CATME TUTORIAL FOR TEAM CREATION AND PEER EVALUATION

Compiled by Alexis Prybutok, Ph.D. (she/her)
Assistant Teaching Professor
Department of Chemical Engineering

TUTORIAL PURPOSE

This tutorial provides detailed instructions on how to use CATME to create Team-Maker and Peer Evaluation surveys, with specific settings approved by the UW Department of Chemical Engineering DEI Committee. This tutorial regularly references the CATME-provided video and text-based documentation provided by the creators/operators of CATME. This document is not made to replace all Q&A regarding these steps, but provide a quick guide on how to do these based on the pilot from Winter 2023 and includes key steps to help avoid bottlenecks. Below is a linked Table of Contents, where you can click on the section of interest and it will jump you down to that section.

If you have questions or need help with CATME usage in the UW ChemE Department, please email Alex Prybutok at prybutok@uw.edu.

Last update: Spring 2023
# TABLE OF CONTENTS

**CATME OVERVIEW** .......................................................................................................................... 3  
CATME Goals ........................................................................................................................................ 3  

**ACCOUNT CREATION** ...................................................................................................................... 3  
Requesting an Instructor Account ........................................................................................................ 3  
  *Video Tutorial* .................................................................................................................................... 3  
  *Step-by-Step Instructions* .................................................................................................................... 3  

**CREATING A CLASS** .......................................................................................................................... 5  
Creating a Class ....................................................................................................................................... 5  
  *Video Tutorial* .................................................................................................................................... 5  
  *Step-By-Step Instructions* .................................................................................................................... 5  

**TEAM-MAKER SURVEY CREATION & DEPLOYMENT** ................................................................. 7  
Basic Information about Team-Maker Surveys ....................................................................................... 7  
Custom Question Creation ....................................................................................................................... 7  
  *Custom Question 1: Pronouns* ............................................................................................................... 8  
  *Custom Question 2: Gender Identity Part 1* ......................................................................................... 9  
  *Custom Question 3: Gender Identity Part 2* ......................................................................................... 11  
  *Custom Question 4: Race/Ethnicity* .................................................................................................... 13  
Creating a Team-Maker Survey ............................................................................................................... 15  
  *Video Tutorial* .................................................................................................................................... 15  
  *Step-by-Step Instructions* .................................................................................................................... 15  
Deploying a Team-Maker Survey ............................................................................................................ 19  
Using the Team-Maker Survey to Form Teams ....................................................................................... 20  
  *Video Tutorial* .................................................................................................................................... 20  
  *Step-by-Step Instructions* .................................................................................................................... 20  

**PEER EVALUATION SURVEY CREATION & DEPLOYMENT** ....................................................... 25  
Basic Information about Peer Evaluation Surveys .................................................................................. 25  
Creating a Peer Evaluation Survey ......................................................................................................... 25  
  *Video Tutorial* .................................................................................................................................... 25  
  *Step-by-Step Instructions* .................................................................................................................... 26  
Deploying a Peer Evaluation Survey ....................................................................................................... 29  
Looking at the Results of a Peer Evaluation Survey ................................................................................ 30
CATME OVERVIEW

CATME Goals

Please watch the following videos made by the CATME team to explain what CATME is and what its overall goals are:

- What is CATME? (3 min)
- CATME Overview (1 min)

They have also conveniently supplied us with the following resources:

- CATME Terms Instructor Dictionary
- Instructor Videos (of which I will periodically reference specific ones of interest/use)
- CATME Step-by-Step Guide (where the one provided here is more specific to our usage and customization)

ACCOUNT CREATION

Requesting an Instructor Account

Video Tutorial

CATME has done a great job of compiling video tutorials on this process. The overall process for instructor account creation is described here:

- Creating and Accessing an Instructor Account (4.5 min)
- Instructor Account Process and Basics (2 min)

The specific information we will input is listed below in the next step.

Step-by-Step Instructions

1. Navigate to [https://www.catme.org/](https://www.catme.org/)
2. Click “Request an Instructor Account” (I believe it will take you to this form: https://www.catme.org/login/request)
3. Fill out the form with your UW email.
4. When asked to provide a Billing Contact, you should be able to select my name, as I’ve previously filled this out before. But if you can’t, please enter the following information:

Name: [your name]
Institution: University of Washington
Department: Chemical Engineering
Address: 3781 Okanogan LN
Address2: 105 Benson Hall
City: Seattle
Region/State: WA
Postal/Zip: 98195
Email: cefiscal@uw.edu
Phone: 205-543-2250
CREATING A CLASS

Creating a Class

Video Tutorial

The following CATME tutorial video shows a great overview of this process:

[How to Add a Class](#) (2 min)

Step-By-Step Instructions

You’ll need to do this process every time you have a new course you want to use CATME for.

**Note:** While you can create a single course per course that you plan to use CATME for, it is imperative that you create a separate activity (survey) for every separate section of your course. This will ensure that teams are section specific. Instructions and notes on this are included in the sections on survey creation.

1. Log into your instructor account
2. Upon Logging in you should see a page that looks like this that shows your Quick Summary of classes you have, activities within those classes, start and end dates for each activity, and the percentage of students that have completed each activity.
3. Click the “Create Class” button in the upper right corner of the screen. Classes are functionally folders that will hold all the separate activities per a given

4. Specify the class name, term, type, institution, and time zone. Some of this information may be pre-filled based on your profile.

5. On the “Rater Practice” screen, you can leave the default of “No Practice” for now.

6. On the “Extra Messages” screen, keep the button at the bottom checked. This won’t affect Team-Maker surveys, but will be good to have for Peer Evaluation.
TEAM-MAKER SURVEY CREATION & DEPLOYMENT

Basic Information about Team-Maker Surveys

CATME’s high-level information about the Team-Maker surveys can be found here:

[Team-Maker]

These Team-Maker surveys exists so to make teams in cooperative learning environments, commonly lab or project-based courses, using evidence-based practices.

Custom Question Creation

Before we make teams, there are a few custom questions we need. Specifically, the gender identity (“Sex”) and racial/ethnic identity (“Race”) questions that are the default in CATME are pretty limiting and lack sufficient options to be inclusive (disappointing, I know).

Thus, we will create 4 custom questions to help rectify this. I will walk you through the exact settings and questions I made, which were approved by the UW ChemE DEI Committee. I’ll start by outlining the process to create any custom question, then I’ll outline the specific information you’ll need for the questions I created. Some general documentation from CATME about this can be found [here](#), but I’ll walk you through the steps for our department’s specifically approved questions below.

1. First, go to your Quick Summary page.
2. Click “Question Manager” in the upper right corner
3. This will bring you a screen with all of the question options you have when creating a Team-Maker survey and the order they will appear. Questions labeled as “System” are CATME generated, while those labeled as “Personal” are custom questions.
4. Click the “Add Question” button in the upper right corner.

5. Click “Next” on the Welcome Page. (Stop here and see below if you’re here to create the 4 custom questions approved by the DEI department)

6. Fill out the Basic Question Information including a shorthand title, the specific text you want to appear as the question prompt, and the type of question (i.e. numeric, multiple choice, etc).

7. Provide a list of possible answers to your question. This will be based on what you list above.

Let’s now focus on the specific questions I created. The next few steps will assume you did steps 1-5 above, and will tell you what to fill out on each page for each of the 4 custom questions.

**Custom Question 1: Pronouns**

1. On the “Basic Question Information” page, please fill out the following information:

   Title: Pronouns
   Question: What are your pronouns? This is for my own reference to ensure I get this right! :)  
   Type: Multiple Choice, Choose Multiple, Freetext Option

   Click “Next” when you’re done.

2. On the “Answers” page, please type in the following answers:

<table>
<thead>
<tr>
<th>Display Text</th>
<th>Stored As</th>
</tr>
</thead>
<tbody>
<tr>
<td>she/her</td>
<td>she/her</td>
</tr>
<tr>
<td>he/him</td>
<td>he/him</td>
</tr>
<tr>
<td>she/they</td>
<td>she/they</td>
</tr>
<tr>
<td>he/they</td>
<td>he/they</td>
</tr>
<tr>
<td>they/them</td>
<td>they/then</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>Prefer not to say</td>
</tr>
<tr>
<td>Prefer to self describe</td>
<td>Prefer to self describe</td>
</tr>
</tbody>
</table>

   Click “Next” when you’re done.

3. When you’re back on the Question Manager page, find your “Pronouns” question (it will likely appear at the bottom) and drag it up to order 8.
Custom Question 2: Gender Identity Part 1

1. On the “Basic Question Information” page, please fill out the following information:

   Title: Gender Identity Part 1
   Question: Which of the following gender identities (if any) do you identify with (select all that apply)?
   Type: Multiple Choice, Choose Multiple, Freetext Option

   Click “Next” when you’re done.

2. On the “Answers” page, please type in the following answers (these are in alphabetical order); you may need to add “More Answers” to enable adding more options:

<table>
<thead>
<tr>
<th>Display Text</th>
<th>Stored As</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agender</td>
<td>Agender</td>
</tr>
<tr>
<td>Genderfluid</td>
<td>Genderfluid</td>
</tr>
<tr>
<td>Gender non-conforming</td>
<td>Gender non-conforming</td>
</tr>
<tr>
<td>Genderqueer</td>
<td>Genderqueer</td>
</tr>
<tr>
<td>Intersex</td>
<td>Intersex</td>
</tr>
<tr>
<td>Man</td>
<td>Man</td>
</tr>
<tr>
<td>Nonbinary</td>
<td>Nonbinary</td>
</tr>
<tr>
<td>Questioning</td>
<td>Questioning</td>
</tr>
<tr>
<td>Two-spirit</td>
<td>Two-spirit</td>
</tr>
<tr>
<td>Woman</td>
<td>Woman</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>Prefer not to say</td>
</tr>
<tr>
<td>Prefer to self describe/Other</td>
<td>Prefer to self describe/Other</td>
</tr>
</tbody>
</table>

   Click “Next” when you’re done.

3. When you’re back on the Question Manager page, find your “Gender Identity Pt 1” question (it will likely appear at the bottom) and drag it up to order 9.

4. Click on your “Gender Identity Pt 1” question in the list.

5. You’ll be taken to the following page. Click on “Advanced Settings” at the top.
6. You’ll be taken the “Advanced Question Settings” page. Your page won’t match mine (yet) but it looks something like this.

### Advanced Question Settings

**Student Surveys**
- Student: “must answer” the question
- Survey answers: “display in a dropdown list”

**Instructor Results**
- Weight range: “-5” to “5”
- Default weight: “0”
- Scoring labels: “Distribute vs. Don’t Outnumber”
- Results shown: “using answers’ storage values”
- Answers listed: “in question order”
- Leave append gender to answers unchecked

**Loading Data**
- Leave this one as is

**Minority- and Gender-related**
- Majority weighting: “on” (select radio button)
- Majority answer: “Man”
- Segments other minority groups box should be checked.

7. Change all the following settings to match mine by editing the following below:

**Student Surveys**
- Student: “must answer” the question
- Survey answers: “display in a dropdown list”

**Instructor Results**
- Weight range: “-5” to “5”
- Default weight: “0”
- Scoring labels: “Distribute vs. Don’t Outnumber”
- Results shown: “using answers’ storage values”
- Answers listed: “in question order”
- Leave append gender to answers unchecked

**Loading Data**
- Leave this one as is

**Minority- and Gender-related**
- Majority weighting: “on” (select radio button)
- Majority answer: “Man”
- Segments other minority groups box should be checked.

8. Save these settings. It won’t let you edit these once these questions are in use. So please be sure to get this correct now.
Custom Question 3: Gender Identity Part 2

1. On the “Basic Question Information” page, please fill out the following information:

   Title: Gender Identity Part 2
   Question: What adjective would you use to describe your gender identity (if any)? Please select all that apply.
   Type: Multiple Choice, Choose Multiple, Freetext Option

   Click “Next” when you’re done.

2. On the “Answers” page, please type in the following answers (these are in alphabetical order); you may need to add “More Answers” to enable adding more options:

<table>
<thead>
<tr>
<th>Display Text</th>
<th>Stored As</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cis</td>
<td>Cis</td>
</tr>
<tr>
<td>Gender non-conforming</td>
<td>Gender non-conforming</td>
</tr>
<tr>
<td>Trans</td>
<td>Trans</td>
</tr>
<tr>
<td>Two-spirit</td>
<td>Two-spirit</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>Prefer not to say</td>
</tr>
<tr>
<td>Prefer to self describe/Other</td>
<td>Prefer to self describe/Other</td>
</tr>
</tbody>
</table>

   Click “Next” when you’re done.

3. When you’re back on the Question Manager page, find your “Gender Identity Pt 2” question (it will likely appear at the bottom) and drag it up to order 10.

4. Click on your “Gender Identity Pt 2” question in the list.

5. You’ll be taken to the following page. Click on “Advanced Settings” at the top.
6. You’ll be taken the “Advanced Question Settings” page. Your page won’t match mine (yet) but it looks something like this.

Advanced Question Settings

Student Surveys

Student: "must answer" the question
Survey answers: "display in a dropdown list"

Instructor Results

Weight range: "-5" to "5"
Default weight: "0"
Scoring labels: "Distribute vs. Don’t Outnumber"
Results shown: "using answers’ storage values"
Answers listed: "in question order"
Leave append gender to answers unchecked

Loading data

Use column name: to load from spreadsheet!

Minority- and Gender-related

Majority weighting: "on" (select radio button)
Majority answer: "Cis"
Segments other minority groups box should be unchecked.

7. Change all the following settings to match mine by editing the following below:

Student Surveys

Student: "must answer" the question
Survey answers: "display in a dropdown list"

Instructor Results

Weight range: "-5" to "5"
Default weight: "0"
Scoring labels: "Distribute vs. Don’t Outnumber"
Results shown: "using answers’ storage values"
Answers listed: "in question order"
Leave append gender to answers unchecked

Loading Data

Leave this one as is

Minority- and Gender-related

Majority weighting: "on" (select radio button)
Majority answer: "Cis"
Segments other minority groups box should be unchecked.

8. Save these settings. It won’t let you edit these once these questions are in use. So please be sure to get this correct now.
**Custom Question 4: Race/Ethnicity**

1. On the “Basic Question Information” page, please fill out the following information:

   - **Title:** Race/Ethnicity
   - **Question:** Which of the following racial and ethnic identities (if any) do you identify with (check all that apply)?
   - **Type:** Multiple Choice, Choose Multiple, Freetext Option

   Click “Next” when you’re done.

2. On the “Answers” page, please type in the following answers (these are in alphabetical order); you may need to add “More Answers” to enable adding more options:

<table>
<thead>
<tr>
<th>Display Text</th>
<th>Stored As</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian</td>
<td>Asian</td>
</tr>
<tr>
<td>Black, African, or African American</td>
<td>Black/African/AfricanAmerican</td>
</tr>
<tr>
<td>First Nation, Indigenous, Alaska Native</td>
<td>FirstNation/Indigenous/Alaska</td>
</tr>
<tr>
<td>Latina/o/x</td>
<td>Latina/o/x</td>
</tr>
<tr>
<td>Hawaiian/Pacific Islander</td>
<td>Hawaiian/Pacific Islander</td>
</tr>
<tr>
<td>Middle Eastern</td>
<td>Middle Eastern</td>
</tr>
<tr>
<td>White or Caucasian</td>
<td>White/Caucasian</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>Prefer not to say</td>
</tr>
<tr>
<td>Other</td>
<td>Other</td>
</tr>
</tbody>
</table>

Click “Next” when you’re done.

3. When you’re back on the Question Manager page, find your “Race/Ethnicity” question (it will likely appear at the bottom) and drag it up to order 12.

4. Click on your “Race/Ethnicity” question in the list.

5. You’ll be taken to the following page. Click on “Advanced Settings” at the top.

---

**Question Editor**

**Title:** Race/Ethnicity

**Question:** Which of the following racial and ethnic identities (if any) do you identify with (check all that apply)?

**Type:** Multiple Choice, Choose Multiple, Freetext Option

**Answers**

<table>
<thead>
<tr>
<th>Display Text</th>
<th>Stored As</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian</td>
<td>Asian</td>
</tr>
<tr>
<td>Black, African, or African American</td>
<td>Black/African/AfricanAmerican</td>
</tr>
<tr>
<td>First Nation, Indigenous, Alaska Native</td>
<td>FirstNation/Indigenous/Alaska</td>
</tr>
<tr>
<td>Latina/o/x</td>
<td>Latina/o/x</td>
</tr>
<tr>
<td>Hawaiian/Pacific Islander</td>
<td>Hawaiian/Pacific Islander</td>
</tr>
<tr>
<td>Middle Eastern</td>
<td>Middle Eastern</td>
</tr>
<tr>
<td>White or Caucasian</td>
<td>White/Caucasian</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>Prefer not to say</td>
</tr>
<tr>
<td>Other</td>
<td>Other</td>
</tr>
</tbody>
</table>

---

13
6. You’ll be taken the “Advanced Question Settings” page. Your page won’t match mine (yet) but it looks something like this.

**Advanced Question Settings**

**Student Surveys**
- Student: “must answer” the question
- Survey answers: “display in a dropdown list”

**Instructor Results**
- Weight range: “-5” to “5”
- Default weight: “0”
- Scoring labels: “Distribute vs. Don’t Outnumber”
- Results shown: “using answers’ storage values”
- Answers listed: “in question order”
- Leave append gender to answers unchecked

**Loading data**
- Use column name: to load from spreadsheet

**Minority- and Gender-related**
- Minority weighting: “on” (select radio button)
- Majority answer: “White/Caucasian”
- Segments other minority groups box should be unchecked.

7. Change all the following settings to match mine by editing the following below:

**Student Surveys**
- Student: “must answer” the question
- Survey answers: “display in a dropdown list”

**Instructor Results**
- Weight range: “-5” to “5”
- Default weight: “0”
- Scoring labels: “Distribute vs. Don’t Outnumber”
- Results shown: “using answers’ storage values”
- Answers listed: “in question order”
- Leave append gender to answers unchecked

**Loading Data**
- Leave this one as is

**Minority- and Gender-related**
- Majority weighting: “on” (select radio button)
- Majority answer: “White/Caucasian”
- Segments other minority groups box should be unchecked.

8. Save these settings. It won’t let you edit these once these questions are in use. So please be sure to get this correct now.
Creating a Team-Maker Survey

Next, we will be creating a Team-Maker survey using both CATME-made questions and the custom ones we just made.

Video Tutorial

CATME has made a video tutorial describing this process.

Creating a Team-Maker Survey (4 min)

I'll walk you through the specifics in setting it up with our Custom Questions.

Step-by-Step Instructions

**Note:** It is imperative that you do these steps for every separate section of your course. This will ensure that teams are only made with students in the same section.

1. Download or create a .csv file with the following columns headers and subsequent information for each student: "Last", "First", "ID", "Email". It’s important that the files have these specific headers so CATME can recognize them and populate things correctly internally, and that the email included is their UW email. You will need one file per course section. You can get these from [https://my.uw.edu/](https://my.uw.edu/).

   If you don’t have multiple sections:

   Simply click the “[# students] of [# seats]” on the right associated with your course section and click on “Download (CSV)”.
Remove any columns that are not needed
Edit the column titles to match what is listed above and needed for CATME

If you have multiple sections:

Click on “Linked Sections” below the course information.

For each section:

Click the “[# students] of [# seats]” on the right associated the section

Click on “Download (CSV)”

Remove any columns that are not needed
Edit the column titles to match what is listed above and needed for CATME
Do this for each section!

2. Back in CATME, Click on your course on the right under “Class”.

3. This will bring you to the Class Editor page. Click “Add Activity”.

4. Read the instructions and Press “Next”.

5. On the “Pick Activity Type” page, select the “Team-Maker” option.

6. On the “Basic Activity Information” page, give your activity a name (I suggest one that indicates which section is this survey is for, if you have multiple sections. You can see above that I did this with letters A-D). Then select a start and end date. The start date is when students will be automatically set the email from CATME prompting them to fill out the survey. The end date is the last day they can complete the survey (by midnight that day)—so make this at least 24 hours before you want to finalize the teams. For “Rater Practice”, leave the default of “No Practice”. You can edit these dates at any time.
7. On the “Activity Content” page is where you’ll select which questions (both custom and default) you want to include on the survey. Please make sure at least the first 5 of following questions are checked (the first 4 are our custom questions, the others are CATME made), but I used all of these for the lab course. Some of these may not apply to you.

- Pronouns
- Gender Identity Pt 1
- Gender Identity Pt 2
- Race/Ethnicity
- Schedule (availability to ensure team can meet)
- Weekend Meetings (whether they prefer/are able to meet on weekends to work)
- Writing Skills (self-reported skills on writing, good for report-based courses)
- Commitment Level (amount of time willing to put into course)
- Leadership Role (preferred leadership/follower role or in between)

A summary/description of the CATME-made Team-Maker survey questions can be found here (you can access the second one, which is more informative, by clicking on the “Information on Team-Maker Questions section” button within the page you’re on; it will open this in a new page).

**Team-Maker Questions** – shows you how questions are phrased to students

**Faculty Help: Information on Team-Maker Questions** – shows questions and all answer options and below that is information about the algorithm detail and how team scores are calculated as well as scoring for individual questions.

8. On the “Students” page, upload the csv file you made in Step 1 associated with only the specific section of the course you’re making the survey for (or the csv file containing all students if you don’t have multiple sections). If you don’t have this now, you can do it later in the activity editor.

9. Next is instructor delegation. You can hit “Next” without doing anything, as given the nature of the demographic information, we do not give TAs access to CATME. However, in the future, we may wind up adding Nicole Minkoff as an instructor to all courses so she can oversee CATME usage on behalf of the DEI Committee.

10. Click the “Done” button.

11. You can click on the activity itself in your Quick Summary page to see the Activity Editor page and edit the questions selected and start/end dates. Here you should set the “Schedule Grid Size” to the “14 Hour Grid (8AM – 9PM)” as to not encourage students to be working in the middle of the night.

12. If you make any changes, be sure to press “Save”.

13. The video tutorial linked above in this section shows what to do if students are added to the course, drop from it, or do not complete activities on time.
Deploying a Team-Maker Survey

1. CATME will automatically deploy the survey and send students an email prompting them to fill it out on the date you've selected at your start date.
2. Before having students fill out the survey, I recommend either sending them a message so they know to expect it or discussing this in class.
3. At the end of the survey, there is always a place for students to leave instructor comments. Students often use this to leave information about any concerns they have, or students they want or don’t want to work with. I have drafted some recommended language that I would send out in a message to students both about the survey and on guiding them on how on to use this box:

CATME is a Purdue-operated site/algorithm that was created by those doing research in engineering education. It is designed to create engineering class teams using evidence-based practices, and we will also be using it for peer feedback later in the quarter. The department has begun using this technology across many of its courses given our interest in evidence-based practices and success with its use last quarter when it was piloted by department faculty alongside the DEI Committee. This software's ability to make teams efficiently and with best practices in mind will hopefully help you get the most of this course and your team experience and to minimize potential conflict due to differences in schedule or work-time preference. The teams will be formed with the goal of optimizing inclusion, academic success, and schedule compatibility. If you have any questions about how the software works, I’d be happy to discuss that at any time.

All of your responses will remain confidential and in the hands of me and Nicole and she will be supervising/helping me use the software. If there are identity-based questions you don’t feel comfortable answering, you are welcome to select "Prefer not to say" and you will not be penalized in any way.

A few notes when filling it out:

- Please fill it out honestly. We cannot make good teams unless you do this.
- When filling out your schedule, please be as open as possible about your working times. Also please do not try to "game the system" by filling out the exact same, very narrow schedule as your friends.
- The last question, which will appear after the main questions on the first page, is an open-ended question where you can tell me (the instructor) any other information I need to support you during the quarter. This can include any advice, advocacy, supports I can provide/needs I can help with, known travel times/if you’ll be gone frequently (such as for grad school visits), existing interpersonal dynamics that I should be aware of when making teams, etc. You’ll have a 5000 character limited box to put anything you’d like in response, but please keep the information above in mind.
Using the Team-Maker Survey to Form Teams

Video Tutorial

CATME provided a video that serves as a great overview for the process of making teams.

**Making Teams (3 min)**

In the steps below, I will show you the specific steps necessary to make teams using the DEI Committee-approved settings with race and gender identity.

**Step-by-Step Instructions**

1. When the end date for the Team-Maker survey has passed, you’ll see an extra bar in your Quick Summary page prompting you to define teams. Click on the red text to begin the process.

2. The results page will show you a table with each student who completed the survey and their answers to each question. (Shown below is from the linked video and not my students to protect their information). Click Make Teams in the upper right-hand corner.
3. This will take you to the page where we will define parameters for each question to make the teams. First, you need to set the team size. This will be dependent on your specific course. Teams of ~3-4 are ideal, I would not recommend more than 5.

4. For the custom questions, use the following options as a starting point:

**Pronouns**

- **Group Dissimilar**
- **Ignore**
- **Group Similar**

**Gender Identity Pt 1**

- **Distribute**
- **Ignore**
- **Don't Outnumber**

**Gender Identity Pt 2**

- **Distribute**
- **Ignore**
- **Don't Outnumber**

**Race/Ethnicity**

- **Distribute**
- **Ignore**
- **Don't Outnumber**

The goal with these questions is to optimize inclusion, access, contributions, and team success. That means ensuring that students holding minority identities are not alone on a team with majority identity only students, as this opens doors for feelings of isolation, discrimination, or even just not feeling as heard or seen. See below for a description of each category and explanation of what our goals are here, and how you may need to edit settings to achieve those goals.
Pronouns:

Ignore – this is just to ensure you use the right pronouns for each student

Gender Identity Pt 1 (Man, Woman, Gender non-conforming, Gender Queer, etc):

Set this to the radio dial 2 up from ignore in the “Don’t Outnumber” direction.

The goal is to ensure that women, gender non-conforming, and gender queer men are not alone on a team with all men. CATME does try to group people by similarity, so for example if you have two gender non-conforming students, it will try to put the two students with that specific identity together rather than just ensuring they are on a team with at least one other woman, gender non-conforming, or genderqueer students. Your goal is only really the latter, rather than the former, so you may end up needing to intentionally separate students if it tries to make 1 team of all the students who identify as gender non-conforming. Nicole can help you decide when this is appropriate.

Gender Identity Pt 2 (Cis, Trans, Gender non-conforming, etc):

Set this to the radio dial 1 up from ignore in the “Don’t Outnumber” direction.

The goal is to ensure that trans and gender non-conforming students are not alone on a team with all cis students, if possible. However, in the event that there are too few students to group by this, it will be okay to click “ignore” for this category. Nicole can help you decide when this is appropriate.

Race/Ethnicity (Asian, White, Black, Latina/o/x, etc.):

Set this to the radio dial 2 up from ignore in the “Don’t Outnumber” direction.

The goal is to ensure that no minority identifying students, students of color, or URM students are alone on a team with all white students. CATME will unfortunately try to group students with similar identities together, which is not our goal. So, for example, if you have only two students in one category (ex: Asian), it will by default try to put them together. This is why we have this only at radio dial +2, and you may need so you may end up needing to intentionally separate students if it tries to make 1 team of all the students who identify as a specific identity (but please make sure they are not the only minority student on that team). Nicole can help you decide when this is appropriate. Largely, our student body is very diverse and this hasn’t been a common issue except with some of the least represented identities (ex: Black students). While it’s important to make sure students are not alone, you also don’t want to be segregating students fully by race. This is why this balance is important.
5. For the other questions you chose, it’s totally fine to stick with the CATME defaults. The thing of highest priority will likely be their schedule.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>Usually radio dial +4 or 5 to “Group Similar” to ensure teams can meet</td>
</tr>
<tr>
<td>Weekend Meetings</td>
<td>Usually around radio dial +2 to “Group Similar” to ensure their meeting time preferences are aligned</td>
</tr>
<tr>
<td>Commitment Level</td>
<td>Usually around radio dial +2 to “Group Similar” to ensure students on a team are all willing to put similar effort into the course so that there isn’t conflict over this/grades as much</td>
</tr>
<tr>
<td>Leadership Role</td>
<td>Usually around radio dial -2 to “Group Dissimilar” to ensure prevent teams from having conflict over having all leaders or all followers. However, I recommend instituting roles so that everybody has to lead at some point—it’s good practice.</td>
</tr>
<tr>
<td>Leadership Preference</td>
<td>Usually around radio dial -1 to “Group Dissimilar” (similar to above)</td>
</tr>
</tbody>
</table>

6. Once you have all of these set (and you can adjust them after each iteration as needed), select “Make New Teams” in the upper right.

7. CATME will run through 20 iterations to find the best teams. The algorithm is pretty fast, so this can be redone several times very easily.
8. When teams are created, you’ll see a table where each team lists the students in them, and their scores in each category. A high score means they are more similar in a given category, while a negative score means they’re more diverse. You want to make sure the teams fit the demographic safety information described in the previous step, and you want the team score to be high (ideally 4-5) for their schedules.

9. If needed, you can “Change Params” to change the settings above and remake the teams, or you can select specific settings and remake teams (make sure “Enable page controls” is selected), such as the following:

Make team with only selected students

This will enable you to mark the box next to individual students and make a team with only these students on it. This will override the team size button.

Put selected students on the same team

This will enable you to mark the box next to individual students and ties them together when forming teams; other students may still be added to this team. This option will still adhere to the team size limits, and fill in students if needed or display an error if you are above the limit.

Separate selected students

This will enable you to mark the box next to individual students and make sure they do not end up on a team together. This can be useful if students indicate a prior conflict with another student, or if you want to separate students who have worked together in the past (especially if you know they did not get along). Nicole may also know of other student interpersonal dynamics that can help guide this.

Separate members of all current teams

This will separate students on all teams and create different teams.

10. Once you’re happy with the teams, click “Save Teams”.
11. You can adjust the team names if needed.
12. On the “Release Results” page, under “Release team assignments to:” select “Students”. Releasing the team information will send students information about their team, including group members and the schedule with all of their availability listed on the grid so they can best coordinate.
Basic Information about Peer Evaluation Surveys

CATME’s high-level information about the Team-Maker surveys can be found here:

Peer Evaluation

These Peer Evaluation surveys will ask students to assess themselves and their teammates on each of 5 behavior-based dimensions—Contributing to the Team’s Work, Interacting with Teammates, Keeping the Team on Track, Expecting Quality, Having Relevant KSAs (Knowledge, Skills, and Abilities)—as well as on overall team assessments. Please read the document above for a really good overview of these surveys.

Additional documentation on the CATME Five Teamwork Dimensions can be found here:

CATME Five Teamwork Dimensions

This document outlines the definition of each dimension and the behaviors associated with ratings of 1-5 in each category. The bottom of that document contains a useful handout outlining these as well that you can give to students.

There are additional team attributes you can ask students to rate the team on. All of the information about those questions can be found here:

Extra Questions

Below I’ll outline the steps for creating surveys and tell you which survey items I used and language I gave to students about these surveys.

Note: I highly recommend not simply giving students this Peer Evaluation survey in a vacuum, but rather having them also have a follow-up activity in class where they talk through the evaluations/comments they gave each other and think about how to address them/grow from them both as individuals and as a team. I also suggest doing this survey at both the mid and end points of the course.

Creating a Peer Evaluation Survey

Next, we will be creating a Peer Evaluation survey using both the questions about the 5 dimensions as well as other useful questions to assess team function.

Video Tutorial

CATME has made a video tutorial describing this process.

Creating a Peer Evaluation Survey (3 min)

I’ll walk you through the specifics in setting it up with the questions I used as well as information I gave to students.
Step-by-Step Instructions

Note: It is imperative that you do these steps for every separate section of your course. This will ensure you can import section-specific teams.

1. Click on your course on the right under “Class”.

2. This will bring you to the Class Editor page. Click “Add Activity”.

3. Read the instructions and Press “Next”.
4. On the “Pick Activity Type” page, select the “CATME BARS [PEER EVALUATION]” option.
5. On the “Basic Activity Information” page, give your activity a name (I suggest one that indicates which section is this survey is for, if you have multiple sections. You can see above that I did this with letters A-D). Then select a start and end date. The start date is when students will be automatically set the email from CATME prompting them to fill out the survey. The end date is the last day they can complete the survey (by midnight that day). I recommend making the release date the day you plan to have an activity surrounding these peer evaluations in class, as the information goes out basically as soon as you release it, which you can do after the end date. You can edit these dates at any time.

If this is your first round of peer evaluations (such as at the course midpoint):

   For “Rater Practice” select “Require Once”.

   This will ask students to rate hypothetical teammates with described qualities so they get an understanding of the CATME rating system.

   You can find more information about this here:

   Rater Practice: Providing Feedback for Evaluations
   Rater Practice Demonstration (2.5 min)

If this is your second+ round of peer evaluations (such as at the course end point):

   For “Rater Practice” select “No Practice”.

6. On the “Activity Content” page is where you’ll select which questions you want to include on the survey. I used the following.

   Contributing to Work
   Interacting with Teammates
   Keeping Team on Track
   Expecting Quality
   Having Knowledge/Skills
   Team Conflict
   Team Satisfaction
   Psychological Safety

   Please see the Basic Information about Peer Surveys section above to learn more about these questions. There are many options to choose from!
7. On the “Peer-to-Peer Comments” page, make sure the following settings are selected:

- Enable Peer-to-Peer comments: (checked)
- Release Peer-to-Peer comments: (checked)
- Anonymous Peer-to-Peer Release: (unchecked)

This video explains why it’s important to use Peer-to-Peer comments in surveys:

**Why Use Peer-to-Peer Comments?** (3.5 min)

I believe it’s important to let students see the feedback from their peers, and making it non-anonymous encourages students to be 1) respectful and 2) explain their feedback.

It is also highly important to explain to students that comments will not be anonymous. I will provide some language surrounding this in the section about deploying the survey.

Separately, there are comments to instructors which are not anonymous but only go to the instructor and are not seen by the rest of the team.

8. On the “Load Students” page, you can “Import Students from an Activity”, and import them directly with their associated team information from your Team-Maker survey associated with that specific section.

14. Next is instructor delegation. You can hit “Next” without doing anything, as given the nature of the demographic information, we do not give TAs access to CATME. However, in the future, we may wind up adding Nicole Minkoff as an instructor to all courses so she can oversee CATME usage on behalf of the DEI Committee.

15. The next page details your licensing information.

16. Click the “Done” button.

17. You can click on the activity itself in your Quick Summary page to see the Activity Editor page and edit the questions selected and start/end dates. Here you can make changes as needed and see the students, and preview the survey as a student if you wish.

18. If you make any changes, be sure to press “Save”.
Deploying a Peer Evaluation Survey

1. CATME will automatically deploy the survey and send students an email prompting them to fill it out on the date you’ve selected at your start date.
2. Before having students fill out the survey, I recommend either sending them a message so they know to expect it or discussing this in class. I also recommend having them read a little bit about CATME and providing specific guidelines on how to use the peer-to-peer comments. Here is an example of my guidelines below:

The following information is to acquaint you with CATME’s Peer Evaluation process and categories.

Please look at the following CATME Peer Evaluation instructions.

Please also watch the following very short YouTube Videos about each component of the CATME Peer Review that you’ll be asked to do for this assignment.

CATME Rater Practice (2.5 min)
CATME Five Teamwork Dimensions (document + 5 short videos embedded)
CATME Peer-to-Peer Comments (2 min)

Please fill out the CATME survey emailed to you via CATME. You’ll be asked to complete one Rater Practice attempt before completing the survey on your real teammates. When you complete the real survey, you’ll be asked about the following categories:

- For each teammate:
  - Five Teamwork Dimensions
    - Contributing to Work
    - Interacting with Teammates
    - Keeping Team on Track
    - Expecting Quality
    - Having Knowledge/Skills
  - Peer-to-Peer Comments
- For the team overall:
  - Team Conflict
  - Team Satisfaction
  - Psychological Safety

I suspect this activity will take about an hour in total. Please do it thoughtfully.

The peer-to-peer comments for each student will be provided to them directly, and these will not be anonymous.

For this question, please answer do the following: You MUST list at least 3 strengths and 3 areas for growth for each person. Please number each under each category (ex: “Strengths: 1) xxx, 2) xxx, 3) xxx. Areas of Improvement: 1) xxx 2) xxx, 3) xxx”).

When doing this, please 1) be kind, honest, and respectful, but constructive in your words and comments and 2) direct the language to them, not me (i.e., "you are a great asset to
the team” vs “they are a great asset to the team”). Remember, only write down things in a way that you would phrase it directly to them, as you’ll be openly discussing these comments in class for the in-class assignment and they’ll receive them directly through CATME. This doesn’t mean you can’t comment on room for improvement (in fact, you’re required by me to list at least 3 strengths and 3 areas of improvement for each person as per the assignment guidelines in the document above), it just means you need to do so kindly and respectfully. If you do not follow these rules, you will lose points for the activity.

You all are wonderful and have great qualities that you bring to your teams, but you are also all learning and, just like all humans, have things that can still be improved. Some areas to possibly reflect on for each team member might include: attitude/effect on team morale, effort level, precision, dedication, clarity, communication, response quality and/or timing, initiative taking, quality of work, technical knowledge, writing skills, oral presentation skills, sharing of the workload, efficiency, timing of starting/finishing work, taking responsibility for mistakes, ability to take feedback, independence, and surely many more possible things! Remember, nobody is perfect and we are all growing, and similarly you all bring great things to the table!

You will not be allowed re-entry into the CATME survey, so 1) it might be useful to you to take a screenshot of the comments you wrote for each team member if this will help you during the discussion in class, and 2) you will not get a chance to edit these answers so please make sure you follow directions.

3. When students have completed the survey and the end date has passed, you can release the data to students from the Quick Summary page. I recommend doing this about an hour or so before class.

Looking at the Results of a Peer Evaluation Survey

1. You can look at the data for a given section by clicking on the “View Results” button at the top of the page (both before and after you release the data, and while they’re completing the survey).

2. The Activity Results page looks as follows:
From here you can “View Comments”, or see “Dashboard-Raw Data Detail” or “Dashboard-Detailed Data by Team”.

3. This Activity Results page will show the following:

   Members for each team
   Average rating in each of the 5 dimensions for each team member
   Adjustment factors both with and without self
   Notes

For scores, in all cases, high scores are better.

The adjustment factor with and without self are sometimes used by instructors to adjust grades to compensate for some people putting in more effort. I personally do not do this. I grade based on whether or not the teammates agreed that there was an honest attempt to address feedback from the first round by the end of the quarter.

The “Notes” section will indicate exceptional conditions within the team when indicated based on the algorithm. This can include the following:

“Conflict” – a student who may have specific conflict with others (ex "student x marked student y really low but nobody else did")

“Clique” – a team has subdivided into cliques

“High” – students who got a significantly higher rating than the average rating of the team

“Low” – students who got a significantly lower rating than the average rating of the team

“Over” – Overconfident (ex "student x marked themselves significantly higher than the rest of their team marked them")

“Under” Underconfident (ex "student x marked themselves significantly lower than the rest of their team marked them" meaning they’re underselling themselves or maybe don’t quite see their own value even when others do).

An example of this is shown below.
When certain notes are found (ex: “Conflict” or “Clique”), the Adjustment Factor areas will be purple as they may no longer be reliable.

<table>
<thead>
<tr>
<th>Adj Factor (w/ Self)</th>
<th>Adj Factor (w/o Self)</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.05</td>
<td>1.05</td>
<td></td>
</tr>
<tr>
<td>1.00</td>
<td>1.01</td>
<td></td>
</tr>
<tr>
<td>1.00</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>1.01</td>
<td>1.05</td>
<td></td>
</tr>
<tr>
<td>1.00</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>0.85</td>
<td>0.83</td>
<td></td>
</tr>
<tr>
<td>1.05</td>
<td>1.05</td>
<td></td>
</tr>
<tr>
<td>1.05</td>
<td>1.05</td>
<td>High</td>
</tr>
<tr>
<td>0.88</td>
<td>0.86</td>
<td></td>
</tr>
<tr>
<td>1.05</td>
<td>1.06</td>
<td></td>
</tr>
<tr>
<td>0.87</td>
<td>0.86</td>
<td></td>
</tr>
<tr>
<td>1.05</td>
<td>1.05</td>
<td></td>
</tr>
<tr>
<td>1.05</td>
<td>1.05</td>
<td>Conf</td>
</tr>
<tr>
<td>0.90</td>
<td>0.85</td>
<td></td>
</tr>
<tr>
<td>1.05</td>
<td>1.05</td>
<td></td>
</tr>
</tbody>
</table>

When these notes are found, students will get a text box about it that appears at the top of their peer evaluation results screen. Only they can see this box (and their results, in general—the rest of the team cannot).

It’s worth noting that unfortunately CATME doesn’t take into account the average student’s rating when calculating “Under” and “Over” confident. For example, if Student A gives everybody on the team 3s-4s because their bar for a 5 is higher, but the rest of the team gives everybody 4s-5s, then Student A might be labeled as “Underconfident”, but in reality they valued themselves as much as they valued other teammates. Looking at the raw data can help parse this out. In theory, the rubric usage should help normalize everybody’s scores in general to some defined standards, but I found that this was a common reason for students being labeled as “Underconfident”.

It’s worth paying attention to the demographics of the students with these flagged exceptions to ensure that there is not discrimination or other issues.

4. On the “View Comments” page, you’ll see a table for each student with the comments they left for themselves and each of their teammates in it. This page also shows the “Comments to Instructor” at the top.

5. On the “Dashboard-Raw Data Detail” screen, you can see what each individual student marked as a response to each of the questions asked. It will also show all the information about the extra questions for each team member (such as for Team Satisfaction). This data is detailed specifically by each sub-question (each Extra Question category is actually 3-7 questions), and also shows mean and standard deviation across the team.

6. On the “Dashboard-Detailed Data by Team”, it will show how members of a team rated each other, and when team members (raters) did not discriminate ratings both across the team (ex: gave everybody a 4/5 for a given dimension) and across an individual (ex: gave one individual a 4/5 in every dimension). It will also show all the information about the extra questions for each team member (such as for Team Satisfaction). This data is detailed specifically by each sub-question (each Extra Question category is actually 3-7 questions), and also shows mean and standard deviation across the team.