

Usability Test Plan, Test, and Report

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Reflective Memo: Usability Testing Report on Microsoft Word – Mixed-Level Tasks**Overview**

This project was carried out at the University of New Mexico's Zimmerman Library between June 22 and June 24, 2025. This formative usability test evaluated Microsoft Word's usability among three international students (19–21 years old) at UNM's CELAC program, representing beginner to intermediate proficiency levels. The test was conducted in-person at the Graduate Commons using Word 365 and employed a think-aloud protocol with pre- and post-test questionnaires. It focused on six formatting/collaboration tasks (e.g., headers, Track Changes) to identify pain points in feature discoverability and workflow efficiency. The purpose of the test was to bridge gaps between Word's complex interface and diverse users' needs, aligning with Rubin's usability principles and Norman's design theories.

Theoretical Framing

The overall approach including design, execution, and reporting of this usability test were deeply informed by principles from usability testing, user-centered design, and technical and professional communication (TPC). Rubin and Chisnell's *Handbook of Usability Testing* provided the foundation for structuring the test as a moderated, task-based session with a triangulated data collection method (Ch. 6 - 8). To capture both user expectations and satisfaction, I included both pre- and post-test questionnaires in line with Rubin's emphasis on measuring both baseline knowledge and user satisfaction (Ch. 14). In analyzing participants' struggles, Donald Norman's *The Design of Everyday Things* contributed significantly, particularly through the concepts of "the gulf of execution" and "signifiers," which helped diagnose why users hesitated or misunderstood interface cues. Finally, Robin Williams' *Non-Designer's Design Book* (Ch. 10 - 13) informed the layout and instructional clarity of the test

document, emphasizing simplicity, contrast, and alignment to reduce visual clarity and cognitive strain for users.

Testing Group Assembly

Considering various demographic factors such as age, gender, and tech-savviness, I selected a testing group that was both diverse and precise. All three participants were international students from UNM's Center for English Language and American Culture (CELAC), ranging in age from 19 to 21. Their MS Word experience ranged from beginner to intermediate, with gender balance and varied educational backgrounds. I chose this mix intentionally to explore how different levels of digital literacy and previous exposure influenced task performance.

Test Execution: Successes and Struggles

The usability test was conducted over three days in a quiet setting using Microsoft Word 365 on Windows 10 laptops. Running the test involved guiding participants through a series of structured tasks. Participants were guided through a standardized set of six tasks, with a moderator providing task prompts and encouraging think-aloud responses. My successes included smooth facilitation and engaging participants effectively, resulting in rich verbal feedback. However, challenges during testing included participants skipping key steps, misinterpreting the wording of tasks, or relying on their usual habits instead of trying out new features in the interface. While I used audio recordings for notetaking, no screen recordings were done due to consent limitations.

Data Analysis and reporting

The analysis was both rewarding and challenging. Success was found in identifying clear trends and actionable insights from user feedback. Logging quantitative metrics such as task completion and error rates were easy, but understanding qualitative feedback required close review of notes

and audio recordings. Using Norman's framework helped connect users' actions to how they were thinking, while Rubin's focus on using multiple types of data made it easier to confidently identify usability problems. Writing the report involved a balance between clear storytelling and thorough analysis. Structuring results by task and connecting each to specific participant quotes helped demonstrate patterns and provide strong evidence for the final recommendations.

Reflection on Learning

This usability test showed how important it is for the design of a program to match what users expect. Beginners didn't struggle because they weren't trying, but because the user-interface didn't clearly show how things worked. For example, finding the Track Changes feature or merging table cells was harder than expected, even though those are basic tasks. Doing this test helped me see how small design choices can have a big effect on how people learn and work.

Conclusion

For me, this project put the core tenets of user-centered design and usability theory into practice. Rubin's structured test planning, Norman's insights into user cognition, and Williams' visual design principles collectively shaped the methodology and outcomes of this project. Connecting this project to key theories while staying responsive to the lived experiences of actual users, I learned not only how to test usability, but how to advocate for more thoughtful and accessible technology design. This reflection confirms that theory and practice go hand in hand in the field of technical and professional communication.

Usability Test Plan for Microsoft Word Mixed-Level Tasks

Introduction

Purpose

This test plan outlines the methodology for assessing the usability of Microsoft Word’s formatting, layout, and collaboration features among users with varying levels of experience. The primary aim is to evaluate user interaction and identify usability issues. The overall goal is to identify pain points in feature discoverability, workflow efficiency, and user satisfaction, aligning with Rubin’s usability metrics and Norman’s principles of design. The test will help identify usability challenges and areas where interface or instructional improvements are needed.

Scope

The test assesses how users with varying experience levels navigate and utilize Microsoft Word’s features focusing on Rubin’s concept of learnability and Norman’s gulf of execution to assess where the interface supports or hinders user goals.

Objectives

<ul style="list-style-type: none"> • Evaluate how users locate and use key formatting and collaboration features 	<ul style="list-style-type: none"> • Assess learnability (Rubin) for beginners
<ul style="list-style-type: none"> • Identify obstacles in interface navigation, especially for beginner users. 	<ul style="list-style-type: none"> • Identify gulfs of execution (Norman) in multi-step tasks (e.g., table merging). • Evaluate signifiers (Norman) for feature discoverability.
<ul style="list-style-type: none"> • Collect qualitative and quantitative feedback to improve Microsoft Word’s usability 	<ul style="list-style-type: none"> • Provide actionable recommendations for UI improvements.

Research Questions/Hypotheses

- How do beginner users compensate for unfamiliar or unclear UI components?
- Do users of different skill levels complete the same tasks with equal success?
- Are formatting and collaboration tools (e.g., Track Changes) discoverable without instruction?

Methodology

This formative usability test would be conducted in-person with the support of a moderator. Participants would complete six structured tasks using a pre-made Microsoft Word document while following a think-aloud protocol. Initial and Follow-up (pre- and post-test) questionnaires would be used to assess user background and perception. Screen recording would be done per participants' preferences. Observations, written notes, audio notes, and follow-up questionnaire would be used to capture performance, hesitations, and feedback.

Test Type

This would be a formative usability test conducted with a moderator guiding participants through common Microsoft Word tasks. The goal would be to identify usability issues and gather feedback on how users interact with Word's interface, particularly where they struggle or get confused. Unlike performance-based tests, by observing users in real-time, the study would focus on qualitative insights observing where users hesitated, made errors, or needed help.

Participants

- **Target Users:** 3 participants with mixed expertise (beginner, intermediate).
- **Recruitment:** Non-random sampling; prioritize diversity in age, gender, and Word proficiency.
- **Inclusion Criteria:** Familiarity with Microsoft Word.

Test Setting

The sessions would be conducted in-person at the Graduate Commons in Zimmerman Library using Windows 10 laptops with Microsoft Word 365. Participants would complete the test in a controlled environment using Microsoft Word 365 on Windows 10 laptops.

Test Materials

- Microsoft Word 365 on Windows 10 laptops
- Initial and Follow-Up (pre-and post-test) questionnaires
- Task script
- Printed moderator script
- Test Word document

Test Design

- **Type:** Formative, moderated usability test (Rubin Ch. 5).
- **Approach:** Task-based with think-aloud protocol (Rubin Ch. 6).
- **Data Triangulation:** Combine quantitative metrics (task success, time) with qualitative insights (observations, quotes).

Scenario

Participants would act as a Writing Group members as they plan to join the group to learn and improve writing mechanics. As they are not very much into writing, I want to know their familiarity and prior experience of using MS Word.

Tasks

Task Number	Description	Objective
Task 1	Add a header with your name and date	Assess basic navigation
Task 2	Change the font style and size	Evaluate text styling ease
Task 3	Apply heading 1 and heading 2 styles	Text document structuring skills
Task 4	Insert and customize 3X3 table	Examine table manipulation skills
Task 5	Insert a hyperlink to a university website	Check hyperlink insertion awareness

Task 6	Use Track Changes to edit a sentence and add a comment	Assess collaborative editing features
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Data Collection

Metrics		Instruments	Analysis Plan
Performance	Subjective		
Task Success rate (binary)	Post-task ratings (ease/difficulty)	Initial (pre-test) Questionnaire: Demographics, computer literacy, Word experience	Quantitative: Compare success rates/time across proficiency levels
Time-on task	Emotional responses (frustration/satisfaction).	Follow-Up (post-test) Questionnaire: task feedback, Perceived usability, final thoughts	Qualitative: Code themes (e.g., “confusion with Track Changes”)
Error frequency (e.g., misapplied styles)		Moderator Notes: Observations, hesitations, quotes	Triangulation: Cross-reference metrics with quotes (e.g., P1’s header struggle)

Data Analysis

Quantitative Metrics	Qualitative Insights
Task success rates (binary completion)	Think-aloud transcripts
Time-on-Task: Record duration to complete each task	Post-task interviews
Error Frequency	

Roles and Responsibilities

- **Moderator:** Facilitate session, provide task prompts, guide user if necessary
- **Note-Taker:** take notes, observe user behavior, document task times and errors
- **Analyst:** Synthesizes data into findings/recommendations
- **Participants:** Complete tasks, verbalize thought process, answer pre- and post-test questions

Timeline

Phase	Duration
Planning	1 week
Recruitment	1 week
Testing	1-3 days

Analysis/Reporting	1 week
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Ethical Considerations

- **Consent:** Participants give verbal consent acknowledging voluntary participation
- **Privacy:** No screen recordings; anonymize data in reports.
- **Incentives:** None
- **Withdrawal:** Participants can withdraw at any stage

Deliverable

1. **Test Report:** Key findings, severity matrix
2. **Recommendations:** UI improvements
3. **Appendices:** Initial and Follow-up (pre and post-test) Questionnaires, raw notes.

Appendices

- Initial (Pre-Test) Questionnaire
- Follow-Up (Post-Test) Questionnaire
- Word Task Document

Microsoft Word – Mixed-Level Tasks

Executive Summary

This Microsoft Word usability test explored user interaction with several formatting, layout, and collaboration features among three users with varying experience levels. Tasks included mixed-level functions including applying headers, styling text, inserting and customizing a table, creating hyperlinks, and using the track changes features for collaborative editing. While all users navigated basic tasks easily, intermediate and advanced tasks highlighted discoverability challenges, particularly with table customization, hyperlink, and tracking changes. Key recommendations include enhancing interface guidance and reducing steps for multi-part tasks like table merging and link insertion.

Introduction

Microsoft Word serves as the dominant word processing tool across academic, business, and personal contexts, yet its many features quite often create usability challenges for many users, particularly for beginner and intermediate users. This test explores how users with varying proficiency levels complete six essential but commonly needed formatting and editing tasks, with an emphasis on three core usability dimensions: (1) navigation efficiency (Rubin's "learnability" principle), (2) workflow interruptions (Norman's "gulf of execution"), and (3) feature discoverability (Norman's "signifiers" concept).

Methodology

In this usability test, three participants with varying levels of experience in Microsoft Word were asked to complete a series of tasks involving document formatting and collaborative editing. An Initial (pre-test) and a Follow-up (post-test) questionnaire were also given to the participants. The Initial (pre-test) questionnaire was done to *establish baseline proficiency* and contextualize results (Rubin, Ch. 6), this questionnaire identifies participants' prior experience with Word features, learning preferences, and digital literacy levels critical for interpreting task performance through Norman's "knowledge-in-the-head" principle. Whereas the Follow-up (post-test) questionnaire measured perceived *usability* and emotional responses (Rubin Ch. 14), this tool captures immediate pain points (e.g., frustration with table customization, Track Changes) and aligns with Norman's emphasis on evaluating user satisfaction alongside task success.

The study followed a task-based testing approach where the tester being a moderator evaluated how effectively participants completed commonly needed formatting and editing tasks. The sessions were conducted in-person at the Graduate Commons in Zimmerman Library using Windows 10 laptops with Microsoft Word 365. Participants completed the test in a controlled environment using Microsoft Word 365 on Windows 10 laptops. The moderator guided each session and took notes on participant behavior and task performance. Sessions were not recorded owing to permission issues by the participants, but the moderator took notes in abundance both in written and audio recorded form for further analysis of interaction patterns and usability issues.

Participants

This test had the goal of testing Microsoft Word usability with participants of varying level expertise; therefore, the only requirement for the participants was to be familiar with Microsoft Word. Three individuals participated in this test study, representing a range of different genders, different age groups, and varying Microsoft Word usage experience.

Participant 1. A female, 19 years old, attending UNM’s Center for English language and American Culture (CELAC). She is attending Intensive English classes at the center and plans to start her freshman at UNM in the fall 2025 semester. She has a beginner-level experience of MS Word.

Participant 2. A female, 21 years old, attending UNM’s Center for English language and American Culture (CELAC). She is attending Intensive English classes at the center and plans to start her freshman at UNM in the fall 2025 semester. She has more than beginner-level experience of MS Word as she has already used it quite often while doing her undergrad first-year at her home country.

Participant 3. A male, 21 years old, attending UNM’s Center for English language and American Culture (CELAC). He has moderate level MS Office experience and intermediate level familiarity with MS Word. He has already completed an associate degree from his home country and have used MS Word for various purposes including writing, resume, cover letters, etc.

Test Setting

- In-person observation with no screen recording
- Note taking both written and audio
- Devices: Windows laptops running Microsoft Word 365
- Think-aloud protocol used
- Average test duration: 25–30 minutes

Data Collection

Data were collected during the sessions. Both quantitative and qualitative data were collected through a combination of direct observation, note taking, and participant self-reporting. Moderator tracked task completion, time on task, and noted any user errors or hesitations. In addition, participants completed an Initial (pre-test) questionnaire to provide context on their computer and Word experience, and a Follow-Up (post-test) questionnaire to capture their perceptions of task difficulty and interface usability. These measures helped triangulate findings by combining behavioral data with user-reported feedback.

Type of Usability Test

This was a formative usability test conducted with a moderator guiding participants through common Microsoft Word tasks. The goal was to identify usability issues and gather feedback on how users interact with Word’s interface, particularly where they struggle or get confused. Unlike performance-based tests, by observing users in real-time, the study focused on

qualitative insights observing where users hesitated, made errors, or needed help. The goal was not to benchmark performance but to inform design and instructional improvements.

Scenario and Tasks

Test Scenario. You work as a Writing Consultant at the Center for Teaching and Learning (CTL) of your university. The center aims to provide peer to peer support to the students. You are planning to run a “Writing Support Group” during fall 2025 semester. You have already initiated an email with different professors, teaching associates, teaching assistants, and some department administrators about this writing group. You have been contacted by three international students through their center’s teacher who is your friend. The students want to join that group to learn and improve writing mechanics. As they are not very much into writing, you want to know their familiarity and prior experience of using MS Word.

Tasks. Each participant was given a series of tasks to complete. All the participants were given a word document and were asked to complete the tasks listed below. Keeping in view the participants international background and Initial (pre-test) Questionnaire responses, these tasks were chosen because they represented mixed-level challenges for two reasons: I can better gauge their skills and familiarity with MS Word and check how good user interface MS Word has.

Complete the following series of tasks:

1. Add a header with their name and the date.
2. Change the font style and size of a paragraph.
3. Apply Heading 1 and Heading 2 styles to text.
4. Insert and customize a 3x3 table (merge cells, adjust column width).
5. Insert a hyperlink to a university website.
6. Use Track Changes to edit a sentence and add a comment.

Data Analysis

The collected data were analyzed both quantitatively and qualitatively to identify usability patterns across tasks and participants. The collected data, including task success rates, time-on-task metrics, and qualitative feedback, were analyzed through triangulation to identify recurring usability patterns. This combined approach provides a holistic view of user behavior and highlights areas of friction, confusion, or efficiency in Microsoft Word's interface. This mixed-method approach aligns with Rubin’s framework for diagnosing both *what* users struggled with and *why*.

Results: Task Observations

Task 1: Add a Header

- **All participants** completed the task.
- **P1** took longer to find the “Insert > Header” path.
- **P3** used double-click shortcut at top margin.

Observation: Beginners are less familiar with shortcuts and tend to navigate through menus manually.

Task 2: Change Font Style and Size

- Completed smoothly by all participants.
- P1 hovered over font names for preview.
- P2 did use the “styles” pans.
- P3 used the “Styles” pane and keyboard shortcuts.

Observation: All participants found the Home tab intuitive for basic text styling.

Task 3: Apply Heading Styles

- P1 manually bolded and enlarged the text, skipping styles.
- P2 and P3 used the built-in Heading 1 and Heading 2 styles correctly.

Observation: P1 didn’t realize that applying formatting manually doesn’t structure the document semantically.

Task 4: Insert and Customize a 3x3 Table

- P1 inserted the table but had difficulty merging cells.
- P2 adjusted width successfully but needed guidance on merging.
- P3 completed all actions quickly using the Layout tab.

Observation: Merging cells and resizing columns were non-obvious for novice users; "Layout" vs. "Table Design" tabs caused confusion.

Task 5: Insert a Hyperlink

- P1 did not know nothing of it. She needed guidance.
- P2 copied the URL but didn’t use the Insert tab—needed guidance.
- P3 used “Insert > Link” easily.

Observation: Beginners expect to paste URLs directly; they may miss formatting options like display text or tooltip.

Task 6: Use Track Changes and Add a Comment

- P1 couldn’t locate “Track Changes” without assistance.
- P2 toggled it correctly but forgot to “Accept” the change.
- P3 completed both tasks with no issues and used Review tab efficiently.

Observation: Track Changes is difficult to discover and understand for new users. It also requires multiple steps (turn on, make edit, accept/reject, add comment).

Observation	Participant 1	Participant 2	Participant 3
Header addition	Struggled	Smooth	Smooth
Font style change	Smooth	Smooth	Smooth
Heading application	Manual format	Correct styles	Correct styles
Table customization	Difficult	Needed help	Efficient
Hyperlink insertion	Needed guidance	Needed guidance	Smooth
Track Changes usage	Needed help	Forgot steps	Efficient

Quantitative Metrics:

- **Task success rates** (binary completion) and **time-on-task** were recorded to measure *efficiency* (Rubin’s “performance metrics”).
- **Error frequency** (e.g., misapplied Styles, incorrect Merge Cell actions) was logged to identify *learnability barriers* (Norman’s “slips vs. mistakes”).

Qualitative Insights:

- **Think-aloud transcripts** captured *decision-making processes*, revealing moments where users struggled with *feature discoverability* (e.g., searching for Track Changes in the Ribbon).
- **Post-task interviews** probed *emotional responses* (frustration/satisfaction) to align with Rubin’s “user satisfaction” framework.

Triangulation Approach:

By cross-referencing quantitative metrics (e.g., slow task time) with qualitative data (e.g., verbalized confusion about Table Tools), we pinpointed *why* specific features caused friction, addressing Norman’s call to diagnose root causes, not just symptoms.

Participant Quotes

Task: Adding a Header

- **P1 (Beginner):**
“I thought the header would be under the ‘View’ tab... I didn’t expect it to be in ‘Insert.’”

Task: Changing Font Style and Size

- **P2 (Beginner /Intermediate):**
“Changing font is easy—I do that all the time when I’m writing reports.”

Task: Applying Heading Styles

- **P1 (Beginner):**
“I just made the text bold and bigger... I didn’t know I was supposed to use something called ‘Heading 1.’”
- **P3 (Intermediate):**
“Using heading styles is key for structure and the table of contents—it’s second nature for me now.”

Task: Inserting and Customizing a Table

- **P2 (Beginner /Intermediate):**
“I had to click around to find the merge cell option—it’s not as obvious as I expected.”
- **P1 (Beginner):**
“I was worried I’d mess up the table when I tried to resize it.”

Task: Inserting a Hyperlink

- **P1 (Beginner):**
“I usually just paste the link—I didn’t know you could change the text that shows.”

Task: Track Changes and Comments

- **P1 (Beginner):**
“I’ve heard of Track Changes, but I’ve never used it before—took me a while to find it.”
- **P3 (Intermediate):**
“This is my favorite feature. I use it constantly for collaborative editing.”

Key Findings

Difficulties were noted in table customization and Track Changes, highlighting the need for clearer signifiers and tutorials (Norman, Chapter 1).

Issue	Severity	Affected Users
Track Changes feature difficult to find and use	High	P1, P2
Table customization tools not clearly labeled	Medium	P1, P2
Manual formatting misused in place of styles	Medium	P1
Inserting hyperlinks lacks intuitive entry point	High	P1
Inserting hyperlinks lacks intuitive entry point	Medium	P1

Recommendations

1. **Add Smart Prompts for Advanced Tools**
When a user manually formats headings, suggest applying a “Heading style” to enable document structure features like TOC.
2. **Simplify Table Customization UI**
Merge cell and layout tools could be surfaced directly when a table is selected (as floating tools or quick-access icons).
3. **Improve Track Changes Onboarding**
Include an in-app tip or guided walkthrough when “Review” tab is first opened in a document.
4. **Insert Hyperlink via Context Menu**
Enable right-click hyperlink insertion for selected text more prominently for beginners.

Actionable Steps

- Design in-app tutorials for complex tasks
- Conduct user feedback sessions to refine and improve interface changes

Appendices

1. Initial (pre-test) Questionnaire
2. Follow-up (post-test) Questionnaire
3. Word Task Document

Usability Testing: Microsoft Word

Initial (Pre-Test) Questionnaire

Section 1: Background Information

- 1. Name or Participant ID (optional): _____
- 2. Age Range: Under 18 18–25 26–35 36–50 51+
- 3. Occupation/Field of Study: _____
- 4. How often do you use a computer? Daily Few times/week Rarely
- 5. Device most used: Laptop Desktop Tablet Smartphone

Section 2: Computer Literacy and Confidence

- 6. Rate your overall computer skills: Beginner Intermediate Advanced
- 7. Comfort using new software: Not comfortable Somewhat Very comfortable
- 8. Formal computer training? Yes No If yes, specify: _____

Section 3: Experience with Microsoft Word

- 9. Frequency of use: Daily Weekly Occasionally Rarely Never
- 10. Features used: Fonts Tables Heading Styles Hyperlinks TOC Track Changes
- 11. Rate your skill level in Word: Beginner Intermediate Advanced
- 12. Difficult/confusing features? _____
- 13. Main use of Word: School Work Personal Other: _____
- 14. Version used: Word 365 2019 Older Not Sure
- 15. Use keyboard shortcuts? Never Occasionally Frequently
- 16. Typical use (e.g. papers, reports, resumes, etc.): _____
- 17. Used Word for collaboration before? Yes No

Usability Testing: Microsoft Word

Follow-Up (Post-Test) Questionnaire

Section 1: Task Experience

- 1. Ease of completing tasks: Very Easy Easy Neutral Difficult Very Difficult
- 2. Most difficult/confusing task(s) and why: _____
- 3. Easiest or most familiar task(s): _____
- 4. Needed more guidance? If yes, when? _____
- 5. Any unfamiliar features or terms? Yes No If yes, list: _____

Section 2: Interface & Design Perception

- 6. Layout intuitiveness: Very Intuitive Somewhat Neutral Not Intuitive
- 7. Any confusing/slowing parts of the design? Yes No Explain: _____

Section 3: Final Thoughts

- 8. One thing to improve in Word: _____
- 9. Confidence in repeating tasks independently: Not Somewhat Confident Very
- 10. Additional comments/suggestions: _____

Center for Teaching and Learning

Mission

The Center for Teaching and Learning at UNM collaborates with students, instructors, and staff to foster the continued growth of an inclusive community of learners by creating spaces and opportunities for reflection and dialogue around evidence-based and learner-centered approaches to teaching and learning. By embracing a growth mindset, we aim to listen with compassion and meet students and instructors where they are. As a comprehensive team, we strive to create and evolve services that meet the educational needs of all Lobos.

The Center for Teaching and Learning partners with faculty, students, and staff to create equitable learning environments that are inclusive, collaborative, and innovative.

Values

Student Success

Every task we do, decision we make, and conversation we have should serve the ultimate goal of fostering student success. Faculty and staff are part of the solution to student success. Students succeed when they are given the tools, they need to feel confident on their own.

Cooperation

We are one team, and we pool our collective expertise and creativity to overcome challenges. Our team cooperates beyond CTL, recognizing our part in the larger community, and we encourage students, instructors, and staff to work toward common goals. We presume everyone is doing their best work and model the culture and behaviors we wish to see across UNM. If we don't understand someone's behavior, we ask them.

Growth

We are all learners, striving to grow as individuals, professionals, academics, and global citizens. Growth is not a linear process and involves taking risks. Mistakes are an opportunity for growth, allowing for us to build better and more responsive processes. We encourage instructors and students to embrace new educational practices and technologies. We incorporate research into everything we do and contribute to local, national, and international conversations.

Equity

We realize that the university was not designed for everyone, so we are committed to fostering and enacting inclusive pedagogies. We challenge preconceptions of strengths and weaknesses and educate ourselves on the root causes of educational inequity. We seek to identify and remove barriers to access.