

Coaches Online Support System (COSS) Design Document

Mission Statement

The COSS will scaffold the coaching process and support the coaches through the task of coaching the performer through an online tool.

Site Objectives

Scaffold the Task

Since understanding and accomplishing the new task of coaching would place significant cognitive load on the coaches, the primary overarching goal of the OSS was to reduce that load by scaffolding the task. The challenge was to identify and incorporate as many aspects of coaching that could be migrated away from the user to the OSS.

Provide Support and Resources

The second goal of the system was to support the coach in the difficult task of coaching, especially in preparation for interactions with the aspiring leader that require a high degree of delicacy or deftness. Accomplishing this goal required analysis of the skill sets and backgrounds of the coaches selected for the program along with the tasks they were asked to take on as coaches. The timing of the first iteration of the OSS will only permit designing in anticipation of the problems faced by the coaches. Thorough analysis of the user including personas, scenarios, and goal identification will help illuminate general characteristics found across coaches. Detailed task analysis will reveal duties with which the typical coach might have difficulty and therefore should be targeted as topics around which specific support material should be developed.

Calibration

The third goal of the system was to maintain inter-rater reliability by providing grading calibration opportunities for the coaches. After the introductory training session, coaches are sent back to their districts to engage with their aspiring leader and begin working through the coaching program. GLISI realizes it is essential for each coach to be in relative agreement on which performances are 1s and 2s and which are 3s and 4s. Since bringing coaches who are scattered throughout the state of Georgia back for regular group calibration sessions is both expensive and time-consuming, the OSS is a perfect candidate for shouldering the responsibility of calibration. Deciding where to do calibration was an easy decision compared to the how and how often we should do it.

The stakeholders

- Primary stakeholders are the coaches who will be interacting with the system.
- Secondary stakeholders are the GLISI staff members who commissioned the creation of the OSS.
- Tertiary stakeholders are the members of the collaboratives (universities, districts, schools), the Executive Committee, and the Georgia Department of Education.

The users

The users of the system were homogenous in educational and career backgrounds. They were widely varied in terms of experience and comfort with technology. The coaches were actually selected based on the following criteria:

- Leadership
- School Improvement Expertise / Experience
- Proven Track Record of Positive Student Performance Results
- Passion for Performance
- Awareness / Use of “Best Practices” in the work of School Improvement
- Credibility as a Coach
- Emotional Intelligence
- Reflective Practice
- Proactive Approach to Problem Finding and Problem Solving
- Organizational Savvy
- Personal Integrity
- Interpersonal Skills
- Effective Communication Skills
- Technological Skills and Expertise

A unique aspect of this project is that the proposed design and goals of the system are used as part of the criteria upon which the selection of coaches was based.

List of Characteristics

- Selected from the collection of current IICs, collaboratives (North GA, Middle GA, First District), State’s Leadership Facilitators
- Some will be retired
- They are SMEs in School Improvement
- All users are currently living in the USA and most, if not all, were born in the country. All users are fluent English-speakers and most, if not all, have English as a first language.
- All users have a successful background in education, at least 20 years of experience as a teacher, leader, or support staff. They are selected to be coaches because of their successful background and their impact on K-12 education in the state of Georgia.
- All users were well into their careers when the internet began to play an important role in education. The users already had mechanisms in place for managing their classroom or their job that did not involve technology. Apart from some social pressure eventually felt by reluctant users, users could, for the most part, choose the level at which technology was integrated into their everyday work life. Therefore, skill level will range from avoidance of technology to eager incorporation of technology into daily activities. Minimally, we can assume they know how to use the mouse and the keyboard. They understand terms like email, click, browse, download, and search in terms of the web. They can find files saved on their hard drives and understand document format type differences like Word and PDF.
- Some users may think the EPSS is an unnecessary addition to the coaching task. They may feel the tool does not provide value and would rather not use it.
- All users are going to be somewhere in the range of 40-65 years of age.
- All users of the system are highly educated. Most will have graduate degrees in an education-related field.

User Personas

These personas are longer and more detailed than what is typically recommended. The reasoning behind including more detail is that past experiences with mentoring and school leadership are important for gaining understanding of the range of levels of motivation and enthusiasm with GLISI's coaching program in general as well as the web tool specifically.



Marlene, technology avoider
Age: 53

Marlene is a newly retired principal just finishing up her last year a few months ago. She began her career in education in 1975 at the age of 22 teaching math and science. After twelve years in the classroom and three different principals ranging from wonderful to barely tolerable, Marlene decided she would like to move into school administration. After five years of earning credits and awaiting a good opportunity, she accepted a position as vice principal at an elementary school in her county. She was very happy as a vice principal and learned a lot from her principal who, seeing that Marlene would make an excellent principal, took time to expose her to situations and challenges regularly faced by principals. He believed in Marlene, so when a principalship came open at a nearby school three years later, he eagerly gave her a sparkling recommendation despite regretting to lose her. Marlene kept in regular touch with her mentor until he retired several years ago and moved to Florida.

Though computer and internet use in education has risen sharply in recent years, Marlene has not been quick to follow. Though innovative in many ways in her career, Marlene is not comfortable using computers. She has never taken the time to build a basic skill level because she has never identified any real value in using them. In short, Marlene thinks she is much more efficient when she doesn't waste time fiddling with the computer. One application, Microsoft Word, Marlene does use for typing up documents she wants to disseminate to her staff. Typically, after she enters the content, she sends it to one of her secretaries to format it so that it looks nice, she also calls on her secretary to help her view attachments and send email with Microsoft Outlook. She doesn't attempt to use the calendar or contact features in Outlook as she prefers to keep her schedule and contacts in a date book she always carries with her. Marlene does not use email to correspond with friends, but does use it to respond to her daughter who lives out of state. Luckily, her husband, becoming quite savvy over the years with the computer, helps her when she runs into a problem. Nevertheless, if Marlene needs to ask her daughter a question, she always uses the telephone. In her free time, she prefers gardening, teaching her dog new tricks, and helping out at church.

Marlene is excited to be a part of the Rising Stars program as a Performance Coach. She firmly believes in the power of the principal to inspire change in school. The opportunity was perfectly timed, just when she was facing retirement and the wonderment of how she would fill all her newfound free time. Marlene feels she has gained useful insight over the years as both a teacher and a principal about what makes an effective school leader. Also, since she was mentored so effectively early in her career as an administrator, Marlene sees this as an opportunity for reciprocity that never presented itself during her years as a principal.



Frank, technology adopter
Age: 60

Frank has been in education for 33 years. Originally, he decided not to go to college opting instead to work in his father's electronics store after graduation. Along with encouragement from his girlfriend Pamela and extra savings, he enrolled in a college in southern Georgia. He earned a degree in education and English and began teaching ninth grade English at the age of 27, just shortly after marrying Pamela. Frank really enjoyed teaching, but figured if he was going to do it for the rest of his life, he may as well earn the most he could. Frank was therefore motivated to go back to school to earn a Masters and EDD. Never intending to go into administration, Frank continued teaching. However, less than two years later, with the encouragement of his colleagues who felt he displayed effective leadership qualities, Frank applied for and received an assistant principal position. He enjoyed his new position and stayed there for six years until another opportunity opened up in a school located closer to his home. Three years later, the principal retired and the teachers rallied around Frank to replace him. Frank took on the head role at the school. He implemented new policies that both teachers and parents agreed positively impacted the school for change. Among these new policies were new computers in all classrooms and online grade submission and parental notification by students. Frank's school was among the first to adopt technology as a means of closing the gap between teachers and parents. Five years ago, Frank decided to move onto the district office to become the superintendent. Due to the success of his programs as a principal, Frank believes technology can help improve students' academic experience. He believes it is up to school leaders to promote this type of positive change at the school level and he wants to support those leaders.

Although Frank is aware that something must be done to improve student achievement in Georgia to meet the requirements of the No Child Left Behind Act and believes better preparation of school leaders may be part of the answer, he is afraid this initiative will fall by the waste side as he has seen so many others do over the years. Frank fears that the money granted to GLISD to get the Rising Stars initiative off and running will be wasted on non-essentials, which will cause a removal of funding a couple years down the road. He doesn't want to be cynical, but he's seen it all happen before.

Pamela, a veteran school secretary, shares Frank's apprehension of getting totally behind this latest initiative. She has lent an ear many times in the office while teachers and administrators have complained about the fleeting nature of school improvement initiatives. However, she thinks Frank would make a wonderful coach and mentor to an up and coming school principal because he too has benefited from the support of others over the years. Kind words of encouragement and helpful critique have been the starter ingredients Frank used to make a wonderful career in school leadership. She knows Frank would find an opportunity to shape the next generation to be thrilling.

User Goals

Marlene, technology avoider

- To avoid frustration
- To use the tool as little as possible (because technology is always frustrating)
- More focused on face-to-face time with individual
- Gives her performer her phone number

Frank, technology adopter

- To be more efficient
- To use the tool to improve the coaching experience, make his time spent both with and without the performer more productive
- Gives his performer his email address

Use Cases

1. Review the task and goal for the current coaching step

2. Print, edit, or review documents for use during face-to-face meetings and/or practices with performer and/or collaborative members
3. Obtain guidance on accomplishing a difficult task
4. Read best practices written by a fellow coach
5. Review coaching guidelines for a particular situation
6. Refresh memory of grading standards

Scenario of Use

The scenario of use uses the Marlene persona because hers is a skill and interest level that requires the special consideration of designers.

It's 9:30 p.m. and Marlene thinks to herself how the time has really gotten away from her today. She is a little irritated that she has waited this late to review and download her materials for tomorrow's initial meeting with her performer. The principal who recommended the performer, Vanessa, for the Rising Stars program noted that she has many assets when it comes to leadership, but occasionally she can be a little headstrong. Although the principal has recommended Vanessa be allowed to exempt several of the modules, he still believes she needs to practice about 70% of them. Marlene suspects Vanessa may believe she should be allowed to exempt even more of the modules and may push back on the decision. Marlene has never met Vanessa, but has handled personalities such as hers during her long career in education. She isn't worried, but Marlene wants to have time to think about the most tactful way to approach Vanessa and wants to review the helpful tips she knows are on the website for situations such as these. After all, she has had good relationships with her other two performers and wants to establish a good one with Vanessa tomorrow.

Marlene's husband has given up the computer chair to her, so she plops down. She goes to her Favorites list and selects LPPC Support Tool from the list. The page opens up with "Welcome Back, Marlene!" Since Marlene is in the Pre-Coaching with Vanessa, she selects Pre-Coaching and sees her checklist for this stage. She has previously reviewed all of the information provided to her about Vanessa and agrees with her principal's recommendations. Marlene finds the link to the "Review Performance Plan with Performer" job aid with "Word" beside it and clicks it. This one indicates she will be opening a Word document as opposed to a PDF. She thinks Word documents are easier to deal with. When the file opens she prints it.

Then, Marlene wants to find suggestions on how to deliver news that a performer may not want to hear. In this case, the news is that Vanessa will have to practice and pass modules for areas in which she believes she has already proven competency. Vanessa may feel embarrassed, annoyed, or even somewhat betrayed by her principal for his recommendation. Marlene wants to keep the entire situation very professional and ends-focused. She finds suggestions on the website such as how to point out differences in the ways Vanessa has practiced a role before and how she will need to be able to fulfill it as a principal. She also finds that it may be worthwhile to point out that Vanessa's work in that role occurred several years ago and a time statute exists for the assessments. She also finds ways in which she can depersonalize the situation by taking the spotlight off Vanessa and her principal and focusing it on the requirements of the Rising Stars program. Last but not least, she should let Vanessa know that if she feels competent in that skill, she can go right on through to the assessment.

Marlene is satisfied that she has armed herself with several soft tools she can use tomorrow in her meeting with Vanessa. She selects the suggestions she feels best work for her and prints them off in a customized job aid for review before tomorrow's meeting.

Marlene closes the browser and goes to let her husband know the computer is all his again.

Design Motivation

Although GLISI was firm in their belief the OSS must be used by coaches, they did not want the tool to become a point of frustration or inefficiency. GLISI's main motivation for implementing the tools is to reaffirm for the coaches what they had learned in the training session that introduced them to the program. They hoped the tool would provide the necessary scaffolding and support the coaches needed to be successful instead of fielding numerous emails and phone calls to address questions on an individual basis. This scaffolding and support consists of providing access to the forms and documents needed at the appropriate time, guidance on how to handle difficult or peculiar situations, answers to specific protocol questions, and grounding opportunities to ensure coaches have similar expectations.

System Requirements

Functional Requirements

The tool shall...

- Provide access to coaching modules.
- Provide the ability to download and/or print documents and forms contained in the coaching modules.
- Provide access to tips and techniques for tackling difficult or sensitive subject matter relating to the coaching modules or coaching in general.
- Provide access to Rising Stars modules.
- Provide ability to download and/or print documents and forms contained in the coaching modules.
- Comply with Section 508 usability guidelines.
- Function properly in current and most previous versions of Internet Explorer, Netscape, Firefox, and Safari.
- Require a login id and password that is stored in a persistent, non-destructive state.

The tool should...

- Provide context-sensitive help.
- Provide the documents in both PDF and Word format and a link to download the free Adobe Acrobat reader.
- Limit access of some parts of the site to some users.

Non-functional Requirements

The tool shall...

- Have a unified navigation scheme modeled after the user's order of interaction with the system.

- Promote learnability through use of consistent menus, layout patterns, method of feedback, phrasing of content, headers, and style.
 - Promote predictability, synthesizability, familiarity, and generalizability
- Promote responsiveness such that the time between an act to change the state of the system and the system's expression that the state has changed should be stable.
- Promote robustness by way of task conformance.
 - Completeness - system provides all tasks of interest to the user
 - Adequacy - the user can understand how to complete all tasks
- Present an attractive layout

The tool should...

- Provide the user with a way to recover from error in a commensurate way.

The tool may...

- Support concurrent multi-threading such that the user can engage in two tasks simultaneously.
- Support task migratability by allowing the system to take over a task such as finding the next module to print or suggesting job aids the user may need during the next interaction with the performer.
- Support customizability by allowing the user to modify the interface according to the user's preferences.

Content Requirements

There are three main thrusts to the content on the site: structuring the coaching task, providing access to related documents, and providing support for the coach.

To structure the coaching task, the site will use concise wording to describe the task and the goal of the task. Only one task or task chunk will be displayed on the site at a time. The documents related to the task or task chunk will be linked on the page with the description and goal. Task and document wording is provided by the content writers, specifically Gale Hulme and Phyllis Payne. Wording can be edited for consistency or brevity by the designer, but changes should always be checked by the writers. The tasks and related documents will require extremely infrequent updating, if any at all, once implemented.

To provide support, the site will use a variety of prose styles; including question-and-answer, bulleted lists, and paragraph descriptions of situations and suggestions. Where applicable, support content will be linked directly with the task to which it applies. However, all support material will be accessible in a categorized format on a page of its own. Support content will be provided by the writers with input from the designer who is helping to identify areas where coaches may need additional guidance. Support content will be updated as the need arises, which will probably average around once a month during the initial implementation.

Interaction Design

Users of the site will interact with the site by clicking on links. Links are indicated with a different color and an underline. Hovered and visited links will be shown in a different color with an underline. Links that open documents rather will be grouped together or indicated with an icon.

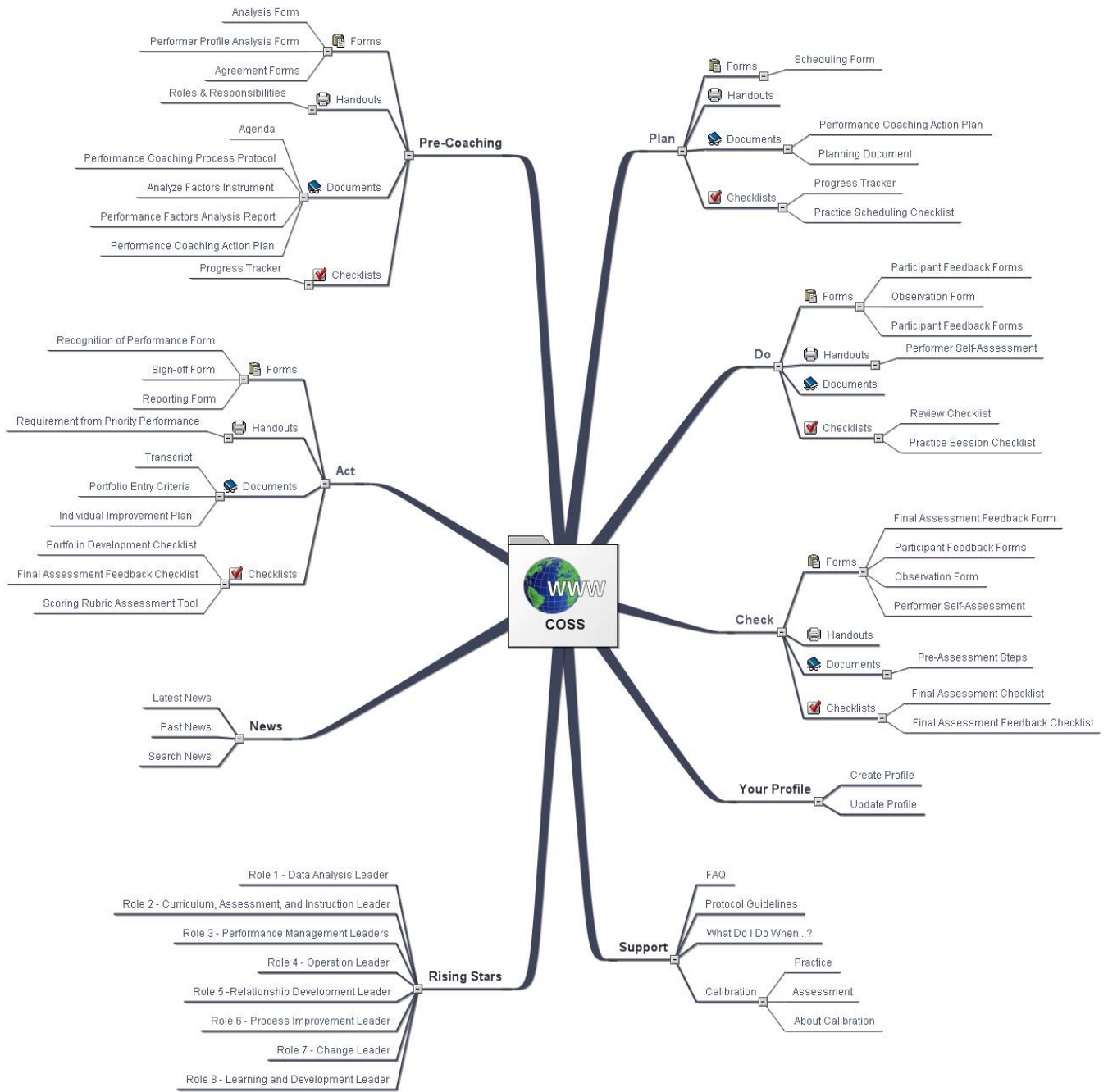
Site navigation will be presented in left side vertical links as well as horizontal, tab-style navigation at the top. The tab navigation will lead users through the Plan-Do-Check-Act model, while the side navigation will provide access to the support section as well as peripherals such as news, profile updates, site map, and search.

Information Architecture

The information on the site is presented in a style mixing hierarchical and organic.

Information Design

Navigation Design



Interface Design

Visual Design

Wireframe

The wireframe shows a web page layout. At the top, there is a grey header bar and a white search bar. On the left is a sidebar with a list of links: News from GLISI, Modules (Prepare, Plan, Do, Check, Act), Support for Coaches, Your Profile, Rising Stars, Site Map, and Search Site. The main content area features a heading "Click your stage in the graphic below (where you are with your performer)" and a link "How do I know what stage I'm in?". Below this is a diagram with a "Prepare" box on the left and a circular "PDCA" cycle on the right. The "Prepare" box contains the text "Get acquainted with performer and collaborative". The circular cycle is divided into four quadrants: Plan (Plan for Practice), Do (Practice and Practice Feedback), Act (Portfolio Review, Set new goals), and Check (Assessment and Assessment Feedback). At the bottom left of the sidebar is a button that says "Click here for RISING STARS Modules" with a star icon.

Appearance