



## TRAINING FOR ONLINE SKILLS: AIMS & CHECKLISTS

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### YOUR TRAINING GOALS

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To provide library staff and others in their communities of interest with the confidence and skills required to more effectively exploit online information resources.

On completion of training/coaching sessions the participants you train should have:

- A realistic understanding of the benefits of online resources
- Sufficient confidence and skills to competently apply and further develop what they have learnt
- A set of transferable skills that they can apply to a range of online learning contexts
- A better knowledge of Web and database resources and current developments in the wider online world
- The confidence to ask questions and an understanding of where they can get further help.

### SCOPE AND TARGET AUDIENCE FOR THE TRAINING

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The training approach and the package of resources (or parts of it) have value for all regardless of their role and previous experience with e-resources, but will be of greatest benefit to those whose limited skills or confidence have constrained them from making effective use of online resources. The key aim is to transform poor users into confident users. The development of the training material has therefore focused on where it could be most effectively applied to the training and support of staff or students/customers whose lack of information and digital literacy skills have served as a barrier to their use of Web, databases and other online resources. Critically we aim to give trainees sufficient confidence and enthusiasm to build their own skills as required. We are not trying to turn out experts, rather users more willing and able to "give it a go", with the capacity to draw on a range of search strategies when first attempts fail.

While the package includes substantial coverage of EPIC resources its focus is not on product specific training – there are other vendor resources that provide for this. Rather it aims to build resource independent skills that are applicable to range of online resources, including EPIC databases.

## TRAINING ISSUES & PRESENTATION

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Nothing replaces the experience of training - of doing it yourself and evaluating how it went, of watching and learning from others succeed or fail in small (or big!) ways. But some prior anticipation of the issues you may confront, applied with an understanding of how adults learn and effective ways to deliver the concepts to be conveyed (preferably with some practice in this) will assist in approaching the whole exercise with more confidence.

### THE CONTEXT

What we do know is that you are required to impart both:

- knowledge (of content, tools, concepts...) and
- skills (topic analysis, searching, navigation, evaluation...)

as well as probably deal with:

- participant attitudes (anxiety, motivation...)
- if the training is to be successful.

The interaction of these various elements can place a significant learning load on the participants, particularly when faced with the many and varied interfaces and features of an ever growing range of databases. This makes it quite a complex process and you will not turn beginners into 'super searchers' through one or two sessions. You can only expect to lay some sound foundations for them to build on with experience. Most consolidation (and subsequent retention) of learning takes place in the weeks following training (and then only if skills are used) not on the day.

And, what is also probable is that in any session you may:

- Have a diversity of levels of experience and confidence, not to mention competence (and often a gap between actual and perceived!)
- Have to provide for a range of expectations (some inflated, some too modest) as to what they hope to get from it, and why they're there
- Have a range of preferred modes of learning
- Have to work around facility limitations.

There are as many approaches to training as there are to teaching and, while the two may have a lot of coincidence, they are not the same thing. Training generally has a more defined scope and narrower intended outcomes. EPIC has developed an approach that aims to take account of the above context. We have attempted to address these factors (as much as they can be) in the design of the training plans and supporting written handouts. For example we have provided a structure that:

- 'Scaffolds' the learning so that participants are not faced with a significant degree of new content at any one teaching moment, and the consequent learning 'load' is kept to a minimum
- Emphasises points of familiarity with what has already been learnt (eg. between Web and databases searching) so that participants can call on existing understandings and apply them as much as feasible to a new resource
- Allows for a mix of presentation methods that encourage active participation and focus on collaborative group learning
- Is not dependent on resources you may not have such as data projectors.

The key principles of this approach are summarised in the *ELTI Approach* descriptions attached.

Others factors will have to be addressed by your understanding of participant needs and any preparation you can do to manage foreseeable risks (from facilities or participants) as well as being flexible in the face of emergent needs.

The following checklist aims to assist you in this with some proven pointers and strategies to enhance your sessions. They are categorised into three main areas (3 'Ps' if you like) of 'Preparation, Personalisation and Presentation'.

## PREPARATION

Everything you do leading up to the session.

- Put time into developing an intimate familiarity with the material: the sequence, the concepts, the resources to be used as well as into checking or developing your own example searches or strategies. Demonstration searches that are topical, clearly exemplify points and are put into a context that the participants can relate to, will assist in establishing your credibility and maintaining their engagement.
- Be clear in your own mind about the concepts and points you are going to have to make, or elicit from the group. If you aren't clear, clarify them with an experienced colleague. This will help boost your confidence and the clarity and conviction of presentation on the day.
- Do use or adapt the 'Need Assessments' - even if informally applied they can provide valuable background to tailoring your course. The responses will not only assist you to prepare for the specific needs of the group but also indicate whether the potential participants would benefit from division into separate groups (if feasible).
- Learn as much else as you can about the participants: their prior exposure to the resources? are they keen, reluctant, or unconfident? what could be assumed of their expectations? what are their personal interests or current concerns?
- If at all possible try out bits of your session in the actual venue you will be training in - and find out if there is some technological support if things are not functioning?
- Have sufficient handouts and make sure all such material is clearly packaged and labelled – once you have started the session it can be difficult to remember all these details.

## PERSONALISATION

Things done to make the session more personally relevant to the participants.

- Review all the material in light of what you know about the information needs of the audience you are running the session for, and endeavour to insert as much as feasible that relates to their immediate needs and context. The example searches/'stories' are the most obvious things to adapt, but also use the 'Needs Assessments' to consider which sections could be skipped and which may need more time. Reworking the sessions will also help you develop more familiarity and confidence with the material.
- Where you know certain participants have particular personal interests or needs, try to cater for some of these in the emphasis or examples. This is particularly useful where you feel any participant may be fearful and/or lacking motivation – it will spark some interest and sideline the anxiety.

## PRESENTATION

How you deliver the sessions – the structure is largely set by the training plans unless you are confident you need to change these.

### Opening Up/Scene Setting

- Set the tone early – make it as informal and non-threatening as possible to minimise any participant anxiety. Chat before the start, ensure they understand this is not a test of certain skills. Make it clear that learning from trial and error and from search failures will be very much an expected part of the process.
- State in simple terms what you intend to introduce (the learning objectives), outline the process and structure, and your expectations. Ask about theirs if it's a first time group and try to make clear how these will relate to the session content. Recap what has been covered at the end of each major learning module or session.
- Include some self-disclosure of weaknesses or areas of uncertainty (without overdoing it!) so that you present yourself more as a guide or facilitator to learning rather than an 'expert' imparting your skills. The materials and the process are the core teaching tools - you are the medium to deliver this.

### Teaching Strategy

- Use as much participation as possible – in identifying issues, coming up with potential solutions, drawing out interpretations of what is/isn't happening, asking them what strategy, key points etc to put on the board. Make it about their collective experience more than yours, even if you may have to lead them to an appropriate response. It should be as much as feasible a collaborative, not a trainer centred, process. While this may take longer than a straight up instructional presentation, there is much more likelihood that what is imparted will be understood and retained.
- Whether or not you accept the concept of preferred 'learning styles' (there is not strong evidence to support many of the claimed 'styles') it is good practice to use a range of modes to impart skills and knowledge. A mix will not only cater for a range of ways in which different participants may process information, but also keeps things alive by breaking routine, changing media, activating different senses, changing group dynamics etc. So, where feasible (given group size and facilities) use a mix of hands-on activity (they should do the keyboarding, not you), some work in pairs, short exercises, etc. Write up key points on a board and continually use group participation to come up with next steps or resolutions. You may have seen the following retention of learning scale (or variations on) in training sources – the so-called 'learning pyramid'. Despite widespread reproduction there isn't strong evidence to back its apparent precision, but it does convey some generally valid points about the effectiveness of different modes of learning:

listening 5%  
reading 10%  
AV / slide show 20%  
demonstration 30%  
group discussion 50%  
practice by doing 75%  
teach others or use in context 90%

Does it roughly align with your own experience? There is a broad consensus that interaction and participant activity enhances and significantly increases the average learning retention rate. A range of individual factors can of course affect actual rates.

- Use a whiteboard or similar as a medium to emphasise key points made verbally - write up URLs, search statements etc to assist the group to focus on you and these points, rather than be constantly buried in their screens. This serves both to signal key learning points and ensure all participants are entering the same terms. Remember though not to neglect clear verbal instruction if you are aware of any sight-impaired participants.
- Good group participation can be subverted by the odd participant who wants to dominate contributions or contest approaches. Try to defuse such situations by continually putting the question or the issue back to the group: 'How do they feel about that...? What is the experience of your...? etc...and/or put questions directly to the quieter participants.
- Use as much anecdote or odd detail (statistics, disguised real life incidents, 'stories' ...) as you can without making it long winded. Stories, incidents, examples are remembered - instructions aren't! (As noted previously) when using searches to convey a concept or strategy make it as real life as possible - provide the context, the information need that is being addressed so that it is not abstract. This also vitally contributes to focusing on evaluating 'success' in the context of an actual information need - the skill they have to apply back at the work front. Drawing examples from recognisably real information needs will also assist with those participants who are reluctant adopters of digital resources. Their recognition of the utility and benefits of the resources will motivate the gaining of skills and increase the 'stickability' of training.
- As far as possible tailor your session to the perceived median ability level of the group. Be prepared to go beyond the lesson plan (though not beyond the limits of your own knowledge and skills) or to ditch parts of it that are not going to work well with a particular group. But don't leap into a lot of new material believing you will stimulate them. Many may be overwhelmed and the required understandings will not stick.
- Move around the group to ensure that all are coping with the hands on bits or exercises – don't lose any participants! If you perceive that some are very deficient in basic skills you may need to pair them with a more able partner (pair everybody though preferably). Where you know the skill/experience range is quite diverse then consider doing this from the beginning - the faster assisting the slower. Just encourage the faster not to take over. (They could in fact learn as much or more from having to think about the 'failure points' of the weaker participant)
- When one participant heads down the wrong path put this back to the group as a general issue that others could be waylaid by also, a 'we' problem to be resolved by discussion or group suggestion. Treat all participants with equal respect – some may need more support but they can be just as valuable to the group learning experience in raising or identifying issues.
- Don't get caught up in trying to teach set procedures or all the features of an interface or database – even if less secure participants demand it. Make it clear that the focus is more on imparting and giving actual experience of concepts, general strategies and potential resolutions to various information needs, and that detailed knowledge of particular tools will come with frequent use. Assure them that a focus on broader issues that are not database dependent, will instil skills that are more transferable in the very diverse online world.
- Where participants are struggling with detail assure them they will get some consolidation from the handouts they will be given. If however, they are obviously not getting a core concept you will need to stop and spend some group time on this - quite possibly others

may be a bit vague on it also. More worked through examples, are probably the best approach here.

- Whenever you have to lead them through a process, evaluate a source or change strategy etc, use a 'think aloud' technique to provide commentary on exactly what your thinking is in doing this. This serves subtly but powerfully to convey sound approach and strategy. Don't just do tell them what to do and expect them all to pick up on exactly why.

### **Time Keeping**

- Have some target points in the training plan that let you know roughly where you expect to be at a set time.
- Be prepared to drop some of the content and/or to speed up presentation if you are falling behind time, but try not to sacrifice the important concepts or the hands on activity. Racing through with demonstration only in order to cover all the material will not result in learning retention.
- Don't let questions take you too far from the main thrust of the presentation - suggest this will be covered in a later session or that you could discuss it individually later.
- Get participants to arrive five minutes before the actual starting time so they can settle down before you start. Have tea or rest breaks when you sense any general flagging of effort or learning overload.

### **Concluding/Winding Up**

- Finish up each session by restating what has been covered (or not?) where they have moved on to, and where this fits into the context of any future sessions.
- Ensure they all have the handouts and encourage their reading and the application of their new skills and knowledge as soon as possible. Make them aware this is vital to consolidating and developing the skills. Do NOT however overload them with material as this could hinder rather than enhance learning. Stick to the basic section material from the *Training Resources* and EPIC visual guides to databases if applicable.
- Refer participants who have struggled in parts of the session to relevant parts of the handout(s) for review and consolidation of information. If feasible give them exercises to work through and test and refine their understandings. (Ask EPIC if you don't have any).
- Provide names of people (you?) they can turn to for support.

### **And most importantly...**

Try to relax and enjoy yourself. This (or its opposite) will communicate itself to the participants more than you think. Remember it is a small group, collaborative learning endeavour – not a presentation which in which you are expected to be polished and all-knowing.

### **LEARNING FROM IT ALL**

To return to our beginning – 'nothing replaces experience'. You've done a session (congrats) but to really benefit from it you need more than just a gut feeling as to how it went. Evaluation therefore is critical. It doesn't always have to be exhaustive or terribly formal but should (1) preferably be anonymous and (2) cover basic aspects such as what each participants valued most (or least) from the session, and how they felt about the balance, scope and the pace of material covered. The focus should be on assessing the value of the training and materials, not you as a person!

If you are interested in using a written evaluation process an outline of the typical content and structure for a short form is attached to assist in developing your own. Bear in mind though that comments given directly after a session are influenced by a number of factors beyond the perceived 'quality' of your session – tiredness, lack of adequate reflection, haste to get away etc. Generally they only reflect satisfaction ratings, not the extent of learning. It may be preferable to administer the form some days after the session. More thorough evaluation requires a longer-term programme that considers the assessments of peers or managers of the impact of the training on the participants, and other measurable outcomes such as the extent of uptake of digital resources.

The responses you get from any evaluation need to be assessed for their validity and consistency, and then acted on – otherwise they aren't of any value. Where comments suggest the facilities or context detract from learning then you have solid evidence to take to management to ask for improvements. Where they indicate some feature of your presentation was hindering learning then you need to be honest enough to recognise this, review and correct this (if small) or seek collegial or EPIC advice if it is an aspect you feel uncertain how to remedy.

**Use the following 'Good Practice' checklist to quickly review your efforts before and after your sessions.**

## 'Good Practice' in Training Presentations

IN EACH TRAINING SESSION AIM TO:

<b>State objectives &amp; expectations</b>	Open each major session with a clear statement of <b>learning objectives</b> and ask the <b>expectations</b> of the participants.
<b>Present in a service context</b>	Present material as much as feasible as the resolution of <b>information needs</b> in a <b>realistic context</b> . The activity should be a <b>service issue to resolve</b> not a 'thing' to use or master in the abstract.
<b>Make it a group process</b>	Challenge and work with the group to find the effective or appropriate solutions – make it a <b>collaborative learning</b> process, not a trainer centred demonstration or instructional lecture. Keep them creatively involved.
<b>Recognise participant diversity</b>	Be supportive of <b>slower participants</b> – strong anxiety will impede their capacity to learn. If one participant is struggling to grasp a concept refer it back initially to the group to resolve or interpret – make it a <b>group issue</b> .
<b>Focus on general skills not the tool</b>	Teach where feasible <b>strategies and generic skills</b> - not features, operations or set steps that are tool/resource dependent.
<b>Learn from 'failure'</b>	Provide <b>opportunities for things not to work</b> , and then how to work around these blocks. Participants will learn <b>transferable strategies</b> from such 'failures' much more readily than from following given successful steps.
<b>Mix modes &amp; media</b>	Deploy a <b>mix</b> of teaching <b>modes and media</b> – participant hands on, group discussion, exercises, whiteboard; but <b>don't give out the written handouts until after</b> the concepts are presented. This can split attention and hinder learning.
<b>Enrich the context</b>	Draw on ' <b>stories</b> ', anecdote, analogies – anything that's illustrative - to <b>enhance learning retention</b> .
<b>Let them do it</b>	Let <b>them do</b> the keyboarding and <b>hands on</b> manipulation – it may be slower than your demonstration but instils a lot more confidence and consolidation of learning.
<b>Don't be static</b>	Move around the group and check on, <b>work with all participants</b> ; but when you want <b>make a critical point</b> return to a consistent central spot and ensure attention is focussed.
<b>Let them know what you're thinking</b>	Use a ' <b>think aloud</b> ' <b>process</b> whenever directing or demonstrating anything – don't leave them to figure why something is being done or selected.
<b>Summarise sessions</b>	<b>Recap</b> on what has been covered at the <b>end of each session</b> and provide an opportunity for questions.

## TRAINING EVALUATION FORMS: RECOMMENDED CONTENT

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Draft up a simple evaluation form of no more than one A4 side that includes the following elements and areas – but use your own words!:

**Course/Session Title:**

**Date:**

**[A rationale for completing] :**

To enable us to assess the effectiveness of this training and improve its presentation we would appreciate your feedback on the ... session.

**[Sample Survey Questions - tailor as appropriate to your course. Responses could be indicated as straight Yes/No queries or more usefully a simple 1- 5 rating scale and/or short comment as required] :**

How relevant was the content to your work demands?

What would you add or remove to the content to make it better suited to your needs?

State 1–2 things you have learned of today that you would apply in your work.

Was the pace of the session: Too slow? About right? Too fast?

Was there enough opportunity to discuss and clarify any issues?

Was there sufficient hands on time to familiarise yourself with resource(s)?

State one thing you would suggest to improve the presentation of the course?

Would you like to participate in future sessions? If no, why not?

Were the facilities adequate for the training required?

Overall rating for the session: Low value? Of some value? High value?

**[End note] :** Thanks for your comments!



## THE TRAINING APPROACH

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### THE AIM

Provide librarians with an effective approach to online skills training that can be readily applied by inexperienced trainers and will enhance participant confidence and learning retention.

### THE STRATEGY

#### **Reduce the Learning Load**

New material is most effectively and efficiently learned when the learning (cognitive) load is kept to a minimum at any one stage. The ELTI training plans and accompanying written resources are carefully scaffolded so that participants move from the familiar to the less well known, step by step. Points of coincidence among resources, interfaces, and search functionality are emphasised so that the already known is explicitly recognised and can be drawn on.

#### **Keep It Simple & Generic**

The training focuses on skilfully using 'basic' search interfaces. This facilitates (1) the establishment of core search skills that are transferable from the known (eg. search engines) to most databases with some easily understood tweaks and (2) the building of confidence in the inexperienced searcher. New resources or interfaces are introduced in a generic sense rather than placing emphasis on their individual characteristics. Presentation also avoids abstract concepts, deriving understandings from observed results.

#### **Get Engagement**

The training deploys a questioning, collaborative style. This encourages engaged, active learning through challenging the participants to think their way as a group through many of the search steps or points of failure. Such engagement contributes to better concept retention and a greater capacity to construct and adapt search strategies back on the job. Engagement is also stimulated by the use of recognisable, real life contexts, each learned concept being embedded in a realistic search or service 'story'.

#### **Build Confidence**

Participant confidence is built and maintained by the scaffolding and drawing from their experience or thinking to work through processes. This serves to convey that what is required to be a competent searcher is not beyond them - that if they master a few key understandings they can apply these with some confidence across a range of online resources.

### THE OUTCOME

The approach may require slightly longer training sessions to introduce resources and concepts but, if well done, will result in significantly better retention of learning, the acquisition of more transferable search skills, and a greater confidence and willingness to persevere with online resources. And, given learning from training only consolidates with recurring use, this perseverance is vital.