Institute for the Study of Knowledge Management in Education (ISKME)
Task Order #0003 of ED-OSE-12-D-0013-0003

Deploying Initial Preference Setting in Two Domains:
Evaluating and Exploring Needs for Further Preference Setting

Deliverable 1.1 - Report on Site Selection and Participants

February 10, 2016

About This Report

This report is part of Task Order #0003 of ED-OSE-12-D-0013-0003, which focuses on the deployment and evaluation of initial and extensible preference setting tools in real-world OER and Older Citizens application settings. The report describes the process for selecting the deployment partners and lists the stakeholders that will participate in the deployment and evaluation efforts. The subsequent ICT report, Deliverable 1.2, describes the technology to be used in the deployment/evaluation studies, and plans for working with the stakeholder integrator and site team at each of deployment sites.

1. Selection of Deployment Partners

Using the Selection Criteria developed in the first months of this Task Order, the PGA team considered its existing relationships and conducted web searches on organizations, schools and entities within the OER and Older Citizens domains to identify an early list of 10 potential deployment partners, six in the OER setting and four in the Older Citizens setting. To examine each potential partner in accordance with the criteria developed, the PGA team created an Evaluation Matrix (a Google spreadsheet), which consisted of the selection criteria on the x axis of the matrix, and the list of the ten organizations on the y axis.

Initial information within the Evaluation Matrix was collected through prior knowledge of the organizations within the the PGA team, and through the review of available web-based information. We then sent emails directly to leaders at each organization to introduce the project, and to request a call to discuss the project further. Seven of the ten organizations responded to our email outreach with interest to explore the partnership further. One to two phone conversations were subsequently conducted with each of the seven interested organizations. The calls focused on a more detailed discussion of what the deployment partnership would entail, as well as a high level discussion of their ICT and AT infrastructure, and their end-user populations (to ensure a sufficient number and diversity of usability testing participants could be reached). The calls also focused on identifying specific sites for the deployment and testing, and the potential structure and roles of the on-site deployment team.

A final step of the selection process was to administer a short questionnaire to capture additional detailed information on the sites' existing ICT and AT infrastructure. Through this process, the PGA team narrowed in on four organizations that met the project's selection criteria. Table 1, below, outlines the organizations that were considered and selected through this process.

Table 1. List of Organizations Considered and Selected as Deployment Partners

Original list of 10 organizations considered and contacted	List of 7 organizations that responded with interest	List of 4 organizations selected that met the selection criteria
1. SeniorNet 2. OASIS 3. Senior Service America	1. SeniorNet 2. OASIS 3. Senior Service America	1. SeniorNet 2. OASIS 3. Colorado University

4. OATS 5. University of Colorado, Boulder 6. Colorado State University 7. SIATech High School 8. Coronado Unified School District 9. Career Path High School 10. Mountain Heights Academy	4. Colorado University 5. SIATech High School 6. Coronado Unified School District 7. Career Path High School	4. SIATech High School

After reviewing all site selection factors including diversity of potential end users and logistical challenges to the deployment and usability testing, the site selection team decided to exclude Career Path High and Coronado Unified School District in the OER setting, and Senior Service America in the Older Citizens setting.

2. Deployment Partners and Participants

Below is a brief overview of the four organizations selected as deployment partners:

1. **SeniorNet** – An educational nonprofit that provides computer and technology classes for adults aged 50 and over. Based in Fort Myers, Florida, SeniorNet has over 30 Learning Centers that offer technology training in the United States, as well as affiliations in several other countries.
2. **The OASIS Institute** – A national nonprofit organization based in St. Louis, Missouri that promotes healthy aging through lifelong learning, health programs, and a technology training program called *Connections*, designed to help adults 50 and over stay up to date with technology. OASIS offers its trainings and programs at its own centers across the country, as well as at community partner sites such as local libraries, independent living communities, and YMCAs.
3. **SIATech High School** -- A network of public charter high schools with campuses in Arkansas, California, and Florida that uses blended learning, and that is nationally recognized for its use of OER.
4. **University of Colorado, Boulder** – The Boulder campus has an established ICT Accessibility Initiative which operates an Accessibility Testing Lab for testing assistive technologies. UC Boulder incorporates OER into its programs and courses, and is the home of the well-regarded OER project PhET Interactive Simulations.

Through conversations with leaders at each organization, specific deployment sites were identified where the tool integration and usability testing will occur. These are outlined in Table 2, below.

Table 2. List of Deployment Sites

Deployment Site	**Site Overview**	**Overview of End-User Population**
SeniorNet: SeniorNet Learning Center, Huntington, NY	The Huntington Learning Center is the flagship center for SeniorNet, and offers classes on a	● Individuals with a range of accessibility needs, both physical and cognitive.

	range of technology topics from Windows, to social media, to mobile devices, to digital scrapbooking.	● Individuals with a range of experience in using technology. ● Primarily serves moderate-income individuals.
OASIS: Crown Center for Senior Living, St. Louis, MO (a community partner of OASIS)	Centrally located in St. Louis, Crown Center is an independent living community offering apartments for residents, and lifelong learning programs and services for both residents and surrounding area adults. Crown Center offers free wifi in its common area, and a computer room with two computers.	● Individuals with a range of accessibility needs, both physical and cognitive. ● Primarily individuals with limited technology experience (many residents do not have computer devices; some residents use the wifi and their own devices in the common area, and others use their private wifi accounts and devices in their apartments). ● Primarily moderate-income individuals
UC Boulder: Accessibility Lab, Boulder, CO	UC Boulder's Accessibility Lab employs students to test assistive technologies and help to create documentation describing accessibility features available on a wide range of campus technologies.	● In the Accessibility Lab, primarily students with low vision; however, through the Disability Services Office, the campus serves students with diverse needs and accessibility challenges. ● Students that are moderately to highly skilled in using technology, and most have their own devices, many with AT installed.
SIATech: Learning Lab, Los Angeles, CA Campus	SIATech uses blended learning models within all programs, with some variation in the level of face-to-face and virtual activities. The majority of learning experiences incorporate digital materials in some way. SIATech's LA campus operates a Learning Lab where students come to complete assignments and projects.	● The majority of students with IEPs are characterized as needing accommodations for cognitive skills barriers; a small number of students require accommodations for vision, hearing, or motor skills barriers. ● Students that are moderately to highly skilled in using technology. Some accessibility students are issued laptops by the school, but the bulk of them do work in the classroom lab. ● Students aged 16-24; average age is 19.

Table 3, below, details the deployment team that will support the integration and usability testing at each site.

Table 3. Stakeholder Deployment Team

Organization	Organization Lead *Head decision maker for the*	Project Manager	Integrator	Recruitment Lead *Identifies and recruits testing*

	deployment partnership	*Project manager for the deployment work*	*Responsible for FD Tool integration at the deployment site*	*participants at deployment site*
SeniorNet	Leslie Smith, CEO, SeniorNet	Leslie Smith	Pat McAsey, Learning Center Coordinator, Huntington, NY	Pat McAsey
OASIS	Marcia Kerz, ED, Oasis	Amy VanDeVelde, National Connections Program Manager, Oasis	Florence Schachter Director Of Residence and Community Services, Crown Senior Center	Florence Schachter, Crown Senior Center
UC Boulder	Dan Jones, Chief Digital Accessibility Officer, UC Boulder	Pramila Patel, ICT Accessibility Program Manager, UC Boulder	Pramila Patel	Pramila Patel, working with the Disability Services Office at UC Boulder
SIATech HS	David Meyer, ED, SIATech	Nicole Taylor, Director of Special Education and Student Services, SIATech	Nicole Taylor	Nicole Taylor

3. Next Steps

The ICT Report (Deliverable 1.2), which accompanies this report, describes the technology to be used in the deployment/evaluation studies, and plans for working with the stakeholder integrator and site team at SeniorNet, OASIS (Crown Senior Center), UC Boulder, and SIATech. Immediate next steps for the PGA project include completing the First Discovery Tool final development sprint, finalizing the usability testing plan, and working with site leads to recruit participants for the usability testing.