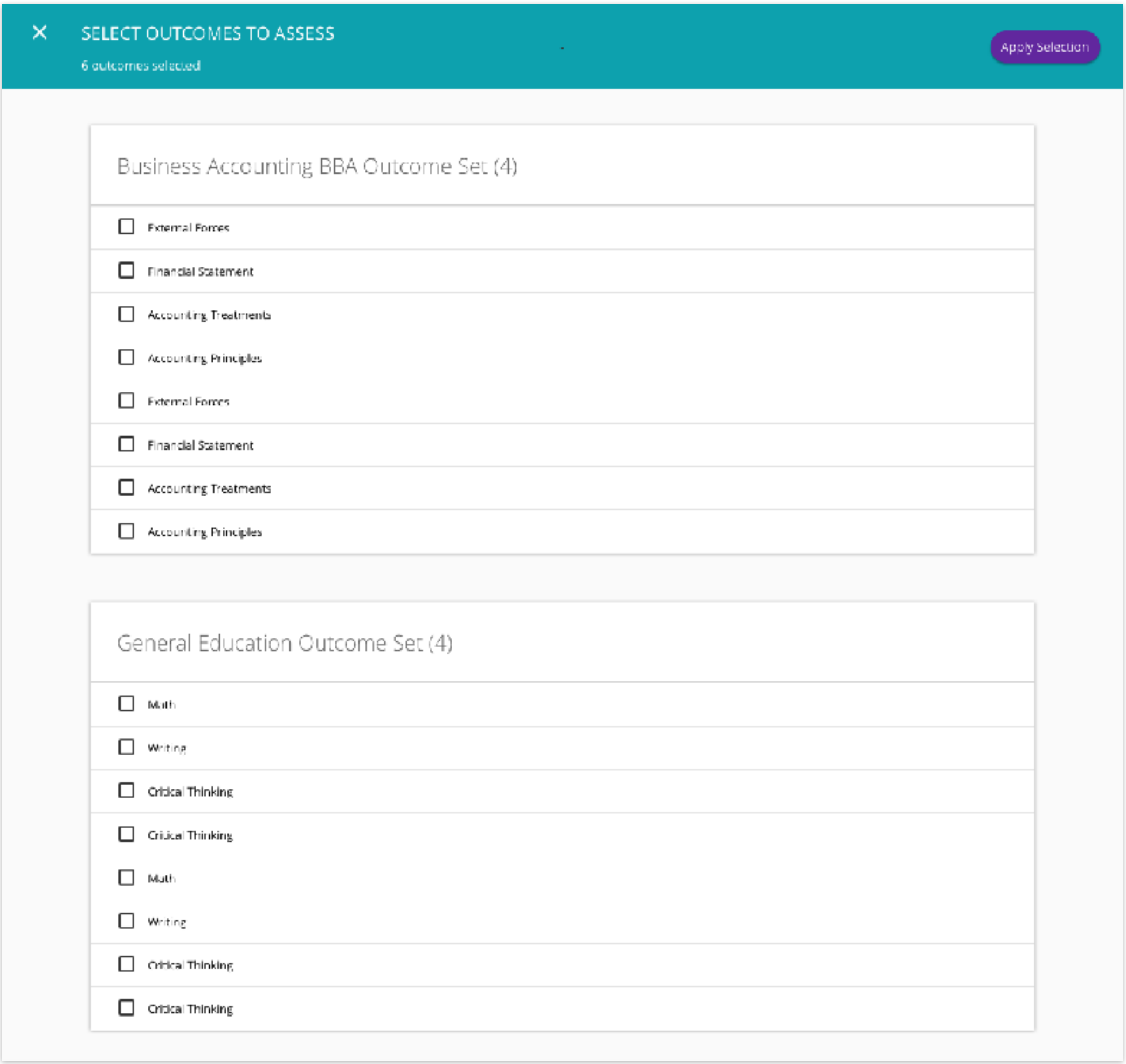
When the plan is published by Casey, an email notification is sent all the assessment leads included in the plan. As an assessment lead, Marcus clicks on the link and enter assessment results there.

Design Wireframe

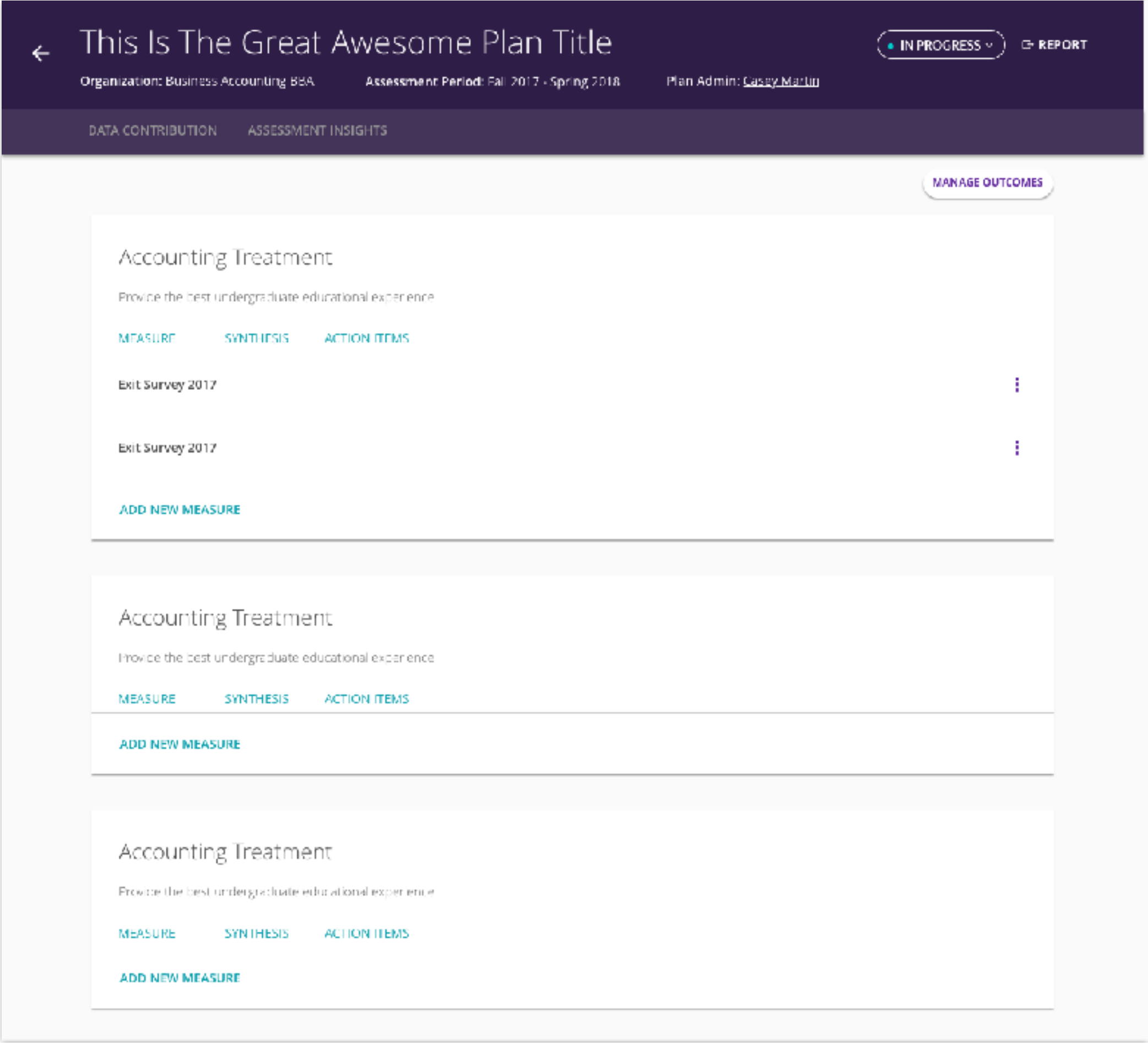
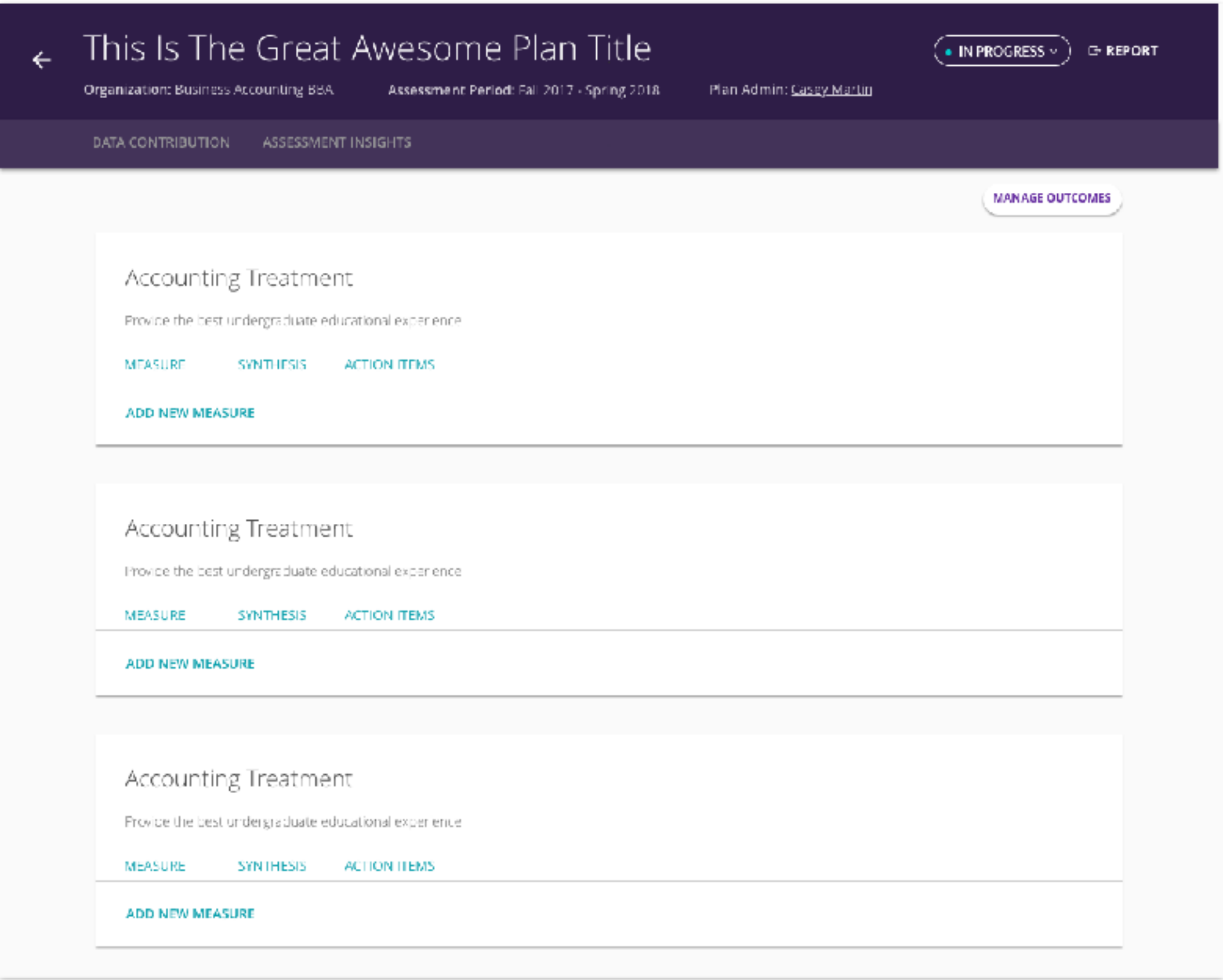


Empty Plan and Select Outcome Page

After clicking on the link, Marcus will get an empty plan where he selects the outcomes to assess for that academic period.



Design Wireframe



Assessment Data Entry Page for Marcus

After selecting outcomes, Marcus will need to enter measures, synthesis and action items for each outcome. Casey can also drill down to this level to read the entered data from her plan page.

More to Come

We are still working on more

- Iterate on the measure, synthesis, action item form page
- On measure page, Marcus can create data collection form and rubric and send them to Course leads to get quantitative students data and assess whether the measure is met or not met.
- More fields on action item page.
- Unit administrator should be able to track the completion status for created action item..
- Casey would also start strategic plans for high-level institution goals and synthesis.
- Casey would also start course outcome assessment plan for course outcome assessment.