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Instructional Design Plan: Library Research Requests

Introduction to Unit of Instruction

It is well known throughout our firm that the library is responsible for a wide variety of tasks, including reference, collection management, conflict of interest inquiries and records management. Last year the computer support division created an online request form to help library staff streamline user requests. Since the form's creation, it has become standard practice to provide detailed instruction to administrative assistants on how to enter a research request using our custom-built submission tool. This training is typically conducted as part of the more comprehensive "new employee" instruction given to administrative assistants when they are hired.

The initial impetus for the creation of this training occurred last year. The training was developed in reactive mode because several long-time administrative assistants were having difficulty using the new online request form and asking many questions. The script and materials were developed in the firm's headquarters, not in our branch office. As will be explained further, the branch office would benefit greatly from a revised approach to this training. This instructional design plan is being submitted to law firm office management for approval and is based on the collaboration of library staff with the primary author, Tiffany Hrabusa.

Needs Assessment

When instructors perform a needs assessment, we must be sure to consider the host institution's culture, climate and politics, as well as the needs of the individual learners. These institutional factors are paramount to the need for a branch-specific training session. Although we are a corporate law firm that deals with many high-profile clients, our office is considerably more relaxed and informal as compared to our headquarters, which has a more sanitized environment. Assistants in headquarters refer to their principles as Mr. or Mrs. (rather than by their first names as in the branch office), the dress code is stricter, and the relationships among employees are much more formal. In addition, headquarters is about seven times the size of the branch office, introducing another degree of anonymity. In contrast, the staff of the branch office is more social, both in and out of work. Some staff members have been close personal friends for years. Camaraderie is encouraged by the senior management, resulting in a warmer, more congenial atmosphere in the branch office. This contrast in institutional culture will figure prominently later in our instructional design.

The potential learners in our scenario will be newly-hired administrative assistants. We can assume that they have relatively strong computer skills, based on the interview testing that our firm requires. These computer skills will include a passing knowledge of web browsing and online forms. Based on the degree of difficulty experienced by veteran assistants when the request form was rolled out, it is likely that at least half of the learners will *need* the instruction, while the other half may simply benefit from the refresher.

The learners will need to know what information is required by the form, who they must query to get this information, and how to successfully complete and submit the online form. As is typical with online forms, some fields are required, so the assistants will need to be able to distinguish between those fields that are nice-to-haves and those that are must-haves. The new assistants absolutely must know how to complete these online forms in order to adequately perform their jobs. The firm library is a busy place, and attorneys are typically anxious to get their requests into the queue. A delay is time lost but could also mean money lost. Assistants should be comfortable with the submission program so that they can

1) obtain any “required” information that was missing from an attorney’s request and
2) quickly fill out the form and submit it to the library.

Because we can assume that the new assistants will have at least a passing knowledge of the Internet and fillable forms, a one-hour training session is sufficient to complete the instruction. Dedicating just one hour is also justified when we consider that the new assistant will receive numerous training sessions throughout her first week. Additionally, a learning object will be provided to serve as a quick-reference guide until she becomes fluent with the program.

As previously mentioned, the computer training department in headquarters designed a training program for the new request submission tool in response to repeated questions from users. Since the tool was rolled out to all of the offices worldwide, it was generally assumed that the same training materials would also be used. Our experience with using these materials in the branch office has shown that they do not fit well with how training is conducted here.

The extant materials include a trainer’s script, a PowerPoint presentation, and a double-sided quick-reference guide. Most learners have found the script and PowerPoint slides much too formal. In fact, we usually end up skipping about 30% of the slides while doing the presentation, which sometimes only adds to a new assistant’s confusion (Why is she skipping information? Will I need to know that? etc.). We have completely given up on using the script drafted by headquarters. We understand the purpose behind drafting a script but have found it to be an inappropriate tool for this particular training and in our particular office. For the past several years (before the new training program was created), administrative assistant training in the branch office was conducted on a one-on-one basis, usually in front of a single computer terminal in a quiet office or conference room. Because we rarely hire more than one assistant at a time (usually the new hire is replacing someone who has moved on), the one-on-one nature afforded a certain level of comfort and support that integrated well with the relaxed, congenial office environment we try to create. Assistants were able to handle the computer’s mouse to try their hand at using the program under the careful eye of the trainer.

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The original training course was developed with headquarters in mind, where trainers stand at the front of a training room filled with computers and multiple learners. A projector screen displays the PowerPoint slides, and the trainer runs through the script. A question and answer period follows, and then the learners are dismissed. Monitored, hands-on experience is not provided. We have the same set-up available here in the branch office, but it is primarily designated for group trainings. Because of the nature of the extant training materials, however, we have been forced to conduct the trainings in our group training room, standing at the front of the room so we can control the PowerPoint slides while the single pupil sits alone in the audience. We cannot see her terminal or provide her with gentle correction if she misses a step.

For these reasons, the library staff has determined that the extant training script and PowerPoint slides are not satisfactory. The quick-reference guide, however, is a useful learning object that will be included in the instructional design.

Any member of the branch library staff is qualified to conduct the training. We have consulted with other library staffers and also plan to contact the branch computer support department to see if they will become instructional partners in the training program.

Instructional Goals

The goal for this unit of instruction will be to teach newly-hired administrative assistants how to submit library research requests online using the firm's request submission tool. Use of the submission tool is a necessary aspect of an assistant's job and will require use of moderate-level computer skills. Several library staff members consulted on the development of this design. The feedback received from these librarians was extensive enough that further inquiry (e.g. to attorneys) was deemed unncessary. We also sought out a few "graduates" of the previous training sessions to see if these veteran assistants had any additional input on the goals we should be striving for with our design plan; they concurred with the advice received from the library staff.

Our goal is measurable. At the conclusion of the training session, we plan to have each participant enter a research request from start to finish, thereby demonstrating that she has achieved the stated goal of the training session. Additionally, success can be measured by the longevity of the training material. When the assistant is asked to submit her first real research request, perhaps days or even weeks after the training is completed, she can consult her quick-reference guide and her memory, and she should not need any further guidance to submit the request.

Instructional Analysis (aka Task Analysis)

Here is the step-by-step list for how to train an administrative assistant to enter a research request:

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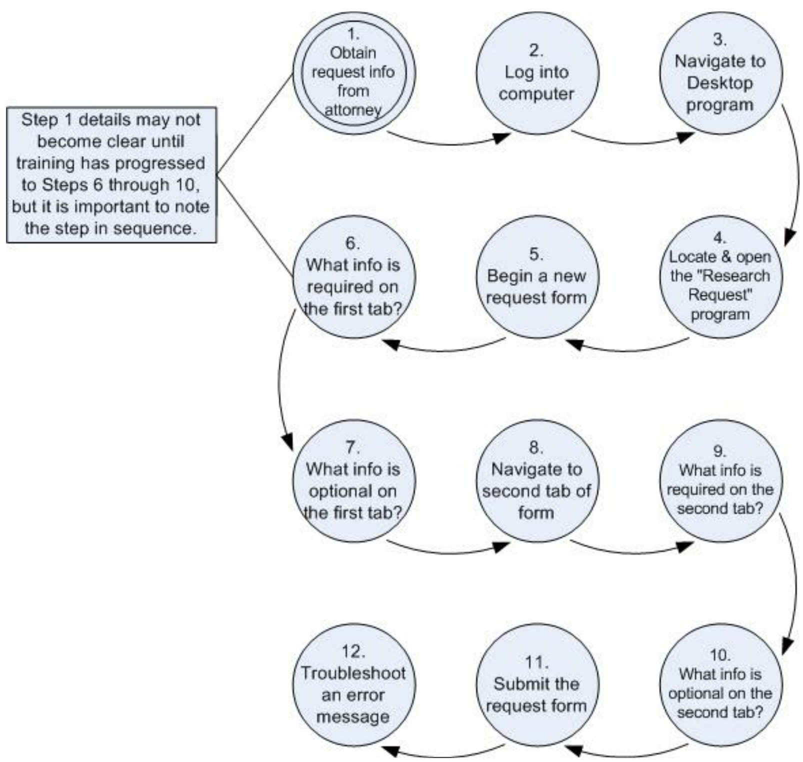
1. Obtain information request from attorney. [The details of this step will be omitted until later in the training; it is important to reference the origin of the information, though.]
2. Log into the computer.
3. Navigate to the firm's Desktop program.
4. Locate and open the Research Request tool.
5. Begin a new request form.
6. Note what information is required on the first tab.
7. Note what information is optional on the first tab.
8. Navigate to the form's second tab.
9. Note what information is required on the second tab.
10. Note what information is optional on the second tab.
11. Submit the completed request form.
12. Troubleshoot an error message.
13. [Evaluation of performance objectives via practice run.]

We have also created a flow chart to help visualize the steps, especially because the details of the first sequential step are not the first things that should be taught.



Entry Behavior and Learner Characteristics

The firm's hiring process for administrative assistant's is fairly grueling. Applicants are required to complete a 3.5-hour computer skills test that covers mostly word processing functions. If an applicant's performance on the test is satisfactory, he or she will pass to the next interview, and then on to hiring.

Based on the skill level required to "pass" the computer test, we can assume that all of our learners will have basic computer literacy and typing skills. Additionally, our office manager structures admin assistant training logically, with basic computer training on the firm's in-house desktop program (conducted by the IT department) occurring well before other more specific computer training. We can assume, therefore, that each learner will be familiar with logging into the computer and utilizing the desktop program. This knowledge will be tested, however, within the first three steps of the training session.

Since nearly all of the training sessions will be conducted one-on-one, a formal survey of computer skills is not really necessary. Instead, we plan to ask the learner if she has ever completed a web-based form before. We anticipate that most learners will respond in the affirmative, but the training will be designed so that those who do not have such experience will not be negatively impacted.

As stated, most of the training sessions will be one-on-one. All of them will occur face-to-face. The training is being designed with only one participant in mind, but the trainer could accommodate additional learners as long as there is a computer terminal for each user for hands-on practice. Our training room has seven training terminals, so the maximum number of students permitted is seven. If participation exceeds three people, however, the training session would have to be extended to 90 minutes (instead of 60) to allow the trainer time to spend guiding each student.

There is the possibility that firm management in our other offices may decide at some point in the future to centralize the training for this submission tool. If the branch office's instructional design is chosen to be the new, universal method, we would need to introduce additional teaching tools to facilitate remote instruction. Should the firm choose an asynchronous delivery, we will need to become familiar with instructional graphics and video tools. Likewise, if the firm decides to maintain the synchronous format of the training, we will need to become more familiar with training while video-conferencing. Other delivery options such as text-based forums (i.e. wiki) and learning management systems are beyond the scope of this training, regardless of in-person or remote format.

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Performance Objectives (aka Learning Objectives)

There are two performance objectives for this instructional unit:

1. Learners must be able to identify the pieces of information required to fill out a research request form and will demonstrate this ability by working on a practice request that has strategic gaps in the data.

2. Learners must be able to complete and submit a web-based research request form and will demonstrate this ability by entering the practice request data from the prior step into a test form.

Instructional Strategy

One way we will promote the training is to send an email in advance (perhaps a meeting invitation) that includes the quick-reference guide created for earlier incarnations of this training. By sending the learning object before the training, we hope to peak the learner's curiosity about the content of the session.

The learners will be primarily self-motivated to prove that they are capable of performing their newly-secured jobs.

The purpose of this training is to provide the learner with knowledge and skills necessary to perform one aspect of her job as an administrative assistant in a busy law firm: to efficiently submit library research requests on behalf of her principles using the firm's online submission tool.

Before training begins, learners must be able to navigate the firm's Desktop program (gauged based on introductory request to have user locate and peruse the Desktop). Learners should also know how to use a web browser; this ability will be verified verbally by the trainer at the beginning of the session and tested in practice in the hands-on practice at the conclusion of the session. Finally, knowledge of web-based forms is helpful, but not required for this training; the trainer will inquire as to the learner's familiarity with web forms at the beginning of session.

Because the learner will have the advantage of training one-on-one, we plan to allow the learner to control the mouse (with direction) for ultimate active learning. As we progress through the steps of the training, the learner will navigate between programs and enter text with prompting. We will pause on some screens to give more detailed explanations and so the learner can take notes. During the first twelve steps, we will be instructing the learner exactly where to point the mouse, enter text, and press a button. At step 13, the learner will perform the same previous 12 steps, but without step-by-step guidance. It is our hope that allowing the learner to have control of the mouse during the actual training will reduce any anxiety she might have once we reach the evaluation stage.

The evaluation will take place at the conclusion of the first twelve training steps. The learner will be asked to enter a practice research request from start to finish, beginning by responding to a (purposely incomplete) request from an attorney, navigating the firm's programs to find the submission tool, filling out the web-based form, and submitting it without receiving an error message.

The success of the training (and of the learner) must be assessed in order to verify that the administrative assistant has the skills necessary to perform her job. If the training does not appear to be successful, we will schedule a follow-up session to cover the same material again. We also plan to make periodic follow-ups via email with both the training participants (Have you used the submission tool in your daily work? How comfortable did you feel when you entered a request?) and attorneys (Are you satisfied with the expediency with which your research requests are handled by your assistant?).

Planning Instructional Materials and Learning Objects

We have the advantage of access to materials used in previous versions of this training unit. As previously stated, some of the materials are not suitable for the format of this design. There is, however, one object that will be useful. It is a double-sided quick-reference guide made in color and with screen shots. We plan to include it as a PDF attachment in the introductory email to the learner(s) and also provide a hard copy at the training.

The training session will be in-person and primarily one-on-one, which limits the applicability of certain instructional materials, like chat and VoIP tools. Our primary instructional materials will be:

1) Guided lecture—the learner employs hands-on techniques to follow along with the instruction, similar to the guided practice method; and
2) Quick-reference guide—as described above.

Guided lecture is the best approach for this material because the training is process-based, and the steps are easier to understand if the learner can follow along. Blogs, wikis, and group discussion all require a critical mass to be effective teaching tools; our hiring volume is too low to make these tools worthwhile. We will develop the guided lecture using lecture notes from older training sessions, but we will draw comparisons between aspects of the request tool and other every-day experiences the learner may have in hopes of making the content more understandable.

The quick-reference guide is an extant material, and its ease of incorporation into the training makes it an appealing choice. We are including it as a learning object for another reason, as well. Experience with learning and teaching the research request tool tells us that a quick-reference guide is useful to assistants after the training session has concluded. The guide will likely be used several times as a refresher before the steps to submit a request became automatic to the learner.

Formative Evaluation

It does not happen often that teachers are able to maintain long-term “professional” relationships with their learners, but we will be able to do just that. The administrative assistants who take part in our training will just be beginning their tenure at our firm. We will be available to them for questions or follow-up training, if needed. Having greater access to these individuals is both good and bad. It is good because we are almost certain to get formative feedback on the training session, and we will be able to gauge how successful the learners are at reaching the learning objectives over a long period of time. Greater access is bad because the learners may not feel they can give honest feedback because they are sure to encounter their trainer(s) frequently in the workplace.

Also, because of the one-learner-per-session format, we cannot offer the evaluator anonymity. For this reason, the questions will be brief and will ask for more constructive feedback, instead of a rating system. We plan to deliver the evaluation questions in the body of an email (since we will have access to the learners’ employee email addresses). Here are the questions we plan to ask:

Format
1) Did you feel the time allotted was sufficient for the material covered? If no, please explain.
2) Did you like the hands-on approach to the training or would you have preferred a more lecture-based approach? Please briefly explain your answer.

Materials
3) Were the real-life examples used in the training helpful? Are there any examples you suggest to help learners understand the material?
4) Is the quick-reference guide easy to understand? If no, please explain. Have you used the quick-reference guide to submit a research request?

Skills
5) Do you feel the training provided you with the necessary skills to complete this aspect of your job? If no, please explain.
6) Other than what has been covered in previous questions, do you feel that any adjustments need to be made to the format or materials so that learners maximize the training they receive?

Our response will be sent by return email and will be primarily a generic “thank you.” In situations that warrant a direct reply to one of the learner’s answers, we will do so as neutrally and politely as possible since we will be interacting with the learner professionally in the future.

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How to Implement the Instructional Design Plan

The goal of this instructional unit is to teach newly-hired administrative assistants how to submit library research requests online using our firm's request submission tool. The instructional design will be implemented to maximize success in reaching this goal.

The instruction will begin with email contact between the trainer and the learner, in the form of a meeting invitation. This invitation will include a PDF attachment of the quick-reference learning object that will be provided in paper copy during the training.

Once the trainer and learner are both settled into the training room at the appointed time, the trainer will begin by making introductions and handing out a copy of the quick-reference guide. The trainer will inquire as to the learner's familiarity with web browsers and web-based forms. At this point, the trainer will proceed with the steps of instruction outlined in the Instructional Analysis, allowing the learner to control the computer's mouse and providing guided lecture. As the instruction progresses through the steps, the trainer will be careful to provide adequate pauses to allow the learner to take notes.

The final step in the training serves as the evaluation of learning objectives. Once Step 12 is completed, the computer will be reset, and the trainer will advise the learner that she will now enter a research request on her own from start to finish, trying to rely only on her experience during the training, her notes, and the quick-reference guide. The trainer will play the role of "attorney" and give the learner a research request that is missing key bits of information. The learner will need to identify that information is missing, ask the appropriate questions to obtain the missing information, navigate to the request tool, enter the information, and submit the request form without receiving an error message.

Following the conclusion of the hour-long training session, and after no more than a week has passed, the trainer will send a formative evaluation email to get feedback from the participant. The precise questions can be found in the Formative Evaluation section of this proposal. Several weeks after the training has concluded, the trainer will send follow-up emails to both the learner and the learner's principle attorneys to measure their satisfaction with the training.

The designers are approaching the implementation from an ideal standpoint because we believe that the ideal is highly achievable in our circumstances. There are only a few (very unlikely) problems that might occur which would necessitate a revision of our training. These problems include:

- a work-related matter that would force the interruption or cancellation of the training session;

- a learner that managed to satisfactorily complete the interview testing and introductory "new hire" computer training, but does not, in fact, possess the necessary computer skills or knowledge to complete the request form training; and/or
- a learner who has severe "performance anxiety" and cannot complete the evaluation step of the training while being observed by the trainer.

We believe that the instructional design outlined in this proposal will vastly improve the request form training received by administrative assistants at our firm. We also believe that the design could and should be used as a template for the design of future courses on different topics. Thank you for your time and attention. We look forward to hearing your feedback.

Signed:

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Tiffany Hrabusa,
on behalf of the branch library staff