CONTRA COSTA COUNTY LIBRARY

OVERVIEW OF TRAINING FOR CONVERSION USING PEER TRAINERS

March 2004

Contra Costa County Library trained 205 employees (March 2003) in a new GUI interface (circ & ref) in 20 training sessions taught by training teams drawn from 22 peer trainers. With documentation provided by the vendor CARL, Automation and public service staff worked together to adapt and re-work a lesson outline and handout that would work for our staff. The same approach was used to train all employees in Lotus Notes in May-June 2001. The following discussion will outline:

- Establishment of a training database, both for training sessions and for practice by staff in their branches.
- Selection of the peer trainer team.
- Development of the lesson plan, tested on the peer trainers, revised with their help.
- Preparation of and support for trainers, and support pieces for staff PC's (such as glossary, keystroke key strip for terminals, etc.)
- Scheduling of training sessions, trainer teams, and staff participants.
- Roll out of training, and methods of providing staff support during practice prior to actual conversion date.
- Q & A
- Conclusion: 10 reasons to use peer trainers.

Janet Hildebrand
Central Library Manager
(925) 927-3229
jhildebr@ccclib.org

Gail Middlekauff
Library Circulation Manager
(925) 927-3255
gmiddlek@ccclib.org

Contra Costa County Library
1750 Oak Park Blvd.
Pleasant Hill, CA 94523

Establishment of a training database, both for training sessions and for practice by staff in their branches:

Practice exercises for training: Automation staff set up a training database with dummy accounts and practice exercises that could be refreshed between trainings. For example, with GUI Circ training, CARL provided the "area" and the lead Automation person for this project added a small mock collection and about 200 dummy patron accounts. From that, she made up lesson exercises, so up to 20 participants in the lab had different exercise sets to practice check-out, check-in, etc. All training took place in our Gates Lab.

Practice opportunities after training: We were concerned that if it took 4-6 weeks to train all staff, those who took the training first needed to be able to practice right away to retain the training. The training database for Lotus Notes was available at workroom stations in all branches throughout the training period, before a cut over date for the e-mail system.

With GUI Circ, the old OV-Lite text module and the new GUI interface module (both CARL) were overlaid and used simultaneously. As soon as each staff person completed lab training on the training database, he or she could begin using it right away on the public desk, but cut back to the old text interface if stuck. Two weeks after the end of GUI training, the OV-Lite option was removed, and we functioned from that point on with only the GUI.

Selection of the peer trainer team:

Invitation: Gail sent out an All-Staff e-mail informing of the upcoming change and approximate timeframe to train all staff, and invited volunteers who would like to be trainers or coaches. She described what trainers and coaches would be doing and the expected commitment:

- attend two 4 hr. sessions to learn the material and assist in finalizing the training outline (and we included those dates),
- assist with the teaching or the coaching for 2-4 training sessions for staff in 4-hr. morning or afternoon sessions.

Recruitment: We accepted volunteers from all classifications, and even some substitute staff. Janet and Gail talked up with branch managers the advantage to them of providing a trainer/coach from their branch, because that would mean a very knowledgeable person would be on hand in their branch to support the rest of the staff with their learning. We asked them to recruit the people they thought would be the best in that role.

Final Selection: When all the names were in, Gail, Janet, and a Deputy County Librarian who with us is in charge of training, and the Automation lead person Stacie Deng reviewed the list and made the final selection. We had more volunteers than we needed. We specifically thought about who would be in the teaching role and who in the coaching role. Each class would have two trainers and two roving coaches. We did some recruiting to get some to agree that they would be trainers speaking to the whole class, in cases where that would be new for them. We considered whether each branch had someone, and specifically recruited someone, if not. We selected 22 employees to work with us. Very few were turned away. We planned to match different strengths when we scheduled the trainers/coaches, and we tried to find an appropriate role for everyone who wanted to be involved. We presented all roles as equally important.

Development of the lesson plan, tested on the peer trainers, revised with their help:

Background preparations by Automation: Using CARL documentation, our lead Automation staff person on this project made adaptations to the material by the following:

- Eliminated ILS Administrator instructions,
- Substituted our screenshots in many places,
- Substituted our own exercises from our practice database.

Further lesson development with peer trainers: The 22 peer trainers came to a 4-hr. session in the Gates training lab to review the lesson material and presentation draft, followed 2 weeks later by another 4-hr. session to review all the revisions, finalize the training outline, and determine the length of time needed for the training. While learning the material, they were to:

1. Question anything that was confusing. If any one of them was confused or left behind, it meant we would lose 1/3 to ½ of our employees!
2. Consider the slowest learner in their branch, and consider how to build the lesson from “easiest” to gradually harder. What would build best on what? The goal was to have the slowest person feel successful and clear for at least the first half of the lesson time, and the average person be able to follow all the way through!
3. What could be covered and absorbed in one lesson? Should it be split up? Should Clerks and reference staff be trained together or separately?
4. Is it always clear why a function is being learned and for what it is used? Have we built in natural transitions between topics, so learners are led along the path?
5. Do the practice exercises at the end of each learning segment accomplish their purpose?

The result of involving peer trainers in this way is that they became totally committed to the project and put in enormous effort preparing themselves. They felt great being able to help shape the lesson. They communicated a lot with each other as a group as they went back and practiced, came across more questions, and the networking among them prepared them to work well as training teams. Having to think about all the questions involved in designing a good training prepared them to be better trainers. Plus it was simply a better lesson plan as a result. The additional changes made in the training plan were:

- Changed the order in which some lesson segments were presented,
- Planned how trainers would bridge from one segment to another so each new item had a context,
- Re-worded some language to make it more understandable to our staff.

Preparation of and support for trainers, and support pieces for staff PC's (such as glossary, keystroke key strip for terminals, etc.):

Discussions about training practices: Among this group of 22 peer trainers, we had some experienced trainers and some first time trainers. We spent part of the second trainer session sharing what works and doesn't work in training, and talking about the most essential practices. We also delineated the roles of trainer and coach, and how they compliment and work with each other. Janet made up tip sheets for each of those roles. We spent time talking about the ways you make sure your class is with you, eyes, body, mind, before you lead them along through an explanation. An essential role of coaches was to quietly remind people to sit on their hands and watch a demo with their full attention.

Observing and partnering: When scheduling the 20 training sessions for all staff, we always ask the Automation lead person to teach the first session. We invite all new trainers who want to observe the lesson being effectively taught straight through on a live class to attend this session as an extra. Later when discussing scheduling of trainers, I'll talk about how we pair experienced with inexperienced trainers, and encourage the ones who are a little nervous to request specific sections to teach so they can find what is most comfortable for them.

Additional training tools: During the trainer preparation sessions, we identified additional support pieces that would aid staff in learning the new system.

- *Glossary:* Gail made up a "glossary" of terms to help staff bridge from the old system to the new system. During training we used the new terms, always pointing out the link with the old, and the trainees could have the chart sitting next to them throughout and take it back to use as long as they needed.

- *Keystroke keys:* Because we wanted to encourage the use of keystrokes, instead of mouse, we also made up keystroke keys on yellow cardstock strips that could sit along the top of the keyboard with a reminder of those commands. Each trainee received his or her own during training to keep and use later in the branch.

Scheduling of training sessions, trainer teams, and staff participants:

Scheduling sessions: We set up approximately 24 training sessions at a variety of times over a period of 4-5 weeks to accommodate a variety of branch scheduling situations. The lab was reserved. All training was to take place in the Gates lab at the Central Library. By offering enough sessions and enough different times, branches were able to spread out their staff absences sufficiently, and the Library never closed to the public.

Composing training teams: In the first trainer session, I distributed the list of session times, and asked them to respond to me well before the second trainer session, so I could draft a trainer/coach schedule. I requested that they mark their 3-5 best times, and also note the times they could *not* be available. I tried to match inexperienced trainers with experienced trainers, and to balance Clerk and Reference staff on the training team. Sometimes I had 4 trainers who traded off training and coaching, each with smaller teaching sections. Sometimes I had 2 staff who were just in the coaching role, working with 2 staff in the trainer role. The training teams were not fixed. They were thrown together in different combinations for different classes.

Finalizing the trainer schedules, connecting team members: Before the second trainer session, I e-mailed the draft trainer/coach schedule out to the group, and only had to make a couple adjustments from the feedback they gave. At the second trainer session, we encouraged people to meet those they would team with (often different people for different sessions), and to work out who would teach which parts. We expected branch managers to allow these trainers the time they needed to practice on the training database in their branches to prepare for their teaching and coaching. We allowed substitute staff who were trainers to go into any branch and have 4 hrs. to practice the material. We also allowed trainers to sign up to observe another session being taught before their own turn to teach, if they felt the need.

Scheduling all staff for training: At this point, we e-mailed “All Staff” and invited them to work with their supervisors on scheduling and sign up for a session. A Clerk in the Reference Dept. handled all the sign-up communications, confirmed registrations, sent out reminder e-mails before each session, and provided sign-in lists for each workshop session. We asked staff to give a first and second choice of session. Later we cancelled about 4 sessions that had less than 3-4 people, in which case we worked with them to find another session. Staff was eager to get in an early session, so the last week tended to be less full.

Reviewing and adjusting trainer/coach assignments: As we reviewed enrollment lists, we noticed when we had an employee here and there that we knew would need more help, and we adjusted the roving coaches for those sessions. In the case of one employee, we assigned our Senior Clerk trainer for new employees to be in her vicinity, and mostly do nothing else but help her keep up with the class. If a class was extra large, we also added a trainer or coach. We looked to see where our most challenging personalities were in the enrollment, and made a trade in a couple places to be sure we had trainers who were confident enough and would be able to keep the class on course. I don't want to give the impression that we made a lot of changes, but we took the moment to give these questions some thought.

Roll out of training, and methods of providing staff support during practice prior to actual conversion date:

Model time schedule: The first session, taught by the lead Automation person (the only session she taught), was observed by about 5-6 new trainers. By prior arrangement, one of them recorded the start time for each training component and practice exercise unit in order to create a realistic timeline. This helped all the trainers to keep on schedule with their training sessions and get through all the material.

Early feedback from evaluations: Staff participants filled out evaluation sheets each session. I reviewed the comments all through the first couple weeks, and e-mailed the trainer group both the positive comments about training, and also reminders arising from the negative comments.

Immediate practice: When we did Lotus Notes training in May 2001, staff practiced on training databases on their branch workroom stations until the cut over date to the new e-mail. With the GUI Circ, we were able to run the new CARL GUI Circ on top of the old text-based CARL OV-Lite. As staff finished training, they could go back to their branch and start using the new GUI at the public desk. Two weeks following the end of training, the cut over was made to eliminate OV-Lite entirely.

Trainer e-mail group: Trainers and coaches all through the preparation, training and the first 1-3 months of GUI used the committee e-mail group (Committee: GUI Trainers) to communicate their questions or bring attention to things that didn't work properly. The lead Automation person responded promptly to those questions, and made fixes when necessary.   Since trainers were planted all through the branches, as well as including some roving subs, all locations received support from the staff who had worked to make themselves the experts.

Q & A:

Did your trainers teach everything?

In our library, all reference staff learns circ functions, and all circ staff learns some of the most basic PAC functions and the "router list" for searching patron reserves. All of our trainers learned all the material for GUI training. However, in practice, Clerk and Library Assistant trainers sometimes felt most comfortable with the GUI Circ sections of training, and Library Assistant and Librarian trainers sometimes felt most comfortable with the PAC functions. We tried always to group trainers and coaches so their strengths would compliment each other and they could trade off as their comfort levels dictated.

How many staff per class? How many trainers?

The early classes mostly filled to capacity in our Gates training lab, meaning 20 students at 20 computers.

To make it easier on branches to spread out their staff shortages, and spread out the use of substitutes system-wide, we offered lots of sessions at a wide variety of times, and then didn't worry if classes ranged from 5-20 students. Towards the end of the approximately one month of training, the class sizes were smaller.

Here were the steps that led to adjustments:

1. Initially, we planned for 2 trainers and 2 coaches per session.
2. Next staff was enrolled. The Clerk handling sign-ups compared against the roster and pursued the last sign-ups until everyone was accounted for.
3. We then reviewed the enrollment lists, and reduced to 2 trainers/no additional coaches for small classes, but never less than that. We added coaches, if there were students we knew needed more than average help. We only cancelled classes if we could see early on that there were some with 2-4 students, and it was possible for them to find another convenient session.

Mostly all of this was clear after sign-ups concluded, and before the training actually began, so the adjustments could be made from the beginning.

Make-up sessions: When training was completed, we inventoried the enrollment sign-in sheets, identified staff that had missed training, and followed up to find out why. We scheduled a make-up class about one month later, and one-on-one training for individuals returning later than that from maternity leave or medical leave.

How long were your training sessions?

For Lotus Notes, our training group decided to break the training into 3 separate sessions: Lotus Notes 1: Basic e-mail for everyone (a 3-hr. session); Lotus Notes 2: personal address book, e-mail tools, filtering, searching, etc. which about half the staff would want; and Lotus Notes 3: To do list, calendar, etc. which a much smaller group would want.

For GUI training, the opposite decision was made by our trainer team. They decided it could fit in one training session, (4 hrs. with two good breaks) and that everyone needed to be exposed to everything. Most everyone needed to know the circ functions well. If PAC functions were at the end, Clerks needed some of it, and would get exposure to the rest. The PAC portion of the training was only about the last quarter of the training session.

Did you train all staff or only supervising staff (who then trained their staff)?

We give direct training to all staff to equalize everyone's chance at success. The trainers are selected for their aptitudes, qualities and knowledge specific to the project. Supervisors may or may not be equally strong in those qualities.

What worked and what didn't? Why? What would you do differently if you were to do it again?

Everything we learned in Lotus Notes training, we applied in the GUI training, as outlined above. Some of the things we did better the second time:

- Delineating more clearly what would be expected from trainers/coaches from the beginning (i.e. attend both preparatory sessions, teach/coach a minimum of 2 sessions).
- More coaching of trainers on how to keep classes on schedule, and other important training techniques (we had more new trainers for GUI).
- In addition to hand-picking trainers, we did more recruitment to get the trainers we wanted for GUI.

All the up-front work to prepare and involve lots of people paid off in a very smoothly running training month, and generally excellent evaluations from staff.

CONCLUSION: 10 Reasons to use Peer Trainers for Conversion Training

Possibly it might seem easier to have one trainer (yourself?) teach all 20 classes, and forget the fuss, BUT you would be missing out on so much! Here's what you get with peer trainers.

1. Creates widespread staff involvement and excitement.
2. Places expert coaches at each site and throughout the system, as the rest of the staff learn.
3. Ensures a strong lesson plan by the involvement of these employees in planning.
4. Trainers build new collegial relationships and a strong communication network.
5. Shares the burden, and thwarts burnout! No one person teaches/coaches more than 2-5 sessions, and never the whole session alone. Tasks of preparation, registration, and roll-out are shared by many, many people. Emergencies are not crises, because several people know what to do.
6. Staff participants walk into a well-organized experience.
7. Paired trainers back each other up and compliment each other's strengths.
8. Peer trainers grow before your eyes, and their personal development is as important as anything else being taught!
9. Peer trainers often go on to be peer trainers again, and continue to grow as trainers.
10. Creates an organizational culture of peer training for many learning situations.

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“HOUSEKEEPING” CHECKLIST
GUI CIRC TRAINING

- **Gather supplies and key:** From the second shelf below the Reference Dept. schedule board on the right-hand end, take the notebook that reads on the spine, “Computer Lab Procedures.” Inside this notebook are the key to the lab and at the back, a zipper pouch with a light pen. From the counter top under the Reference Dept. schedule board, gather the GUI Circ handouts, the set of training exercises, the evaluation forms, the pouch with the registration sheets for that day, the timecard sign & holder.
- **Enter the lab and set up for session.** Unlock the doorknob lock on the inside. Set up the registration sheet and the timecard sign/holder on the small table just inside the door. If the lights don’t turn on at the wall switch, go to the breaker panel just outside the lab door, and turn on breaker switch number #7 (there’s a little paper label that reminds you which one!). Log in the instructor’s computer with its special password (can be found in the computer lab procedures notebook if you forget). Write the names of the trainers & coaches on the dry erase board in front of the class.
- **Make sure all participants have signed in on the enrollment sheet, and that P.I. staff have filled out a timecard.** Explain that all permanent staff members who are putting in extra hours, should record extra hours on their home branch timecard assigned to their branch org code. P.I. staff leave their timecards in the timecard holder in the lab before they leave.
- **Start with a brief overview of the lesson plan**, i.e. what will be covered, structure of the lesson alternating demonstrations and practice sessions. Help them to have a visual road map. Mention how this training will benefit them. Share your enthusiasm about how great GUI Circ is going to be! Emphasize that they will practice after each demonstration. Ask trainees not to jump ahead of the class.
- **Inform the class that they will have two short 10 min. breaks** during the 4 hr. session, and it will be important to start promptly after each break in order to get through all the material. Then it’s important that you do exactly that!
- **Introduce the coaches and explain what their role will be in helping the class.**
- **Make sure participants leave understanding that they may begin to practice GUI Circ as soon as they get back to their branch.** Explain that both GUI Circ and OV-Lite are available throughout the training, and OV-Lite will be discontinued a while after all staff are trained. Reassure them that they can direct questions to the GUI Trainers Committee afterwards when they are back at their branches, or to Stacie Deng in Automation.
- **Put away supplies and close the lab**. Return the light pen to the Computer Lab Procedures notebook, and return the notebook to the Reference shelf, regardless of whether yours is the last workshop of the day or not. The notebook is never to be left in the lab unattended. Lock the lab door. Place the completed enrollment sheet and evaluation forms in the pouch. Return the pouch, timecard sign/holder with timecards to the counter below the Reference schedules. If there is another training session in the same day, leave all the computers on. If not, shut down all the computers. Lock the door to the lab. (Except on Monday at 4:00 when PSC uses the lab immediately after. On that day, return all training materials and Lab notebook to Reference, but leave the door unlocked for PSC.)

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TIPS FOR GUI TRAINERS

- Get the attention of your class before doing a demonstration. One experienced trainer suggests the mantra, “Eyes on the screen. Hands off the keyboard.”
- Don’t rely solely on the cursor to demonstrate where you are on the screen. Verbalize it (i.e. “in the lower left corner you’ll see a box that says…”), and use the light pen if it would be helpful. Communicate frequently about where you are and where you need them to focus. Identify what page you are on in the lesson handout. Make use of big things to lead their attention to small things, i.e. in daily life “see the big clock on the wall? If you drop your eye straight down and just to the right…” is a clearer direction than “over there.”
- Build “bridges” in your lesson through the use of transitions and links to their past experience to help keep everyone’s brains gathered together and up with you!
- Use transitions such as “We’ve just covered the basic functions of charge, renew, return. Now we’re going to look at patron information and new card registration.” Tell them where they’ve been and where they’re going next, and it will help them to follow you more quickly and retain a mental outline and direction.
- Link your demonstration to their past experience, i.e. “This is when you would need to use this procedure,” or “This is what you would now do instead of (that) which you used to do.”
- Repeat questions before answering them, if there is buzz going on or you think people haven’t heard. Answers are always easier to understand and absorb, if the original question is known. When trainees miss the question, the answer often lacks context. Especially if it is information you really need everyone to hear, get their attention first, i.e. “Listen up, everyone, this is an important question.”
- Keep focused on your lesson plan and the order of the lesson segments. If a participant asks a question that will be answered later on in the lesson, defer the answer to the appropriate section, rather than getting side-tracked and off-schedule. You may invite the participant to ask again later if his/her question is not answered later in the lesson.
- If participants ask questions that go beyond the scope of the class, ask them to wait until the class is over or consult with Automation staff, rather than taking up class time on subjects too complex for this classroom setting.
- Create a safe environment for students of differing levels of ability to ask questions. Do this by continually reinforcing the message that questions are welcome. Encourage active participation. Ask people if you’ve completely answered their question.
- Be sensitive to the varying levels of ability by avoiding jargon and by avoiding assumptions about what people already know, i.e. not everyone is highly adept at windows shortcuts or procedures for logging in, if in their particular shift or duties, those are not things they use regularly. This doesn’t mean the whole lesson is geared to this, but you can be sensitive to not embarrassing people. Be prepared that the range of abilities may surprise you. Avoiding jargon is one of the most important things you can do to help people feel comfortable. Jargon leaves people out, and insures they will not ask, out of embarrassment.
- Though it will be a challenge to stay on schedule with so much to cover, try to give as much attention to the end of the lesson plan as to the beginning. The keys to this will be pacing, tactfully interrupting inappropriate diversions, and keeping the class together by verbally helping them visualize the “trail” down which you are leading them.

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TIPS FOR GUI COACHES

- Your role is a quiet one, working individually with those who fall behind.
- Watch screens and notice if someone is lost or heading in the wrong direction, perhaps without even realizing it.
- Observe the signs that someone needs help, i.e. turning to neighbors, looking around at other people's screens, not participating in practice, looking puzzled, desperately flipping through their handout, making eye contact with you, raising a hand to you. You should be watching screens and trainees throughout the class.
- Speak quietly while helping the person to catch up and get back on track.
- Whenever possible, help the individual get back with the class and leave them to follow along again with the class. Try not to end up giving a separate, simultaneous lesson throughout, since that is distracting and not a good use of your time. In rare cases, we might assign a one-on-one coach for some individuals. However, most students just need help getting over a stuck spot and want to be in sync with the class. They will feel most successful this way.
- Support the trainer in getting all participants to concentrate on listening and watching the screen in front during all demonstrations. If someone is using his/her computer during a demonstration, quietly suggest that it would be best to just observe while a demonstration is going on, and that there will be a chance to practice in a few minutes.
- If a class is having difficulty following the demonstrations, a coach could use the light pen to point to the areas of the screen the trainer is discussing so people may more easily follow each step as it is being carried out. A light pen may be found in the zipper pouch at the back of the Computer Lab Procedures notebook that is brought into the lab at the beginning of the class.
- The coach closest to the light switches may turn down the lights during demonstrations on the screen and turn up the lights for practice sessions.
- If a participant asks you a question that you think the whole class needs to hear, ask the trainer to address the question to the whole group.
- Keep focused on the lesson plan and the order of the lesson segments. If a participant asks you a question that will be answered later on in the lesson, assure him or her that that will be covered later in the lesson, and get them refocused on the current topic.
- If participants ask you questions that go beyond the scope of the class, ask them to wait until the class is over or consult with Automation staff, rather than taking up class time on subjects too complex for this classroom setting.
- Be sensitive to the varying levels of ability by avoiding jargon and by avoiding assumptions about what people already know, i.e. not everyone is highly adept at windows shortcuts or procedures for logging in, if in their particular shift or duties, those are not things they use regularly. This doesn't mean the whole lesson is geared to this, but you can be sensitive to not embarrassing people. Be prepared that the range of abilities may surprise you. Avoiding jargon is one of the most important things you can do to help people feel comfortable. Jargon leaves people out, and insures they will not ask, out of embarrassment.
- At the end of the session, assist in closing up the lab, locking the door, and returning all materials to the counter and shelf below the Reference schedules. Be sure the light pen gets back into the zipper pouch in the Lab notebook if it was used. (Except on Monday at 4:00 when PSC uses the lab immediately after. On that day, return all training materials and Lab notebook to Reference, but leave the door unlocked for PSC.)