

Usability Findings

Second Step Platform

Feature: Global + Program Navigation | Expected Release: July 2020

Executive Summary

We conducted wayfinding usability testing with 7 existing Second Step users as part of an iterative design process for the release of the new Second Step platform. By testing 2 designs using wireframe prototypes, our goal was to learn how well users were able to accomplish common scenarios within and between programs. The flows we tested focused on teaching lessons, finding reinforcement content, and accessing training and reports.

Overall, users were able to teach a lesson, access reports, activities, and training with ease. Finding supporting content proved to be a little more challenging in the Elementary kit IA than in Middle School digital IA. In general, admins and teachers agreed that they are most likely going to look for information in the “teach” and “training” journeys. Those that explored content were particularly enthused about family engagement and student assessment materials. Middle School users responded positively to the updated teach page design and all users found that most pages had the content they were looking for and expected.

Between the two designs we tested, users completed more tasks and with greater efficacy in the “top bar” design than with the “drawer” design. Once learning how the drawer worked, participants found both designs easy to use. The top bar design was easier to see where they were in the program and the drawer seemed to be more visually appealing. Between the two designs, our team feels that the top bar design will improve Second Step usability of the digital program. It will help create a contextual navigation experience and not a “junk drawer” of stuff. We believe that this design can improve the understanding of how the program works by highlighting its core components. This said, we do think that the top bar design will require more technical lift due to a greater number of permutations across devices, it will also require a stricter IA governance between different programs.

Included here are the most critical recommendation highlights, with greater details explained throughout this document.

1. Use of Top Bar Design (Finding 1)
2. Use Training-content and Resource-content with clear distinction (Finding 2)
3. Do not remove physical tools (such as classroom posters) in the K5 digital subscription. (Finding 3)
4. Revise Kit IA (Finding 4)
5. Include a “Prep” feature in Middle School (Finding 5)

Stakeholder Questions + Insights

Initial Questions	Study Insights
<p>Will users know what contents are in the drawer? Will they think it is a global menu or a program menu?</p>	<p>Before clicking on the drawer icon, participants were not sure what it might contain. About half the participants naturally discovered the drawer and opened the contents, the others did not engage until they had no other clue where to look for a task. Upon opening the drawer, participants could quickly tell that it is helpful content about that specific program.</p> <p>Baionne - 40:40, Middle School Leader Alicia - 15:45 – District Coach</p>
<p>Will users notice the top navigation changing sides when in a nested view?</p>	<p>No one explicitly mentioned confusion or surprise of the navigation switching sides. There were behavior traits of using the “back button” and some used the resources that were called out on the right.</p> <p>Baionne - 23:20</p>
<p>When and how often are program resources referenced in the programs? How visible do resources need to be?</p>	<p>In general, teachers expect everything relevant to be attached to either a lesson, unit, or concept. Participants mentioned that any supplementary activities should be mentioned in the lesson and that any teacher learning should be in the Second Step training. Administrators don’t expect or anticipate teachers to go looking for content outside of lessons or training.</p> <p>Alicia -17:35: Teachers think in grades and in lessons, activities are like an optional lesson in a class.</p>
<p>Will the users know what the “grid” global navigation option is? Will they like it? Would they use it?</p>	<p>There was mixed use and feedback of the grid. One participant said that she expected it to change the layout of her dashboard. Another participant said “Oh, that’s trickery” implying that it is a weird way to go home. We did observe that if participants found it they would learn it quickly and use it again intuitively. Both classes and programs were used as a way to get around.</p> <p>Curtis - 12:40: Switching program “I am going to guess it is this little grid up here” Alicia - 29:35: Using the global navigation</p>
<p>Are the elementary kit resources meaningfully</p>	<p>Several participants commented on that the resources made sense by “Overview” “Reinforce” and “Evaluate”. “Getting Started”, “Engage Families” and “Tracking Tools” stood out to teachers.</p>

<p>organized? How helpful do users find the content? What was confusing?</p>	<p>There is a lot of interest in “Classroom Strategies” but lower confidence in what would be there.</p> <p>Kelli - 55:10: “The list overall makes sense”.</p> <p>Alicia - 48:20: Could imagine integrating the resource content into the teach experience.</p> <p>Carolyn – 42:50: We are constantly looking for things to engage our parents.</p>
<p>In the middle school digital resources menu, what stood out? What was confusing? And how helpful do users find the content? Will “Activities” make sense?</p>	<p>We got very little confusion, if any at all, about the Middle School IA. Participants said “It has everything I would need” and “it looks pretty cut and dry”. We see this as a good sign that we edited the IA to what was needed and made it clear. On the top navigation bar, “Activities” were noticed and looked at more frequently. There was no strong concern between “Activities” or “Advisory Activities”, school leaders knew what that meant. Teachers were surprised to find that section, unaware of the content currently. There was a positive response to the Training and Support section. Family material and book lists were mentioned as helpful in one school’s implementation.</p> <p>Heather Anderson - 14:00: “We are seeing cool things around the book lists,”</p> <p>Baionne - 28:50: Impressions of the top bar. It is satisfactory and has everything she needs.</p>

Test Overview & Participants

District Administrator	2
School Leader	1
Middle School Teacher	1
Elementary Teachers	3
Total	7

Experience with Second Step: All participants are current active users

Program Experience:

Elementary Kit + Middle School Digital	3
Middle School Digital Only	1
Elementary Kit Only	3

Design Performance and Preference

Each participant had an opportunity to use both navigational designs, and we alternated which design was showed first. We evaluated task success and self-reported satisfaction.

Design	Tasks Success Rate*	Self-Reported Preference	Self-Reported Ease of Use (1-10)
Drawer	60% ----- 10/14 Tasks Correct** - Middle School 8/16 Tasks Correct - Elementary	2	9
Top	77% ----- - 11/14 Tasks Middle School 10/13 Tasks Elementary	3	9
No Preference		2	

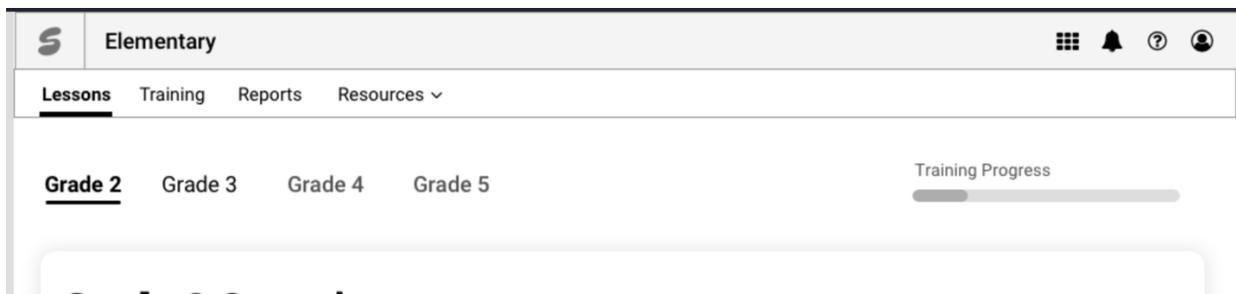
* We defined task success as, “used the navigation design to find the content”. Some participants did complete the task, but used other navigation means to do so.

**Not every scenario was tested for every user. This was due to customizing the test to fit the real-life scenarios of the users we spoke with.

Key Findings & Recommendations

1. Navigational Elements

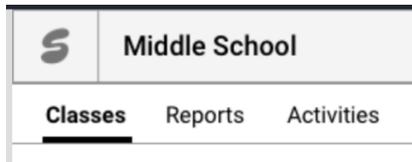
Program Navigation



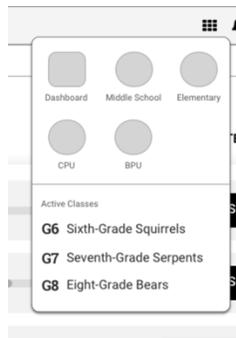
Participants found both designs to be satisfactory and felt like they could learn either. There was a higher task success rate on the top-bar design, and participants said that the top bar

design will be easier for all technical abilities to use. It was also clearer where they were in the program.

Global Navigation



Using the “S” Second Step logo was the way that most participants got home. They would go home to change programs or if they got stuck.



The “Grid” icon that had a global navigation was liked by those that discovered it, but it was not obvious what it was for most of the participants.

Dashboard

The word “dashboard” is a recognizable word and carries meaning for participants. They use dashboards for other EdTech products and expect “their personal things” to be present there.

Information Scant

Teachers and admins are looking for “their grade” and assume that all content should be in context of teaching the lesson. If they want to learn more, they will likely look for it from where they are in the lesson. Teachers scan the lesson content and are attracted by topics, themes, and words that can provide value. Participants like the “Unit Overview” and “Lesson Objectives” for this reason. If they get stuck, they will likely go to “Training”.

Recommendations for Navigational Elements:

- Use the top bar design for highest usability, lowest learnability, and increased contextual wayfinding clues.

- Treat the “grid” global navigation as a “nice to have” element but not critical for most users or use cases.
- The “S” was satisfactory for getting home, but consider active states, hover states or other clues to reinforce the concept of being “home”.
- Use words that explain information. Instead of using “Unit 1” as the label say the “Unit Name”. Make it clear what information kids will learn about and provide related suggestions on how to go deeper.
- **Do not expect users to find information outside of the “Teach” or “Train” context.**

2. Resources, Help and Training Mental Models

When teachers think of “resources” they think of content that they can **do** something with. A video, an assessment, a worksheet, handout, a presentation. If they want to learn *how something works*, such as “about the program” or “how to teach”, they think that it should be contextual in the lesson, in the training videos, or in a hardcopy teacher’s manual.

Sources:

Alicia 48:30, Danielle 20:15

Recommendation to segment Training-content and Resource-content:

Use “Training and Support” sections to explain how the program works and iteratively work towards a resource library of tools that can support teacher’s in finding “classroom doing” material, such as, worksheets, brain builders, and songs.

3. Teaching and Daily Habits

During the feedback sessions, we heard more about the day-in-the-life norms that elementary teachers, middle school teachers, and SEL leaders like to do. These teaching norms should be deeply considered when thinking of how our features support teacher’s contextually.

Teaching Digitally and Physically

Admins like to be able to quickly access a weekly or unit overview to share with teachers. Teachers want to print lesson scripts so they can teach from the online content, and not have a bulky card in their face. Teachers also prep and review a year’s worth of content and would like to be able to access printable materials based on lesson *and* everything in one place.

Sources: Kelli 18:00, 19:00, 19:50 | Danielle 27:00, 31:10 | Alicia 19:55, 32:15, 41:45, 47:35 | Curtis 28:30

Posters are referenced all the time in the classroom and should be present even when a teacher is predominantly teaching digitally.

Sources: Kelli - 23:40 | Curtis - 30:20

Prepping

Every participant we spoke with mentioned “prep” and “review lesson contents” as a must-do step. Middle School participants were looking for the “Prep” or “Review Lesson” as a prerequisite to teach the lesson. Elementary teachers said similar things and wanted an “at a glance” view of the weekly lesson.

“I want prep material and prep area of what I need to do.” - Elementary Teacher.

Sources: Heather 25:00 | Curtis 29:10 | Alicia 20:05 | Baionne 12:30 | Carolyn 29:10, 56:30 | Kelli 39:00 | Danielle 21:40, 41:30

“Teaching a Lesson” and SEL integration

Teachers expect that where “teaching a lesson” takes place will also be where to find all the content needed to that teach that skill or concept. Any related or supplementary strategies, brain builders, reinforcements, extensions, books, etc as should be connected contextually as part of the lesson or skill. Teachers **do** want to integrate SEL throughout the school day and every day, but it is asking a lot from them to find this content on their own.

Sources: Alicia 24:35, 30:15, Baionne 35:00, Kelli 20:00

Recommendations for supporting daily use habits:

- Keep classroom physical objects such as posters to help reference Second Step throughout the day.
- Make the contents of each lesson contextual and easy to print:
 - Weekly overview
 - Lesson Scripts
 - Student Handouts
- Show a “Lesson Preview” on each digital lesson.
- Make the lesson contents and themes for the whole year be scannable at a glance.
- Create a “download all” zip folder of grade printables.
- Do not make “extension” or “reinforcement” material to appear outside of “Teaching the Lesson” it should be part of the lesson. Create links or tooltips that explain what that content is, contextual to where it appears in the lesson.

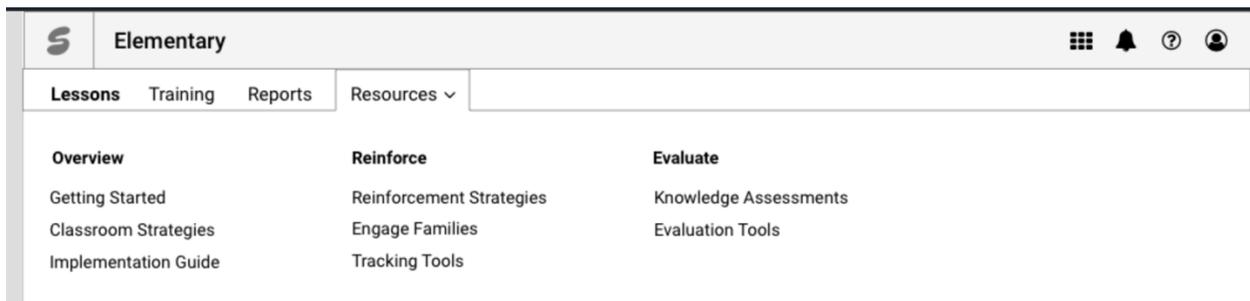
- Think of “Teach” as containing a variety of parts of the program. For example, it could be broken into, “Schoolwide” “My Class” “Year Long” “Unit” and “Lesson”. Different supportive program contents can fit into one of these parts to help increase fidelity and integration. This mental model supports a holistic implementation strategy and it thinks in layers and timelines, not in “content types”.

4. Elementary Kit Resources IA

When pulling open the program resources menu, there was feedback that it felt like a lot of helpful information but not really sure what is was. Some felt surprised the amount of content there.

“Why are resources so many and separate?” Alicia 48:00

Content categories made sense overall, but there was mixed feeling of how often the resources would really be utilized.



Helpful resource topics

- Getting Started: “This is for me, as someone new to the program”
- Lessons: “I am going to use this everyday” - Kelli, 28:00
- Engage Families: “We are constantly looking for things to engage our parents” Carolyn, 42:50

Interesting, but-not-sure, resource topics

- Classroom Strategies - “I would think this has to do with management or behavior?”
- “Tracking Tools and Knowledge Assessments seem interesting, it would be great if I could enter in the kids data digitally.” Alicia 32:20
- “Evaluate Tools and Assessments seem the same” – 41:40, Baionne

Not interesting resource topics

- Implementation Guide
- Reinforcement Strategies
- Evaluation Tools

Lesson and Program Pages

- “Reinforce sounds like an after-thought, if it is part of the lesson it becomes more integrated.” Baionne
- “What’s in a Kit” and “Research and Alignment” takes up a lot of space. 51:45 Danielle
- “I would love to see a panel for all the songs and all the brain builders.” 21:40 Danielle. “Wish I could see a menu of songs” 15:50 Kelli.
- “It’d be nice to see a day by day schedule for teaching the lesson” 34:20 Baionne

Recommendations for Elementary IA and templates:

- Change “Streaming Lesson Media” to “Lessons”
- Keep an easy way to switch between grades.
- Reduce weight in the program resources by integrating “reinforce content” into classroom strategies, pull out “Engage Families” and combine evaluation.
- Make the lesson page feel weekly and linear, from story to daily reinforcements.
- Create a grade navigation that houses relevant grade specific quick links
 - What’s in a Kit
 - Scope and Sequence
 - Song Library
 - Brain Builders Library
 - Download all grade handouts

5. Middle School

Participants enjoyed seeing some Middle School early concepts. The Unit snapshot of objectives with the video was very positively received. There was confusion on how they would prep for a lesson. Participants found the “Training and Support” page helpful as there was great attraction to the training videos and the quick links to book lists. They think it would help with teachers who didn’t get great support for teaching the program initially. Family Resources was also very well-received and participants wanted more family engagement material.

Advisory Activities

Middle School participants wanted to explore advisory activities by:

- “SEL Skill” (15:25 Curtis, 17:00 Curtis, 24:40 Alicia)
- Length
- Group Size
- Catchy Title
- Grade

Participants also mentioned that they want activities to be more integrated into the lesson curriculum with explanation of what the program themes are and how can they integrate that theme into other school day activities.

Recommendations for Middle School:

- Consider changing “Program Theme” to “SEL Skill”, because that is how the users understand it.
- Segment advisory activities by grade, length, and skill
- Add a “Preview Lesson” feature to the teach page
- Develop out a robust “Training and Support” section that has tools for teachers as well as admins. A “one-stop” place for anything related to teaching or implementing the program effectively.
- Integrate the book lists, lesson plans, and advisory activities into the unit or lesson.

Suggestions for Further Exploration

- Resource Library with Searching and Taxonomy
- Integrate Resource Content into Teach Journey
- Side Panel Navigation for moving between lessons, units, and full scope and sequence.
- Student assessments with tool to enter data in digitally
- Class roster with who was absent during a lesson

Study Limitations

The participants that were recruited did not fit the ideal scenario of a counselor using multiple programs in a school. This was alleviated by the fact that the admins that participated had teaching experience with multiple Second Step programs.

The tests were not conducted equally. They were customized based on that participant’s typical needs and common scenarios, so not each design had the same tasks asked to be performed. We relied on what was inferred by both the task success behaviors and the self-reported satisfaction.

The designer was also the moderator and note-taker of this study, this could bring about a bias and a limited perspective of all the possible highlights and findings.

Reference Documentation

Study Plan

Design 1 Prototype, Design 2 Prototype

Script – Teacher, Script – Counselor/Admin

Notes