

## ELECTRONIC RESEARCH SKILLS ASSESSMENT SURVEY AS AN INSTRUCTIONAL TOOL

BY DAVID SELDEN

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### Background

The National Indian Law Library (NILL), with a staff of three full-time-equivalent employees, serves as both a public library and a small law firm library. The library attempts to meet the Indian law information needs of the public by providing reference and research services and by developing a unique collection that includes, among other things, tribal codes and constitutions, legal pleadings from important Indian law cases, and hard-to-find reports and manuals dealing with Indian law issues. As a law firm library, NILL strives to anticipate and meet the informational needs of the Native American Rights Fund's (NARF's) 40 employees in three offices by providing reference and research assistance, current awareness service, research instruction, and other services typically provided by law firm librarians. Eighty percent of the employees work out of the Boulder, Colorado, office and the remaining 20 percent of the NARF staff work in satellite offices in Washington, D.C., and Anchorage, Alaska. An important goal of the library staff is to improve the electronic research competencies of the NARF attorneys, legal assistants, and other researchers through electronic research instruction. In order to meet this goal in the past, the law librarian has provided both one-on-one and small-group Westlaw® research instruction. Most researchers had either very basic or intermediate electronic research skills so it was easy to group people together with very similar skills. Currently, NARF has almost two dozen Westlaw password holders. With the recently negotiated Westlaw flat fee contract, the library has committed itself to raising our researchers' Westlaw search skills in order to take advantage of the efficiencies and cost savings

that the flat-fee arrangement allows. As the newly hired law librarian, I decided that one-on-one training would be the most productive method of instruction based on the assumption that the NARF researchers have varying electronic skills and the fact that the organization has a relatively small number of Westlaw users. Individualized instruction keeps attention level high, allows the trainer to customize instruction, and creates an environment where it is safer and easier for trainees to ask questions. As an added benefit, one-on-one training sessions would provide an opportunity for me to develop rapport with the researchers and demonstrate research expertise. For these reasons, I opted not to use free training support provided by the vendor.

### The Survey

In order to provide Westlaw instruction that would meet the diverse individual needs of NARF's researchers, I constructed and distributed a Westlaw self-assessment skills survey. Prior to developing the survey, I researched library and legal literature to find articles discussing electronic research self-assessment surveys. When no pertinent information was found on the topic, I asked other law librarians on several different electronic mailing lists if they had any experience in electronic skills assessment. Two law firm librarians graciously shared ideas on creating self-assessment surveys. Their examples revealed a difference in approach and assessment. Their surveys are identified as "Survey A" and "Survey B."

Survey A focused on assessing electronic research experience. The following is a sample question used:

"Have you ever used Westlaw for Windows®?"

Responses to choose from are "never/rarely, occasionally, frequently."

Survey B assessed specific LEXIS-NEXIS® skills in a multiple-choice format. The following is a sample question used:

"You need to review the full text of 11 USC 101. The most effective way to retrieve the statute is:

a) lexstat 11 USC 101, b) 11 USC 101, c) Statute 11 USC 101."

Since Survey A assessed experience rather than

specific skills or comfort level, I decided not to use it as a pattern. Although the style of Survey B might have served well because it surveyed specific skills, it did not assess comfort level, and the respondent had a one in three chance of guessing the right answer. While both surveys served a valuable purpose, they did not quite meet our unique needs, so I decided to design my own survey. The goal of the survey was to get an accurate assessment of the current Westlaw skills and comfort levels of NARF's researchers using a short, simple, and clear survey that would aid the instructor in tailoring instruction to meet individual needs. To construct the survey, I made a list of the basic and intermediate skills each researcher should possess; organized the skills into specific categories; and worded the survey questions and responses in a way that revealed the respondent's own level of skill and comfort on specific tasks.

The survey (see Appendix A) was distributed to researchers in all three NARF offices.

### The Training

After I issued a few reminders to return the survey, the survey response rate was close to 100 percent. Much to my delight, all surveys were properly filled out and complete. I decided to focus training efforts on specific skills that were marked "somewhat skilled" and "not very skilled" in the self-assessment survey. For all "highly skilled" responses, I decided to verbally confirm that the trainee had mastered those skills during the training session. For each question on the survey, two instructional exercises were designed that could be performed during the one-on-one training sessions. The plan was to present one exercise per skill and present the second exercise if more experience was needed. The training would consist of the researcher performing hands-on exercises while being coached by the instructor. One-hour training sessions were scheduled for each Westlaw user. I believed that anything longer than an hour would be overwhelming and unproductive. For those researchers needing more than an hour to complete the training, another appointment would be scheduled.

### Results of Training

Over a three-week period, I provided individualized training to NARF researchers, including telephone training to researchers in our satellite offices. The responses on the self-assessment surveys proved to be quite accurate. Trainees who checked the "highly skilled" box for a particular action generally were very competent in that area and people who checked the "somewhat skilled" and "not very skilled" boxes responded honestly and accurately too. The survey proved to be a big time-saver since I was able to focus the training on improving specific skills and technique while skipping over topics in which the researchers were proficient. By receiving feedback from the researcher in advance of instruction, I was able to prepare exercises that related to the researcher's particular practice areas. Feedback following each training session was very positive. In general, all trainees thought that the training was very relevant, focused, and productive.

### Conclusion

The self-assessment survey and the resulting training were a success. The survey results helped me focus on improving specific research skills, and the researchers benefited by learning important new skills in a short period of time. Self-assessment surveys such as this can be an important tool to any librarian interested in planning individualized electronic research instruction for his or her clientele.

## APPENDIX A

WESTLAW SKILLS  
ASSESSMENT SURVEY

In the next few months I will be providing individualized Westlaw instruction tailored to meet your needs. Please take a few minutes to fill out the self-assessment survey below to help me determine your current skill level, which will help me customize training.

**Please complete the survey below and return it to David by June 26, 2000, or ASAP.**

Assess your skill level in each of the following actions. Check only one box for each action.

Your Name:

## USING FIND

I can find and print case law and law review articles.

- highly skilled  
 somewhat skilled  
 not very skilled

I can find and print public laws, codified laws, and regulations.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to determine the correct abbreviation to use with the Find feature.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to determine whether Westlaw has the cited document I seek.

- highly skilled  
 somewhat skilled  
 not very skilled

USING TERMS AND  
CONNECTORS

I can use terms and connectors (&, /p, /s, /n, +n, etc.) to pinpoint my research with high accuracy.

- highly skilled  
 somewhat skilled  
 not very skilled

I know the difference between “/n” and “+n” as well as “!” and “\*”.

- highly skilled  
 somewhat skilled  
 not very skilled

USING SPECIAL WESTLAW  
FEATURES

I know how to quickly determine which database to search.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to determine the date coverage and comprehensiveness of any database.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to quickly review research tips for a specific database.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to access Westlaw via the Internet from any terminal while on the road.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to reduce costs by modifying print options.

- highly skilled  
 somewhat skilled  
 not very skilled

.....

I know how to view a list of legal authorities cited in a case on Westlaw.

- highly skilled  
 somewhat skilled  
 not very skilled

### MANAGING YOUR SEARCH RESULTS

I know how to save my research project to be resumed at another time.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to view or revisit any search results or "Found Documents" during my current session.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to send a document to a fax machine or a printer.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to print to an e-mail address or fax machine or download to a disk.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to cancel a print request on Westlaw.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to cut text from Westlaw and paste it into a WordPerfect® document.

- highly skilled  
 somewhat skilled  
 not very skilled

### SEARCHING USING FIELDS

I can use the "date," "words and phrases," "citation," and "synopsis" fields to pinpoint my case law research.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to find cases that have a particular West topic and key number.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to find cases that define a term.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to search for words in CFR section headings.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to limit my search results by date.

- highly skilled  
 somewhat skilled  
 not very skilled

### USING KEYCITE

I know what the \*\*\*\* mean in KeyCite®.

- highly skilled  
 somewhat skilled  
 not very skilled

I know how to use KeyCite to locate cases that cite my case in a particular jurisdiction relative to a West topic.

- highly skilled  
 somewhat skilled  
 not very skilled

THANKS FOR YOUR INPUT!  
 PLEASE RETURN TO THE LIBRARY ASAP.

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