

Work Session Summary — Rolling Document

AI Portfolio Coach Development

Dr. Alianna J. Maren & Claude (Anthropic)

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How to use this document: *This is a rolling summary, updated at the close of each work session. Section 1 (Current State) always reflects right now — read this first. Section 2 (Session Log) records what was decided and produced in each session, newest entry first. Upload the latest version of this document to the Claude Project at the start of each new session.*

1. Current State

Last updated: February 22, 2026 | End-of-afternoon session

1a. Repository — Complete Document Set

The following documents are in the AI Portfolio Coach Claude Project repository. All are available for upload to student Projects.

| Document | Purpose / Status |
|---|---|
| Claude_AI_Portfolio_Coach_Briefing_v1.2.docx | Primary briefing document for Claude. Orients Claude to its role, student profile, gated framework, capabilities/limitations, report structure, and first session protocol. NOTE: v1.3 is needed — see Outstanding Items below. |
| Meta_Document_Briefing_Guide_v1.docx | Context-independent guide for creating Briefing Documents in any new Claude Project context. |
| Project-Report-Template_2026-02-22.docx | Report Template with 'Use of AI in Developing This Work' section and Appendix B: Log of AI Interactions. |
| AI_Portfolio_Coach_About_Me.docx | Student-facing introduction to Claude in its AI Portfolio Coach role. |
| AI_Portfolio_Coach_How_To_Begin_v2.docx | Student instruction sheet for setting up the Claude Project and opening the first session. |
| TC-001_TitlePage_YouTube_Summary.docx | First Themesis Content Archive entry. Covers Title Page YouTube. Provides Gate 2 (Title Page Review) criteria for Claude. |

| Document | Purpose / Status |
|--|--|
| StyleChecklist_Gate1_2026-02-22.docx | Student-facing Gate 1 checklist. Seven items: column format, font type, font size, page numbering (×3), orphaned headers. Includes Google Docs warning box between SC-3 and SC-4. Includes Canvas confirmation statement. COMPLETE — deployed to students. |
| Gate1_FacilitatorNotes_Claude_2026-02-22.docx | Claude's operational guide for running Gate 1 sessions. 8-step sequence, 4 edge cases, tone and pacing notes. Includes explicit upload process instructions for students new to Claude Projects. COMPLETE — deployed to students. |
| Announcement_2_-_Introducing_Gate_1.docx | Second student Announcement. Introduces Gate 1, the two new documents, the Google Docs warning, and the Canvas confirmation process. Sent to all three classes (MSDS 453, 458, 498). Co-authored by Dr. Maren and Claude. |

1b. Gate Status

- Gate 1 (Form and Style Review): COMPLETE and deployed. Students have all documents needed to begin.
- Gate 2 (Title Page Review): Framework in place via TC-001. Facilitator Notes for Gate 2 not yet written.
- Gate 3+ (Content Review — Introduction, Literature Review, etc.): Not yet developed.

1c. Outstanding Items — Next Session Priorities

1. Briefing Document v1.3: Add Google Docs warning to the first session protocol (Section 6). This was identified during today's session but not yet executed because the project file is a text extraction, not a true .docx. Needs to be rebuilt from scratch or provided as a fresh .docx.
2. Announcements Collection: Go back and collect the text of Announcement 1 (earlier today), create a .docx file, and add it to the repository alongside Announcement 2. Simple task, ~10 minutes.
3. Gate 2 Facilitator Notes for Claude: Build the operational session guide for the Title Page Review, following the same format as the Gate 1 Facilitator Notes. Source material: TC-001 and the Briefing Document Title Page criteria.
4. Monitor student Gate 1 interactions: Collect feedback on what worked, what confused students, what edge cases emerged that are not yet covered. Use to inform Gate 1 Facilitator Notes v1.1.

5. Begin TC-002 through TC-009: Remaining eight YouTube videos in the 'Writing Your Research Paper' playlist, following TC-001 format.
6. Phase 2 Content Gates framework: Develop specific criteria for each report section (Introduction, Literature Review, Data, Methods, Results, Discussion, Conclusions).
7. Sideline Task — Ecosystem Replication: Parked. Return when Gate 1 student deployment is stable.

1d. Design Decisions on Record

- Work Session Summary format: Single rolling document, not a series of dated files. Structure: Current State (Section 1, always up to date) + Session Log (Section 2, newest entry first). This gives Claude a single source of truth at the start of each session.
- Point-by-point student confirmation document: Decided against. The Canvas confirmation statement is sufficient for Dr. Maren; the Appendix B AI Interaction Log is the appropriate detailed record for the student's portfolio.
- Gate 1 upload assumption: Student has both files open locally but has NOT uploaded to Claude yet. Gate 1 is a visual task. Upload happens before Gate 2.
- Google Docs warning placement: Both in the Style Checklist document (as a merged warning row between SC-3 and SC-4) and in Claude's Gate 1 opening remarks (Step 3 of the Facilitator Notes sequence).
- Future faculty customization — date on Canvas statement: Not needed for Dr. Maren's use case. Noted as a potential option for other faculty adopters. To be added to a 'Things Other Faculty May Want' file (not yet created).

2. Session Log

Entries are listed newest first.

February 22, 2026 | Approximately 1:30 PM – 5:00 PM HST
Session 2: Gate 1 Completion and Student Deployment

Participants: Dr. Alianna J. Maren & Claude (Anthropic)

Session goal: Complete Gate 1 materials and deploy to students.

Documents produced this session:

- StyleChecklist_Gate1_2026-02-22.docx — built, refined through multiple iterations (sentence length, Google Docs warning box, upload assumption clarification), validated, deployed.
- Gate1_FacilitatorNotes_Claude_2026-02-22.docx — built from scratch as Claude's operational session guide. 8-step sequence table, 4 edge cases, tone and pacing notes. Revised to fix off-page quote boxes (nested table width issue resolved). Updated Step 8 to include explicit upload instructions for students new to Claude Projects.
- Announcement_2_-_Introducing_Gate_1.docx — drafted by Claude, reviewed and approved by Dr. Maren, sent to all three classes. Co-signed '— AJM (and Claude).'

Key decisions made this session:

- Rolling Work Session Summary format adopted (this document).
- Gate 1 confirmed as visual-only task — no student upload to Claude until Gate 2.
- Google Docs warning placed in both the Style Checklist and the Facilitator Notes Step 3.
- Point-by-point confirmation document decided against — Canvas statement is sufficient.
- Briefing Document v1.3 identified as needed but not yet executed.

February 22, 2026 | Approximately 1:00 AM – 10:30 AM HST

Session 1: Foundation Build — All Baseline Documents

Participants: Dr. Alianna J. Maren & Claude (Anthropic)

Session goal: Build the complete baseline document set for the AI Portfolio Coach Claude Project.

Documents produced this session:

- Claude_AI_Portfolio_Coach_Briefing_v1.2.docx
- Meta_Document_Briefing_Guide_v1.docx
- Project-Report-Template_2026-02-22.docx
- TC-001_TitlePage_YouTube_Summary.docx
- AI_Portfolio_Coach_About_Me.docx
- AI_Portfolio_Coach_How_To_Begin_v2.docx
- Announcement 1 (text only — .docx file to be created, see Outstanding Items)

Key conceptual decisions made this session:

- Claude's role title: AI Portfolio Coach (emphasizes portfolio/career goal over report-completion task).

- Gated strategy session framework: Phase 1 (Form and Style) + Phase 2 (Content). Each gate is a confirmed achievement.
- Report Template revised: Added 'Use of AI in Developing This Work' section and Appendix B: Log of AI Interactions.
- Two-layer document architecture: Layer 1 = Briefing Document (context-specific); Layer 2 = Meta-Document (reusable recipe).
- TC vs. EXT archive system established.