

Detailed Design for Montreal Education Satisfaction Performance Improvement Program

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Detailed Design Summary

The following will detail two proposed interventions that are part of the Montreal Educational Option Satisfaction Performance Improvement Campaign (PIC).

Sponsor and Overview:

The PIC is a collaboration between municipal government of Montréal, *La Ville de Montréal* and the Quebec provincial government, *Le Ministère de l'éducation* in using education as way to increase quality of life and attractiveness of living in Montreal and improve parents' experience in selecting and enrolling their children so as to reduce the administrative costs associated with dissatisfaction and information not being properly disseminated.

Although I consulted much literature to inform my thinking, there are few parts that I can reasonably provide a specific reference as I was working on a solution that doesn't seem to exist currently that is an amalgamation of several banal tools that I didn't feel I needed to ratify through references like filtered search tools or a registration form. Some references are just pop culture websites for observing filtered search engines, without necessarily reproducing those search engines like duproprio.com or <https://ecolespriveesquebec.ca> .

Intervention Number One

Intervention Number 1	
Sponsor	<i>La Ville de Montréal and Le Ministère de l'éducation</i>
Users	Parents of children being educated in Montreal
Description of the Intervention	<ul style="list-style-type: none"> • This is a part of a one-stop portal where parents can accomplish most of their research and registration for different education options in Montreal. • This particular intervention focuses on the section where parents can search for educational options based on geography teamed with other filters. • They can then click on a result on a map and it would give them information on that institution in a consistent way or list them in a grid format with all other institutions, so they can compare along the same criterion. • They can order the results in a list in terms of preference.
Objectives Addressed	<ul style="list-style-type: none"> • Indexing schools amongst consistent characteristics using a central resource. • Creating a hierarchal shortlist in terms of preference.
Form or Genre	Online Portal with a search engine with filters to generate mapped and listed results of educational options that correspond to search parameters
Communication Medium	To make this intervention more accessible there would be a digital online version and/or in-person or videoconference meeting with an “Education Support Person” who can help to use the portal or input the information and get the results printed as a hard copy. . This Detailed Design will focus on the Online Version
Estimated Time to Complete the Intervention	12 months

Background of the Intervention:

This intervention was chosen because of the problems clearly caused by a lack of a central resource. This meant that searching for schools in one's area or according to preference meant sifting through multiple websites (Google, School Boards, REPAQ, Fédération des Établissements d'enseignement privées, Ministère de l'éducation, parent social media groups) unless parents had prior knowledge or decided to go with the most obvious or convenient option. The goal of this is that they can do a search and have a complete listing of available options, including homeschooling and be able to compare those options and even place them in order of preference. This could greatly simplify the research process so that parents do not simply give-up. An in-person option would also be available to overcome barriers of language, literacy, technological access and know-how and impersonality. Although there are many portals that exist to manage a student's details, information and registry for different services within one institution, there does not seem to be a central way to register for their respective institutions for schools although there is an attempt at this for daycare on the Place 0-5.

Design of the Intervention:

The design of this part of the portal is meant to make using it very easy to use. It is straightforward and includes a chat section to get support as well as a way to book an appointment if people decide to do it with a real person. It is meant to show parents what is available to them as options and in a in a very straightforward way how they can compare each option. By design, it is also meant to help push parents towards getting clear about their preference and will show them how to place the educational options available in preferential order.

Material to be Developed:

Pre-intervention:

Log-in software and account creation

Form input information and documents that will later be auto-filled into registration

Backend for schools to input their information and be able to manage sign-ups and registration through the system on their end

Main page with all menu options

Chat/support box with video tutorials or help using the system and a system of people and bots to respond

Support for schools in inputting information

Structure (front end for parents and back-end for portal managers, data input people, programmers, schools, government, the support branch)

Interface between all sides of the portal

Esthetics- Graphic Arts Team government templates to be determined with both governing bodies and the graphic arts team

Security- a team is needed to guarantee and continually update security as families will be inputting sensitive information and login security, virus, hacker

Search engine with advanced filters that produces the appropriate educational options

For Intervention 1

A. Mapping software- a mapping software that maps the family's home and resulting educational options based on the filters

- B. Characteristics and filters for each school to be inputted
- C. A visually efficient way of comparing the resulting characteristics between schools
- D. Software or a widget to reorder the list in terms of preference
- E. Function to search and add an educational option to the list outside of the search results
- F. Function to remove an educational option from the list
- G. Buttons to book an open house or info session for each education option
- H. Fine print and government logos on the bottom
- I. Open House/Information Night registration button
- J. Registration button for each education option
- K. A wizard that tells parents if they cannot apply for a certain school with a board based on their other applications, or their zone or whether they need an inter-board agreement or an English eligibility certificate
- L. Confirmation of registration messages
- M. Messages to warn parents when a registration deadline is coming up for a school in their list
- N. Message system to notify
- O. Function to see the status of applications in one's list that were applied for
- P. Function to cancel registration or attendance to schools

Resources Needed:

Human:

- Programming team
- Security team

- Front end team and graphics
- Back-end team for school
- Front end Support team
- Back-end support team
- Information collection team
- Support for schools
- Information input team
- Legal team to verify that the portal is conforming to laws pertaining to obtaining information, information about minors and any necessary disclaimers are used in the fine print
- Testing team and tweaking team
- Budget Team
- Management team (on-time, on budget, staff, hiring, communication)

Non-Human Resources

Content/Data for mapping, characteristics and search filters and for the registration process from each school

Data storage

Security System

I will focus on the detailed design of the three highlighted screens below:

Home page with “Find Schools” highlighted and all of the other elements

Search page with filters

Map results

List results with a grid that compares schools according to compared characteristics

Order hierarchal

Search and manually add another option

Storyboards

Date: April 8th, 2021	Version: 1	Project Title: Montreal Educational Selection and Enrollement PIC	Slide Title: Portal Main Page	Intervention 1	Slide number 1 of 6
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MENU with different portal options. "Find Schools" highlighted

FR

PORTAL HOMEPAGE

Word of Welcome and mention and prompts from portal wizard

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Government logos and fine print

**Help:
Chat
Support and links to video tutorials**

Storyboard Notes:

Programming Notes: All of the boxes in the menu will link to different pages in the portal. There will be a wizard slide show that begins with a word of welcome then goes on to show what each menu tab is for one by one. There is a chat/support function in the bottom left.

Graphics Team Notes: The font and colours must match the guidelines provided by the Ministère de l'Éducation and La Ville de Montréal together. Their logos will be at the bottom of each page

Date: April 8th, 2021	Version: 1	Project Title: Montreal Educational Selection and Enrollement PIC	"Find Schools Page"	Intervention 1	Slide number 2 of 6	FR
MENU with different portal options. "Find Schools" highlighted						

"Find Schools" Page

Search Filter boxes and search button

Government logos and fine print

**Help:
Chat
Support and
links to video
tutorials**

Storyboard Notes:

I consulted, amongst many: duproprio.com or <https://ecolespriveesquebec.ca>

Programming Notes: All of the boxes in the menu will link to different pages in the portal. Some search filter boxes have a drop-down pop-up menu and others checkboxes where they can choose multiple options. There also needs to be a search button.

Date: April 8th, 2021	Version: 1	Project Title: Montreal Educational Selection and Enrollement PIC	Slide “My Schools” search results page	Intervention 1	Slide number 3 of 6
MENU with different portal options. “My Schools” highlighted					



“My Schools” Page

Grid list of resulting schools from the filtered search plus a button to manually search and add other options, delete function to eliminate options, and a function to move schools up and down in ranking within the list



Government logos and fine print

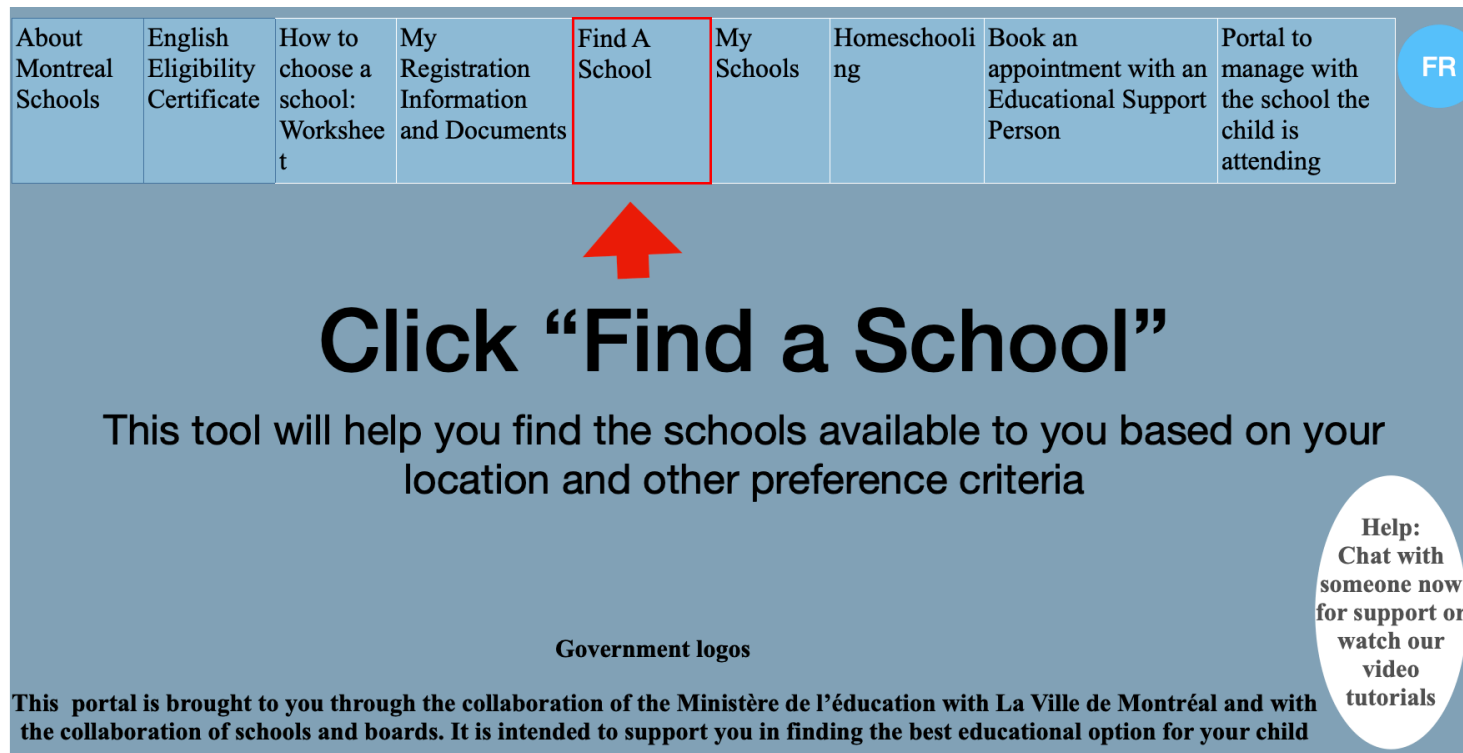
Graphics Team Notes: The font and colours must match the guidelines provided by the Ministère de l'Éducation and La Ville de Montréal together. Their logos will be at the bottom of each page

Storyboard Notes:

Programming Notes: All of the boxes in the menu will link to different pages in the portal. Explanation box from Wizard about each search filter box.

Graphics Team Notes: The font and colours must match the guidelines provided by the Ministère de l'Éducation and La Ville de Montréal together. Their logos will be at the bottom of each page. This is like a stylized spreadsheet with the results. Please make it easy to compare schools in the grid visually.

Prototypes



Find Schools that match your needs with our school suggestion tool. You may also add another school manually in the results page “My Schools”

Your Address	Maximum Distance of School	Level of Schooling (Drop-Down Menu)	Language (Drop-Down Menu)	Type of School (Drop-Down Menu)	Requirements (Checkboxes)		Interests (Checkboxes)	
Make sure to check the postal code when using Quick Search	km's	All	All	All	All	<input type="checkbox"/>	All	<input type="checkbox"/>
		All	French	Traditional public school	Bus service	<input type="checkbox"/>	Sports	<input type="checkbox"/>
		Primary School	Bilingual	Public Alternative	Daycare Service	<input type="checkbox"/>	Music	<input type="checkbox"/>
		Pre-Kindergarten 4 yrs	French Immersion	International Baccalaureate	Breakfast	<input type="checkbox"/>	Theatre	<input type="checkbox"/>
		Kindergarten 5 yrs	English Core	Private	Special Needs Program	<input type="checkbox"/>	Art	<input type="checkbox"/>
				Religious			Science	<input type="checkbox"/>
				Montessori			Math	<input type="checkbox"/>
							Languages	<input type="checkbox"/>
							Technology	<input type="checkbox"/>
							Environment/Nature	<input type="checkbox"/>
							Community	<input type="checkbox"/>
							Project Based	<input type="checkbox"/>
							Field Trips	<input type="checkbox"/>

This is intended to be a list of schools that may be the best choices for you based on your search criteria. Drag school names in Column A to put them in preferential order. You may manually search and add a school last row

School	Level of Schooling	Distance from Home	Bus Service available	Daycare Service y/n and cost	Special Needs Support	Breakfast Included	School Focuses	Academic Approach	After School Programs	Parent Involvement	Ratings (Secondary Schools Only)	Open House Registration	Registration (after Open House when applicable)	Remove This School From List
F.A.C.E. (EN)	Primary School	7 km	No	\$8.25/day	No	No	Art and music	Project Based, rigorous	No	Possible	n/a	Open House Registration	Register <input type="checkbox"/>	<input type="checkbox"/>
Riverview	Primary School	1 km	Yes	\$8.25/day	Yes	No	STEM	Traditional	Yes for kids and families	Possible	n/a	Open House Registration	Register <input type="checkbox"/>	<input type="checkbox"/>
Notre-Dame-de-Lourdes	Primary School	0.3km	No	\$8.25/day	Strong	Yes	None	Traditional	No	Possible	n/a	Open House Registration	Register <input type="checkbox"/>	<input type="checkbox"/>
Roslyn	Primary School	6 km	Yes, but not for your zone	\$8.25/day	Limited	No	Technology, music	Traditional	Limited	Yes	n/a	Open House Registration	Register <input type="checkbox"/>	<input type="checkbox"/>
Saules Rieurs	Primary School	0.4km	Yes	\$8.25/day, many excursions	Limited	No	Environment	Freinet	Yes, sports and family activities	Obligatory	n/a	Open House Registration	Register <input type="checkbox"/>	<input type="checkbox"/>
Add another School	Primary School												Register <input type="checkbox"/>	<input type="checkbox"/>

Intervention Number Two

Intervention Number 2	
Sponsor	<i>La Ville de Montréal</i> and <i>Le Ministère de l'éducation</i>
Users	Parents of children being educated in Montreal
Description of the Intervention	<ul style="list-style-type: none"> • This is a part of a one-stop portal where parents can accomplish most of their research and registration for different education options in Montreal. • This particular intervention focuses on the section where parents can register or apply to the the desired schools that they are eligible for with their information being autofilled except specific information or documents that schools may request additionally
Objectives Addressed	<ul style="list-style-type: none"> • Registering their child at one place by selecting the options they wish to apply for
Form or Genre	Online Portal with a feature where parents can register or apply for admission to several schools or education options as well as cancel registration
Communication Medium	To make this intervention more accessible there would be a digital online version and/or in-person or videoconference with an “Education Support Person” who can help to use the portal or with registration This Detailed Design will focus on the Online Version

Estimated Time to Complete the Intervention	12 months
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Background of the Intervention:

This intervention was chosen because currently parents go through the registration process often with several schools through many different intermediary bodies. It is redundant and could be streamlined instead of engaging with multiple boards and schools. Parents would not have to secretly register their child with several bodies that do not communicate but could easily register for those that are possible to register for without having to try to navigate what they can and cannot register for. This tool would be able to guide them through it and let them know what they can and can not register for as they do it..

Design of the Intervention:

The design of this part of the portal is meant to make using it very easy and simple in order to save time and simplify the process. It would mean clicking a register button for each desired education option with a wizard telling a parent if this works or not or if other schools will not be eligible upon applying to this school as well as if it requires an inter-board agreement or an English Eligibility certificate that they don't have yet. The parent will be prompted to verify the autofill responses in a form and add any additional required information or documents specific to each school. They will receive confirmation of application and be able to follow the status of each application as well as cancel all of the admissions they will not accept by pressing a button instead of having to contact each school or board.

Material to be Developed:

Pre-intervention:

Log-in software and account creation

Form to input information and documents that will later be auto-filled into registration

Backend for schools to input their information and be able to manage sign-ups and registration through the system on their end

Main page with all menu options

Chat/support box with video tutorials or help using the system and a system of people and bots to respond

Support for schools in inputting information

Structure (front end for parents and back-end for portal managers, data input people, programmers, schools, government, the support branch)

Interface between all sides of the portal

Esthetics- Graphic Arts Team government templates to be determined with both governing bodies and the graphic arts team

Security- a team is needed to guarantee and continually update security as families will be inputting sensitive information and login security, virus, hacker

Search engine with advanced filters that produces the appropriate educational options

For Intervention 2:

A. Registration button for each education option

- B. A wizard that tells parents if they cannot apply to a certain school with a board based on their other applications, or their zone or whether they need an inter-board agreement or an English eligibility certificate
- C. Registration form with auto-fill and additional questions particular to each institution
- D. Confirmation of registration messages
- E. Messages to warn parents when a registration deadline is coming up for a school in their list
- F. Message system to notify of the results
- G. Function to see the status of applications in one's list that were applied for
- H. Function to cancel admission for the schools that the child won't attend

Resources Needed:

Human:

- Programming team
- Security team
- Front end team and graphics
- Back-end team for school
- Front end Support team
- Back-end support team
- Information collection team
- Support for schools
- Information input team

- Legal team to verify that the portal is conforming to laws pertaining to obtaining information, information about minors and any necessary disclaimers are used in the fine print
- Testing team and tweaking team
- Budget Team
- Management team (on-time, on budget, staff, hiring, communication)

Non-Human Resources

Content/Data for the registration process from each school

Data storage

Security System

I will focus on the detailed design of the three highlighted screens below:

List with “Register” button highlighted

Form with autofill done and examples of additional questions

Confirmation of registration

Update or messages

View the of applications

Cancel Registration

Storyboards:

Date: April 8th, 2021	Version: 1	Project Title: Montreal Educational Selection and Enrollement PIC	Slide Register Button Highlighted	Intervention 2	Slide number 4 of 6	FR
MENU with different portal options.						

“My Schools” Page with “Register” button highlighted

Grid list of resulting schools from the filtered search. There will be a “register” button(s) highlighted for one of the schools as an example

Help:
Chat
Support and links to video tutorials

Government logos and fine print

Storyboard Notes:

Programming Notes: The Open House Buttons link to a registration page for the open house or a video in the case of some schools. The “Register” button links to the registration form for the school.

Graphics Team Notes: The font and colours must match the guidelines provided by the Ministère de l'Éducation and La Ville de Montréal together. Their logos will be at the bottom of each page. This is like a stylized spreadsheet with the results. Please make the “Register and “Open House’ Buttons clearly action buttons.

Date: April 8th, 2021	Version: 1	Project Title: Montreal Educational Selection and Enrollement PIC	Slide School registration form with autofill already completed	Intervention 2	Slide number 5 of 6
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MENU with different portal options.

Registration form with autofill

Parents can verify the information that is already input in the form, answer any additional questions or submit and additional documents that weren't requested with the set-up of the account

**Help:
Chat
Support and
links to video
tutorials**

Government logos and fine print

Storyboard Notes:

Programming Notes: The forms are pdf's that can be filled-in with autofill of the information already obtained from parents. There has to be a spot to load missing documents not already requested and a "submit" button. There also needs to be a way to get parents to give an electronic signature when they input their info and have them be consent to uploading it at the end of the form. The completed forms and documents need to go to the appropriate board or school.

Graphics Team Notes: The look is very basic with black and white fillable PDF particular to a school board and will display their logo.

Date: April 8th, 2021	Version: 1	Project Title: Montreal Educational Selection and Enrollement PIC	Slide Application Complete Confirmation Page	Intervention 2	Slide number 6 of 6
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MENU with different portal options.

Confirmation Page

This page confirms that registration forms are complete and have been received and let's parents know that the school in question will be in touch by email

Government logos and fine print

FR

**Help:
Chat
Support and
links to video
tutorials**

Programming Notes: There has to be an email notification and the form itself sent to the school or board concerned plus a confirmation email to the parent.

Graphics Team Notes: Barebones and functional in style. Neutral in branding as this is a message that bridges the sponsor and other institutions.

Prototypes







About Montreal Schools	English Eligibility Certificate	How to choose a school: Worksheet	My Registration Information and Documents	Find A School	My Schools	Homeschooling	Book an appointment with an Educational Support Person	Portal to manage with the school the child is attending	
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Table 1

School	Distance from Home	Bus Service available	Daycare Service y/n and cost	Special Needs Support	Breakfast Included	School Focuses	Academic Approach	After School Programs	Parent Involvement	Ratings (Secondary Schools Only)	Open House Registration	Registration (after Open House when applicable)
F.A.C.E. (EN)	7 km	No	\$8.25/day	No	No	Art and music	Project Based, rigorous	No	Possible	n/a	Open House Registration	Register 
Riverview	1 km	Yes	\$8.25/day	Yes	No	STEM	Traditional	Yes for kids and families	Possible	n/a	Open House Registration	Register 
Notre-Dame-de-Lourdes	0.3km	No	\$8.25/day	Strong	Yes	None	Traditional	No	Possible	n/a	Open House Registration	Register 
Roslyn	6 km	Yes, but not for your zone	\$8.25/day	Limited	No	Technology, music	Traditional	Limited	Yes	n/a	Open House Registration	Register 
Saules Riours	0.4km	Yes	\$8.25/day, many excursions	Limited	No	Environment	Freinet	Yes, sports and family activities	Obligatory	n/a	Open House Registration	Register 


Government logos

This portal is brought to you through the collaboration of the Ministère de l'éducation with La Ville de Montréal and with the collaboration of schools and boards. It is intended to support you in finding the best educational option for your child

Help:
Chat with someone now for support or watch our video tutorials

*This prototype is based on EMSB's real registration form. (English Montreal School Board, 2020)

(The sections the autofill could not input are highlighted)

		Commission scolaire English-Montréal English Montreal School Board	
SCHOOL YEAR: School: 2021-2022			
Start Date: August 2021			
School: F.A.C.E. Elementary School (En)			
Student Identification Fiche No.			
Family Name(s): Chabot		Given Name(s): Vincenzo	
Middle Names: Herbie			
Date of Birth: 2016/07/20		X M F	
Year / Month / Day		Gender Quebec	
		CHAV820416 03	
		Permanent Code	
Birth Place: Montreal			
Country City Province Canada, Quebec			
Medicare No: CHAV16042014		Expiry Date: 2024/07	
Parent 1 - Information Relationship to Student: Father or Mother X			
Family Name(s): Chabot		Given Name(s): Anne	
Place of Birth (Mandatory): B.C.		Date of Birth (YY/MM/DD): 82/07/20	
		Deceased	
Social Ins No: 733 277 730		Education: A B C D E F G H I	

Cell No: 438-931-0140	E-Mail Address: anne@dhyf.com
Parent 2 - Information Relationship to Student: Father or Mother	
Family Name(s): Chabot	Given Name(s): Marc
Place of Birth (Mandatory): Montreal	Date of Birth 81/02/19 (YY/MM/DD): Deceased
Social Ins No:	Education: A B C D E F G H I
Cell No:	E-Mail Address:
A: Elementary Studies or Less B: Secondary School or Equivalent without Diploma C: Secondary School Diploma or Equivalent D: Uncompleted College Studies E: Pre-University Programs, BA in French or Equivalent F: Diploma if College Studies (Technical Programs) or Equivalent G: University Studies - not completed H: University Diploma I: Other	
Legal Guardian - Information Gender: Male or Female	
Family Name(s):	Given Name(s):
Place of Birth (Mandatory):	Date of Birth (YY/MM/DD):
Social Ins No:	Education: A B C D E F G H I
Cell No: (438)839-3993	E-Mail Address: marc@videorama.ca
A: Elementary Studies or Less B: Secondary School or Equivalent without Diploma C: Secondary School Diploma or Equivalent D: Uncompleted College Studies E: Pre-University Programs, BA in French or Equivalent F: Diploma if College Studies (Technical Programs) or Equivalent G: University Studies - not completed H: University Diploma I: Other	
Person Legally Responsible	
3	
1: Both Parents 2: Father 3: Mother 4: Guardian Joint Custody	
Student Information:	
Mother Tongue: French	Language spoken at home: French and English

Level: Grade: Homeroom:	
Address	1: Both Parents 2: Father 3: Mother 4: Guardian 3
348 Argyle St, Westmount, Qc, H4H 1T7	
Civic No Direction Street Type Street Apartment	
City P.O. Box Province Postal Code	
() - ext. () - ext. () - ext.	
Home Phone No: (Parent 1) Work No: (Parent 2) Work No:	
Address 2 (Joint Custody Only)	2: Father 3: Mother
Civic No Direction Street Type Street Apartment	
City P.O. Box Province Postal Code	
() - ext. () - ext. () - ext.	
Home Phone No: (Father) Work No: (Mother) Work No:	

What activities and hobbies does your child enjoy doing on a regular basis?

What artistic activities do they like most?

Why do you want your child to study at FACE? What motivated your decision?

Does your child play a musical instrument? YES NO

If yes, which one? _____ **Since when?** _____

If no, has your child ever shown an interest in playing an instrument? YES NO

If so, which one? _____

F.A.C.E. Requires some additional documents beyond what we have in your file. If you need to look for them, your application will auto-save when you leave it and you can pick-up where you left off next time. Please upload the following:

- Completed authorization to film or to photograph document (click here to download)
- Two documents showing proof of

Quebec residency – List of acceptable original documents showing your full name and address in Quebec:

1. Record of employment.
2. Quebec driver's license.
3. Municipal or school tax notice.
4. Deed of purchase of residential property showing the owner's name.
5. Invoice from a utility company (e.g., electricity) or residential phone or cable service provider.
6. Proof of home or tenant insurance.

7. Proof of membership in a Quebec professional association.
8. Quebec bank account statement or a credit card statement.
9. Tax assessment from Revenue Quebec.
10. Notice of child assistance payment from the Régie des rentes du Québec.

One proof of identity – List of acceptable original documents:

1. Birth certificate issued by the Civil Registrar (long-form certificate stating the parents' full names).
2. Birth certificate (stating the parents' full names).
3. Birth certificate or national identification card if born outside Quebec.
4. Citizenship certificate/card.
5. Certificate of name change (issued by the Quebec Ministry of Justice).
6. Visa or Canadian immigration record or permanent resident card (issued by Citizenship and Immigration Canada).
7. Temporary resident permit (issued by Citizenship and Immigration Canada).
8. Certificate of Acceptance or Quebec Selection Certificate (issued by the Ministère de l'Immigration, de la Diversité et de l'inclusion).
9. Adoption judgment (issued by the Youth Court).
10. Recognition of an adoption judgment (issued by the Youth Court).
11. Refugee Protection Claimant document.
12. Interim Federal Health Program Certificate of Eligibility.
13. Order of placement (if the place and date of birth do not appear on the document, you must submit a supporting document that shows this information).
14. Certificate of Indian Status.
15. Letter attesting to the student's identity, signed by the director of a Child and Youth Protection Centre (for students living in a youth centre).

File Upload

I hereby authorize the teaching institution to process the personal information on this form for the management of my child's educational services. If my child changes school I authorize the teaching institution to transfer this personal information if required, to the new teaching institution.

 (This requires the parent agree to sign electronically)

Signature of Parent or Guardian

Date: Year / Month/ Day

About Montreal Schools	English Eligibility Certificate	How to choose a school: Worksheet	My Registration Information and Documents	Find A School	My Schools	Homeschooling	Book an appointment with an Educational Support Person	Portal to manage with the school the child is attending
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Your request for admission to F.A.C.E. Elementary School’s EMSB Bilingual program has been received and is complete. F.A.C.E. will be in contact you shortly. You will also receive confirmation of your application via e-mail.

Government logos

This portal is brought to you through the collaboration of the Ministère de l’éducation with La Ville de Montréal and with the collaboration of schools and boards. It is intended to support you in finding the best educational option for your child

**Help:
Chat with someone now for support or watch our video tutorials**

Formative Evaluation Plan

The purpose of this plan is to validate, improve and correct any glitches in the Performance Improvement Campaign and focuses on the previous two interventions: **1)** Searching for schools with a filtered search through a central portal **2)** Registering for multiple schools on a central portal using auto-fill so that parents do not need to repeatedly input the same information.

This plan includes four reviews: (1) a technical review, (2) an editorial review, and (3) a pilot test and a (4) production review. The corresponding details of each review, including purpose, procedure, timeline and process are provided below.

Formative Evaluation for Intervention 1

Review 1: Technical Review for Intervention 1

Theory from (Carliner, 2015) and template (Fletcher, 2018).

Purpose of the evaluation	The purpose of this review is to make sure that the information is accurate and complete and the search criteria is complete, accurate and the most appropriate.
When it will occur	At the end of the first and second draft.
Who will participate in the evaluation and the expertise they bring	There will be eight subject matter experts reviewing it, a representative of the English Montreal School Board, a representative of the CSSMB, a representative of the CSDM, a representative of the Lester B. Pearson School Board, a representative of the <i>Ministère de l'éducation</i> , as well as a member of the <i>Fédération des établissements d'enseignement privé</i> and two parents that work in education but have also spent extensive energy navigating researching and finding schools and information about them. These people have insight into what is most essential in terms of filters and presenting each school's information in an accurate way that is easy to compare.

Guidelines	Look for inaccuracies in the information, where search parameters are incomplete or results vague, misleading or hard to compare.
Procedure for conducting reviews	<ol style="list-style-type: none"> 1. By email, send a cover letter with instructions and guidance to the reviewer. Included are: <ol style="list-style-type: none"> a. The storyboards b. The prototypes c. The input in the search tool d. The results for five schools 2. Obtain feedback from the reviewers. 3. Classify the comments into these categories: <ol style="list-style-type: none"> a. Showstopper: fix immediately b. Must do: fix before publishing c. Nice to do: fix if there is time and budget permits 4. Hold a virtual review meeting with the reviewers to clarify any comments, if necessary. 5. Prepare an action plan to address the comments and make corrections. 6. Repeat the process for second draft.
Documents to be drafted: See appendix.	<ul style="list-style-type: none"> ▪ Cover letter ▪ Reminder ▪ Thank you note ▪ Invitation to review meeting

<p>Plan to integrate feedback from the evaluation See Appendix</p>	<p>Initial sample of action plan: Comment/Priority (A,B,C)/Person Responsible/Date to be changed</p>
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Review 2: Pilot Test for Intervention 1

Theory from (Carliner, 2015) and template (Fletcher, 2018).

<p>Purpose of the evaluation</p>	<p>The purpose of this test run is to identify potential flaws in the program in its use by the performers. It will also test the wizard that guides parents through the program. The people testing it will be parents.</p>
<p>When the evaluation will occur</p>	<p>After the technical review and before the copyediting review.</p>
<p>Who will participate in the evaluation and their expertise</p>	<p>We will recruit 4 X 5= 20 parents, who will each receive a compensation of \$300. These people are able to give feedback from the point of view of someone using it without knowing anything about it.</p>

<p>Procedure for conducting test?</p> <p>Drafts of materials needed for reviewers to conduct reviews?</p>	<ol style="list-style-type: none"> 1. Schedule the pilot runs at a different time for each one, so that they may be observed and interacted with as they do it on zoom (URL, date and time of the meeting) 2. Recruit pilot learners with the characteristics previously mentioned. 3. Offer the program. <ol style="list-style-type: none"> a. Observe or interact with them as they do it. b. Have pilot learners complete level 1 evaluation and level 2 evaluation. 4. Prepare an action plan to address feedback. (If appropriate)
<p>Guidelines of the pilot test</p>	<p>We will be looking for where parents seem to not understand or have difficulty and try and figure-out why or if something isn't working well or is unclear. The Level 1 and Level 2 evaluations must also gauge reaction and learning and what can be improved based on the results.</p>
<p>Documents to be drafted.</p> <p>See appendix.</p>	<ul style="list-style-type: none"> ▪ Invitation to participate ▪ Reminder of the pilot run ▪ Thank you note ▪ Invitation to review meeting
<p>Plan to integrate feedback from the evaluation</p> <p>See appendix.</p>	<p>Initial sample of the action plan: Comment/Priority (A,B,C)/Person Responsible/Date to be changed</p>

Review 3: Editorial and Branding/Visual for Intervention 1

Theory from (Carliner, 2015) and template (Fletcher, 2018).

Purpose of the evaluation	<p>The purpose of the editorial review is to:</p> <ol style="list-style-type: none"> 1) Identify any issues in the organization and clarity of the materials 2) Fix issues in the content related to grammar, spelling, and punctuation 3) Ensure compliance to the design template and combined branding guidelines of <i>Le Ministère de l'Éducation and La Ville de Montréal</i>.
When it will occur	<p>Developmental review: At the end of the first draft.</p> <p>Copyediting editorial and branding review: At the end of the final draft.</p>
Who will participate in the evaluation and expertise they bring	<p>(Name) is an experienced editor editor.</p> <p>(Name) is an Human Performance Technologist and Performance Improvement expert.</p> <p>(Name) is the head of the graphics team and the creator of the project's graphic design guidelines. She is an expert in their aesthetics.</p>

Guidelines	<p>The editor will be looking for grammatical errors. She will also look for formatting inconsistencies, use of fonts, bold, italics, etc.</p> <p>The Human Performance Technologist will verify the structure and clarity of the material as well as where ideas may be broken into smaller pieces or presented more concisely or more completely as well as the organization of the information and images on the screens.</p> <p>The director of the graphics team will verify the consistency in the branding and company template as well as formatting inconsistencies and the esthetics.</p>
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Procedure for conducting reviews	<p>Copyediting, instructional and branding/esthetics review:</p> <ol style="list-style-type: none">1. By email, send a cover letter with instructions and guidelines to the reviewer. Attach the following materials:<ol style="list-style-type: none">a. The storyboardsb. The prototypes2. Receive comments from reviewer.3. Classify the comments based on the following scale:<ol style="list-style-type: none">a. Showstopper: fix immediatelyb. Must do: fix before publishingc. Nice to do: fix is time and budget permit4. Hold a virtual review meeting with the reviewer to resolve any unclear comments, if required.5. Do the necessary and feasible corrections. <p>Branding template review:</p> <ol style="list-style-type: none">1. By email, send a cover letter with instructions and guidelines to the reviewer. Attach the following materials:<ol style="list-style-type: none">d. The storyboardse. The prototypes2. Receive comments from reviewer.3. Classify the comments based on the following scale:<ol style="list-style-type: none">a. Showstopper: fix immediatelyb. Must do: fix before publishingc. Nice to do: fix is time and
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Documents to be drafted for the copyeditor, instructional designer and branding/marketing expert See appendix.	<ul style="list-style-type: none"> ▪ Cover letter ▪ Reminder ▪ Thank you note
Plan to integrate feedback from the evaluation See appendix	Initial sample of action plan: Comment/Priority (A,B,C)/Person Responsible/Date to be changed

Review 4: Production Review for Intervention 1

Theory from (Carliner, 2015) and template (Fletcher, 2018).

Purpose of the evaluation	The purpose of this is to make sure that there aren't technical glitches when it is opened on different devices and browsers and that all of the downloading, viewing and hot buttons are working correctly and the security is air-tight.
When the evaluation will occur	After the technical review, the pilot and editorial review.
Who will participate in the evaluation and their expertise	This will be tech people that are experts in interface, security and digital architecture. They are qualified to verify and fix any of the glitches.

<p>Procedure for conducting test?</p> <p>Drafts of materials needed for reviewers to conduct reviews?</p>	<ol style="list-style-type: none"> 1. By email, send a cover letter with instructions and guidance to the reviewer with access to the program 2. Obtain feedback from the reviewers. 3. Classify the comments into these categories: <ol style="list-style-type: none"> a. Showstopper: fix immediately b. Must do: fix before publishing c. Nice to do: fix if there is time and budget permits 4. Hold a virtual review meeting with the reviewers to clarify any comments, if necessary. 5. Prepare an action plan to address the comments and make corrections. 6. Repeat the process for second draft.
<p>Guidelines of the Production Review</p>	<p>They will look for any potential problems between browsers or devices, software problems, hot spots, downloading or viewing issues as well as perform a load test. and test security.</p>
<p>Documents to be drafted.</p> <p>See appendix.</p>	<ul style="list-style-type: none"> ▪ Invitation to participate ▪ Reminder of the production review ▪ Thank you note ▪ Invitation to review meeting
<p>Plan to integrate feedback from the evaluation</p> <p>See appendix</p>	<p>Initial sample of the action plan: Comment/Priority (A,B,C)/Person Responsible/Date to be changed</p>

Formative Evaluation for Intervention 2

Review 1: Technical Review for Intervention 2

Theory from (Carliner, 2015) and template (Fletcher, 2018).

Purpose of the evaluation	The purpose of this review is to make sure that the information is accurate and complete and the registration form and confirmation is complete, accurate and the most appropriate.
When it will occur	At the end of the first and second draft.

<p>Who will participate in the evaluation and the expertise they bring</p>	<p>There will be eight subject matter experts reviewing it, a representative of the English Montreal School Board, a representative of the CSSMB, a representative of the CSDM, a representative of the Lester B. Pearson School Board, a representative of the <i>Ministère de l'éducation</i>, as well as a member of the <i>Fédération des établissements d'enseignement privé</i> and two parents that work in education but have also spent extensive energy navigating researching and finding schools and information about them. These people have insight into what should be input initially for the user creation for auto-fill and what should be supplementary and specific to different schools.</p>
<p>Guidelines</p>	<p>Look for inaccuracies in the information, where the registration for and confirmation are incomplete, vague, or misleading.</p>

<p>Procedure for conducting reviews</p>	<ol style="list-style-type: none"> 1. By email, send a cover letter with instructions and guidance to the reviewer. Included are: <ol style="list-style-type: none"> a. The storyboards b. The prototypes c. Five auto-filled registration forms and five confirmation pages and e-mails to schools with the registration information and to confirmation of application to parents 2. Obtain feedback from the reviewers. 3. Classify the comments into these categories: <ol style="list-style-type: none"> a. Showstopper: fix immediately b. Must do: fix before publishing c. Nice to do: fix if there is time and budget permits 4. Hold a virtual review meeting with the reviewers to clarify any comments, if necessary. 5. Prepare an action plan to address the comments and make corrections. 6. Repeat the process for second draft.
<p>Documents to be drafted: See appendix.</p>	<ul style="list-style-type: none"> ▪ Cover letter ▪ Reminder ▪ Thank you note ▪ Invitation to review meeting

<p>Plan to integrate feedback from the evaluation See Appendix</p>	<p>Initial sample of action plan: Comment/Priority (A,B,C)/Person Responsible/Date to be changed</p>
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Review 2: Pilot Test for Intervention 2

Theory from (Carliner, 2015) and template (Fletcher, 2018).

<p>Purpose of the evaluation</p>	<p>The purpose of this test run is to identify potential flaws in the program in its use by the performers. It will also test the wizard that guides parents through the program. The people testing it will be parents.</p>
<p>When the evaluation will occur</p>	<p>After the technical review and before the copyediting review.</p>
<p>Who will participate in the evaluation and their expertise</p>	<p>We will recruit 4 X 5= 20 parents, who will each receive a compensation of \$300. These people are able to give feedback from the point of view of someone using it without knowing anything about it.</p>

<p>Procedure for conducting test?</p> <p>Drafts of materials needed for reviewers to conduct reviews?</p>	<ol style="list-style-type: none"> 1. Schedule the pilot runs at a different time for each one, so that they may be observed and interacted with as they do it on zoom (URL, date and time of the meeting) 2. Recruit pilot learners with the characteristics previously mentioned. 3. Offer the program. <ol style="list-style-type: none"> a. Observe or interact with them as they do it. b. Have pilot learners complete level 1 evaluation and level 2 evaluation. 4. Prepare an action plan to address feedback. (If appropriate)
<p>Guidelines of the pilot test</p>	<p>We will be looking for where parents seem to not understand or have difficulty and try and figure-out why or if something isn't working well or is unclear. The Level 1 and Level 2 evaluations must also gauge reaction and learning and what can be improved based on the results.</p>
<p>Documents to be drafted.</p> <p>See appendix.</p>	<ul style="list-style-type: none"> ▪ Invitation to participate ▪ Reminder of the pilot run ▪ Thank you note ▪ Invitation to review meeting
<p>Plan to integrate feedback from the evaluation</p> <p>See appendix.</p>	<p>Initial sample of the action plan: Comment/Priority (A,B,C)/Person Responsible/Date to be changed</p>

Review 3: Editorial and Branding/Visual for Intervention 3

Theory from (Carliner, 2015) and template (Fletcher, 2018).

Purpose of the evaluation	<p>The purpose of the editorial review is to:</p> <ol style="list-style-type: none"> 1) Identify any issues in the organization and clarity of the materials 2) Fix issues in the content related to grammar, spelling, and punctuation 3) Ensure compliance to the design template and combined branding guidelines of <i>Le Ministère de l'Éducation and La Ville de Montréal</i>.
When it will occur	<p>Developmental review: At the end of the first draft.</p> <p>Copyediting editorial and branding review: At the end of the final draft.</p>
Who will participate in the evaluation and expertise they bring	<p>(Name) is an experienced editor editor.</p> <p>(Name) is an Human Performance Technologist and Performance Improvement expert.</p> <p>(Name) is the head of the graphics team and the creator of the project's graphic design guidelines. She is an expert in their aesthetics.</p>

Guidelines	<p>The editor will be looking for grammatical errors. She will also look for formatting inconsistencies, use of fonts, bold, italics, etc.</p> <p>The Human Performance Technologist will verify the structure and clarity of the material as well as where ideas may be broken into smaller pieces or presented more concisely or more completely as well as the organization of the information and images on the screens.</p> <p>The director of the graphics team will verify the consistency in the branding and company template as well as formatting inconsistencies and the esthetics.</p>
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Procedure for conducting reviews	<p>Copyediting, instructional and branding/esthetics review:</p> <ol style="list-style-type: none">1. By email, send a cover letter with instructions and guidelines to the reviewer. Attach the following materials:<ol style="list-style-type: none">a. Five auto-filled registration formsb. Five confirmation pages and e-mails2. Receive comments from reviewer.3. Classify the comments based on the following scale:<ol style="list-style-type: none">a. Showstopper: fix immediatelyb. Must do: fix before publishingc. Nice to do: fix is time and budget permit4. Hold a virtual review meeting with the reviewer to resolve any unclear comments, if required.5. Do the necessary and feasible corrections. <p>Branding template review:</p> <ol style="list-style-type: none">1. By email, send a cover letter with instructions and guidelines to the reviewer. Attach the following materials:<ol style="list-style-type: none">d. The storyboardse. The prototypes2. Receive comments from reviewer.3. Classify the comments based on the following scale:<ol style="list-style-type: none">a. Showstopper: fix immediately
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Documents to be drafted for the copyeditor, instructional designer and branding/marketing expert See appendix.	<ul style="list-style-type: none"> ▪ Cover letter ▪ Reminder ▪ Thank you note
Plan to integrate feedback from the evaluation See appendix	Initial sample of action plan: Comment/Priority (A,B,C)/Person Responsible/Date to be changed

Review 4: Production Review for Intervention 2

Theory from (Carliner, 2015) and template (Fletcher, 2018).

Purpose of the evaluation	The purpose of this is to make sure that there aren't technical glitches when it is opened on different devices and browsers and that all of the downloading, viewing and hot buttons are working correctly and the security is air-tight.
When the evaluation will occur	After the technical review, the pilot and editorial review.
Who will participate in the evaluation and their expertise	This will be tech people that are experts in interface, security and digital architecture. They are qualified to verify and fix any of the glitches.

<p>Procedure for conducting test?</p> <p>Drafts of materials needed for reviewers to conduct reviews?</p>	<ol style="list-style-type: none"> 1. By email, send a cover letter with instructions and guidance to the reviewer with access to the program 2. Obtain feedback from the reviewers. 3. Classify the comments into these categories: <ol style="list-style-type: none"> a. Showstopper: fix immediately b. Must do: fix before publishing c. Nice to do: fix if there is time and budget permits 4. Hold a virtual review meeting with the reviewers to clarify any comments, if necessary. 5. Prepare an action plan to address the comments and make corrections. 6. Repeat the process for second draft.
<p>Guidelines of the Production Review</p>	<p>They will look for any potential problems between browsers or devices, software problems, hot spots, downloading or viewing issues as well as perform a load test. and test security.</p>
<p>Documents to be drafted.</p> <p>See appendix.</p>	<ul style="list-style-type: none"> ▪ Invitation to participate ▪ Reminder of the production review ▪ Thank you note ▪ Invitation to review meeting
<p>Plan to integrate feedback from the evaluation</p> <p>See appendix</p>	<p>Initial sample of the action plan: Comment/Priority (A,B,C)/Person Responsible/Date to be changed</p>

Some other aspects of the formative evaluation include aspects of whether the project is running on time at various benchmarks, whether it is adhering to its planned budget and checking-in with stakeholders as it is developed to verify that it is moving in the right direction from their vantage point.

Summative Evaluation

What follows are the proposed ways that the performance program will be evaluated. Evaluation helps us to determine if the program achieved what it set-out to achieve. There will be evaluation on four levels: Level 1 Engagement, Level 2 Individual Performance, Level 3 Organizational Performance as well as Level 4 Impact. Each level of evaluation will consider both process and product evaluation.

Level 1 Engagement Evaluation

This is meant to measure how parents felt about the performance program, in particular we will focus on the tool to find schools and register for multiple schools on one portal. There could be a pop-up or page once a parent has completed registration and an e-mail or phone call one year later to those that registered online or with a support person to ask these questions:

1. Did you use the Montreal Educational Support Program:
 - a) Online through the Montreal Education Portal
 - b) In person/videochat/telephone with an Educational Support Person
 - c) A mix of in-person and online

2. How easy was the program to use?

1	2	3	4	5
Very Easy	Easy	Not hard, but could be better	Difficult	Impossible

3. How easy was it to get support when you encountered difficulties

1	2	3
Easy	Not easy, but possible	Impossible

4. Which of the following functions did you use? (Checklist)

- Brochure or video about Montreal schools and the school system
- The worksheet to identify family needs, values and priorities
- The “Find Schools” filtered search tool
- The “My Schools” list to compare schools and order hierarchically
- The Open House Buttons to register for open houses or watch videos
- The Register function to register for all desired schools and to drop registration from schools

For each option chosen, a version of question 5 would be formulated.

5. If you used X, would you say

- a) If it weren't for the help this tool gave, I would not have chosen the option I did
- b) Although this tool didn't help me decide what I would choose, it informed my decision
- c) This tool helped me save a lot of time
- d) The tool didn't work properly and was frustrating, time zapping or not useful.
- e) I already knew everything and this didn't inform me or save me time

6. How would you describe the registration process for multiple schools at one place:

- a) It was easy and saved time
- b) It was difficult, hard to understand, had glitches, was incomplete or time-consuming.

8. How would you rate your satisfaction with the educational support program and the resulting school your child is attending:

5	4	3	2	1
Very happy	Happy	Indifferent	Not Satisfied	It was horrible

9. If you had previously gone through this process without the tools of the education support program how would you say this time around was:
 - a) It was alot smoother
 - b) It was easier but could still be improved
 - c) Because we already had experience, it wasn't that useful
 - d) It didn't help us
 - e) It made the process even harder
10. What was the most useful element or tool of the Educational Support Program?
11. What would you improve or change?

Level 2 Individual Evaluation

This section is meant to give questions to evaluate the program and its results. Because the performer is under no obligation to do this participate, use the support or pass a test, outside of registering for schools through the program, these questions are for them to self-assess their performance. The criterion is that 50% more parents are satisfied after three years of the program and monitoring parent satisfaction and that by doing this program learned enough to feel they had the knowledge to navigate this process. There would also have to be an evaluation for each of the steps:

1. Rate on a scale of 1 to 10 where 10 is outstanding, your understanding the characteristics of education options in Montreal and the school system
2. Rate on a scale of 1 to 10 where 10 is outstanding the definition the families priorities, needs and values
3. Rate on a scale of 1 to 10 where 10 is outstanding ability to identify the available education options
4. Rate on a scale of 1 to 10 where 10 is outstanding ability in evaluating schools during open houses and information nights
5. Rate on a scale of 1 to 10 where 10 is outstanding having the tools to complete the registration process for multiple institutions
6. Rate on a scale of 1 to 10 where 10 is outstanding ability to clearly rank the schools of interest hierarchally in-terms of priorities, values and needs
7. Rate on a scale of 1 to 10 where 10 is outstanding satisfaction with current education option
8. Rate on a scale of 1 to 10 where 10 is outstanding ability to seek out another with confidence if dissatisfied

In terms of program evaluation, there could also be evaluations of the Educational Support People and the online support people.

Level 3 Organizational Evaluation

Ideally this would also look at how other performers, like the institutions and their employees changed their behaviour. This could be monitored through interviews with those involved in the performance program to evaluate how it impacted their work and the process.

Some questions:

1. By implementing a system that actually considers satisfaction and comes from a place of support in informing parents, how does this shift the outlook and of the institutions that interact with parents?
2. How do those who work in the program perceive it?
3. Where do they think it could be improved?
4. Who did it not cater to?
5. How has this program contributed to collaboration between municipal and provincial government?
6. What were the results?
7. How has education benefitted from the involvement of the city?
8. How has the Ministère de l'Éducation positioned themselves through this program that focuses more on parents? How has it changed their approach or how has it impacted their level of governing?
9. How often did parents use the support functions, for what, and what does that tell us that could be improved?
10. What were the complaints received about the program? How can they be addressed?
- 11.

Level 4 Impact Evaluation

1. Document the number of parents used which function of the portal online or in-person.
2. Did the program achieve what it set out to and reduce dissatisfaction with the educational option chosen by 50% over 3 years?
3. Document how many children moved educational option and why.
4. What percentage of kids were happy in their educational option?
5. Did Montreal attract and retain more people and families?
6. Did property tax revenue increase?
7. Did La Ministère de l'Éducation reduce administrative costs by reducing the number of kids being moved around?
8. What has changed in practice for the institutions?
9. For parents that used this tool to change their child's school, were they able to obtain a better result or feel more confident this time around?

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Formative Evaluation Appendix

E-mail templates for the Technical Review

Adapted from Carliner (2015) and Fletcher (2018)

Cover letter	<p>Subject line: Technical review of “Central Portal to Montreal’s Schools”</p> <p>Dear (SME),</p> <p>On behalf of the <i>Ministère de l’Éducation and the Ville de Montréal</i>, I have been commissioned to reach out to you to review a part of a central portal to help identifying and registering for schools in Montreal for parents, especially those relocating to or within Montreal.</p> <p>Based on your expertise concerning education in Montreal, I am hoping you will be able to give feedback on the draft program. I am looking to ensure that the content of the course is accurate, up-to-date, and based on Human Performance and Performance Improvement-sound research.</p> <p>I’ve attached the story boards and prototypes.</p> <p>Will you be available to provide me with your feedback by (Deadline)</p> <p>Thank you for your collaboration in ensuring the success of this program.</p> <p>Best regards, Mélissa Simard</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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Reminder	<p>Subject line: Reminder: Technical review of “Central Portal to Montreal’s Schools”</p> <p>Dear (SME),</p> <p>Thank you again for agreeing to participate in the technical review of the “Central Portal to Montreal’s Schools”.</p> <p>This is a friendly reminder that I’m looking forward to receiving your feedback by (Deadline). Please let me know if this deadline still works for you.</p> <p>Thank you again for your participation in this project.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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<p>Thank you note and introducing the idea of a meeting</p>	<p>Subject line: Thank you for your technical review of “Central Portal to Montreal’s Schools”</p> <p>Dear (SME),</p> <p>Thank you very much for your feedback on the course. I’ll be reviewing your comments and making changes where appropriate.</p> <p>If I find that anything is unclear, I would hope that we could schedule a meeting to better understand your feedback. If you agree, we will need to meet at least two weeks ahead of the delivery of the program on (date). I will send a doodle with possible meeting times, if necessary.</p> <p>Thank you again for your time and help.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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Invitation to review meeting	<p>Subject line: Review meeting about “Central Portal to Montreal’s Schools”</p> <p>Dear (SME),</p> <p>Thank you again for your feedback on the program. It is precious. I have a question about some of the comments you made, so I would like to arrange a 20 minute virtual meeting.</p> <p>Here is the link to the doodle, so you can confirm your availability. I will send an invitation subsequently.</p> <p>Thank you in advance.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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E-mail Templates for the Editorial, Instructional, Esthetic and Branding Review

Table adapted from Carliner (2015) and Fletcher (2018)

Cover letter to the copyeditor	<p>Subject line: Copyediting Review of “Central Portal to Montreal’s Schools”</p> <p>Dear (Copyeditor),</p> <p>I have been commissioned to develop the “Central Portal to Montreal’s Schools” by <i>Ministère de l’Éducation and the Ville de Montréal</i>. The central portal is part of a performance improvement campaign meant to raise satisfaction of parents and children with their education options in Montreal and to lower the amount of kids being moved around.</p> <p>Based on your expertise in editing, I am hoping to get feedback on the draft program. I am looking to ensure that the content of the course is: (1) without grammatical, spelling or punctuation errors; (2) The formatting, fonts, bold, italics etc are consistent</p> <p>I’ve attached the storyboards, prototypes, registration forms and automatic emails.</p> <p>Will you be available to provide me with your feedback by (Deadline)?</p> <p>I will contact you later for a second review closer to the release.</p> <p>Thank you for your collaboration in ensuring the success of this new program.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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<p>Cover Letter for the Marketing/ Branding/ Esthetic Reviewer</p>	<p>Subject line: Branding/Esthetic Review of “Central Portal to Montreal’s Schools”</p> <p>Dear (Branding and Graphic Design specialist),</p> <p>I have been commissioned to develop the “Central Portal to Montreal’s Schools” as part of a larger performance improvement campaign by the <i>Ministère de l’Éducation and the Ville de Montréal</i>. The portal aims to streamline the process of finding and registering for schools and ultimately obtaining the best educational option.</p> <p>Based on your expertise, I am looking for your feedback. (1) The portals screens, forms and emails fit the government branding template or design guidelines (2) The screens are visually appealing and easy to read and understand visually</p> <p>Here is access to the program.</p> <p>Will you be available to provide me with your feedback by (Deadline)?</p> <p>Thank you for your collaboration in ensuring the success of this new course.</p> <p>Sincerely, Mélicca</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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<p>Cover letter to the Instructional Designer</p>	<p>Subject line: Instructional Design Review of “Central Portal to Montreal’s Schools”</p> <p>Dear (Human Performance Technologist),</p> <p>I have been commissioned to develop the “Central Portal to Montreal’s Schools” for parents by the <i>Ministère de l’Éducation and the Ville de Montréal</i>. The portal, which is part of a larger Performance Improvement Campaign aims to streamline the process of finding and registering for schools and ultimately obtaining the best educational option and raising satisfaction.</p> <p>Based on your expertise in Human Performance Technology and Educational Technology, I am hoping to get feedback on the draft program. I am looking to ensure that the content of the course is: (1) well-structured and clear, (2) the chosen interventions are the best possible as is their design and development and (3) strength and organization of the text, visual and usability.</p> <p>I’ve attached the storyboards prototypes and access to what has been developed so far if you would like to do it as well as five examples of use of the search tool, its results and 5 autofilled registration forms..</p> <p>Will you be available to provide me with your feedback by (Deadline)?</p> <p>I will contact you later for a second review closer to the release.</p> <p>Thank you for your collaboration in ensuring the success of this new course.</p> <p>Sincerely, Mélicca</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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Reminder	<p>Subject line: Reminder: Review of “Central Portal to Montreal’s Schools”</p> <p>Dear (ID, Marketing/Brand Person/Copyeditor),</p> <p>Thank you again for agreeing to participate in the review of “Central Portal to Montreal’s Schools”.</p> <p>This is a friendly reminder that I’m looking forward to receiving your feedback by (Deadline). Please let me know if this deadline still works for you.</p> <p>Thank you again for your participation in this project.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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<p>Thank you note and introducing the idea of a meeting</p>	<p>Subject line: Thank you for your Review of “Selecting a School in Montreal”</p> <p>Dear (ID, Marketing/Brand Person/Copyeditor),</p> <p>Thank you very much for your feedback on the course. I'll be reviewing your comments and making changes where appropriate.</p> <p>If I find that anything is unclear, I would hope that we could schedule a meeting to better understand your feedback. If you agree, we will need to meet at least two weeks ahead of the delivery of the program on (date). I will send a doodle with possible meeting times, if necessary.</p> <p>Thank you again for your time and help.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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Invitation to review meeting	<p>Subject line: Review meeting about “Central Portal to Montreal’s Schools””</p> <p>Dear (ID, Marketing/Brand Person/Copyeditor),</p> <p>Thank you again for your feedback on the program. It is precious. I have a question about some of the comments you made, so I would like to arrange a 20 minute virtual meeting.</p> <p>Here is the link to the doodle, so you can confirm your availability. I will send an invitation subsequently.</p> <p>Thank you in advance.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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E-mail templates for the pilot test communications

Theory from (Carliner, 2015) and template (Fletcher, 2018).

Invitation to the pilot test	<p>Subject line: Request for participation in pilot “Central Portal to Montreal’s Schools”</p> <p>Dear (Tester),</p> <p>I am emailing to request your participation in a pilot “Central Portal to Montreal’s Schools” that the <i>Ministère de l’Éducation and the Ville de Montréal</i> commissioned for families relocating to and within Montreal. I am contacting you after you responded to our call for testers. Your testing and feedback while you use the portal is invaluable to us in improving the program. As a gesture of our appreciation, we are offering \$300. We believe it will take it will take 90-120 minutes.</p> <p>Please confirm your participation by (date). We will send a testing registration calendar, send a zoom link and access to the program upon confirmation.</p> <p>Thank you in advance for your time and consideration.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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Reminder	<p>Subject line: Reminder: “Pilot course on Zoom (Date, starting time-end time)”</p> <p>Dear (Learner),</p> <p>Thank you for agreeing to participate in the pilot offering of “Selecting a School in Montreal” and sharing your availability on Doodle.</p> <p>It will be on (date) from (time) to (time).</p> <p>This is a reminder that that course can be accessed through the following link:</p> <p>www.....com</p> <p>We also ask that you log-in to zoom for screen sharing. Zoom meeting link Meeting number Password</p> <p>Please confirm your presence and feel free to ask any questions.</p> <p>Thank you for your help in making this course better.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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Thank you note	<p>Subject line: “Thank you for your participation in the pilot test”</p> <p>Dear (Learner),</p> <p>Thank you again for your participation in the pilot test and for your feedback on the course. Your comments are precious to the team working on this project.</p> <p>The cheque for \$300 has been sent. All the best.</p> <p>Sincerely, Mélissa</p> <p>4coinsdelatable@gmail.com (514)812-2003 4coinsdelatable.com/ID&EdTech</p>
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Feedback Action Plan Template

Comment	Priority	Person Responsible	Date to be changed by
Comment 1	A/B/C		

Comment	Priority	Person Responsible	Date to be changed by
Comment 2	A/B/C		
Comment 3	A/B/C		