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Checklist

Creating a Library Induction Programme for Trainees

Abstract: Suzanna Rickeard and Anne Coles describe the five key stages involved in devising a successful induction programme, based on their experiences at Lawrence Graham, a large London firm of solicitors and offer helpful hints on what any potential problem areas.
Keywords: legal research; trainee solicitors

"Legal research: Trainees should learn to find solutions by investigating the factual and legal issues, analysing problems and communicating the results of their research. They should be given work that makes use of traditional and computerised research tools and sources, business information and other relevant sources."

Training trainee solicitors: The Solicitors Regulation Authority requirements. 01/08/08

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Introduction

Research is an essential skill for all trainee solicitors, and the challenge for the law librarian responsible is to ensure that there is an established induction programme which will develop the trainees' research skills throughout the two years of their training contract. Creating a programme which covers all the necessary research skills, legal, commercial and more, means creating a programme which is often far removed from a traditional library induction.

Generic training on the key research databases should be offered, together with department related training. Critical appraisal, IT and search technique skills often need to be addressed, and a variety of training styles should be adopted to create a broad and responsive programme that will help create newly qualified solicitors who are capable of dealing with any research tasks thrown their way.

In this checklist we will cover five key stages involved in creating and developing a dynamic induction programme for trainees: planning, developing, writing, delivering and aftercare.

LG's induction programme

Trainee solicitors enter a training contract for two years at Lawrence Graham LLP [LG]. During this time they undertake four six-month placements, known as "seats" in four of the firm's seven departments. We organise an induction programme for an intake of around 25 trainees every September, with the 50 collective trainees then divided between the firm's departments.

We organise our main induction in the first week the trainees join the firm. They are split into two groups and for each group the induction covers two half-day sessions on consecutive days. For the first half-day session, we introduce the Information Resources team and give an overview of how the department can help trainees. We outline the standards for research at LG, touch on some basics of research, i.e. how to approach a research question and provide an introduction to the research resources on offer. In the second half-day session we give the trainees some real-life research tasks to complete, followed by a group discussion of their answers and research methods.

Further to this initial induction, we run detailed training sessions which include:

- Short, early morning sessions on specific legal research skills, such as updating cases or finding precedents, and how to use the resources available at LG to do this.

- Contributing to each department's induction programme to provide an overview of the department-specific resources available.
- Departmental Research Workshops giving the trainees hands-on experience of resources and common research tasks.

Our entire introductory course lasts on average six weeks and we repeat the departmental inductions every six months when trainees change their seat.

Creating an Induction Programme

We find that breaking down the creation and development of our induction programme into five stages helps us to concentrate on the varied elements involved. While you may find that these stages will not always present themselves in such a transparent manner, the following plan should serve as a good guide.

Stage 1: Planning

- Confirm how many trainees are arriving, who will be going to which department and when they will be available for training.
- Before they arrive, establish what legal research experience trainees have. We do this by sending them a questionnaire asking:
  - Which databases they have used
  - How well they feel they can use them
  - Their experience with search techniques.

Ascertaining this means that you do not spend too long on databases they are familiar with. For example, every year we find that trainees are increasingly proficient using LexisLibrary so you can focus on resources that are new to them. During sessions you may utilise trainees' experience with a particular resource by asking them to explain a process – a great audience participation technique!

- Get basic administrative tasks out of the way during this less busy period, such as sorting out passwords or access to your systems.
- Organising all the training sessions can be logistically challenging, so timetabling sessions as early as possible can save you problems in the long run.
- It is essential that you consider how much time you can afford to spend training, as you will need to balance this with the library workload. Remember that library enquiries may increase because many partners will not have a trainee!

Stage 2: Developing

- Talk to colleagues who can assist you with your training, such as PSL's and partners. These are the people who will be giving the trainees work to do, so ask them what they would like their new trainees to know and if they feel there are any gaps in your training.
- Think about what needs to be taught and how it can be effectively delivered in the time you have available. Ideally, an induction programme should aim to cover the following:
  - Relevant databases and online resources.
  - Hardcopy collections - journals and textbooks.
  - How to use key resources.
  - How to effectively utilise the library and its staff.
  - Basics of legal research-updating cases and legislation.
  - Confirming the authenticity of information - critical appraisal of web-based information.
  - Understanding research questions.
  - Selecting the right resources and sources to use.
  - "Know Your Partner" specifics - preferred research resources or methods of information delivery.
  - How to ask a partner for further information on a research question.
  - Practical experience of researching.
  - Department-specific resources and research questions.
  - Current awareness advice and how important this is for professional and business development.

Stage 3: Writing

- Always use the previous year's feedback to inform your programme and pay attention to what the trainees felt did and did not work.
- Make your training practical and interesting:
  - Do not make sessions too long. Think about how well you cope in lengthy training sessions, how easy it is to be distracted and how many breaks you need. Remember, it is very difficult to sit and be lectured at for several hours!
  - Think of innovative and motivating ways of delivering training. Over the years we have been moving away from static lectures and towards interactive or self-taught sessions, where trainees discuss research processes as a group and share knowledge.
  - Take advantage of e-learning tools; internet videos on Boolean searching have recently slipped in to our training.

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  - Remember, hands-on research is often a more effective learning technique than a lecture.
  - Think of ways to encourage audience participation.
  - Explain to trainees why they need to learn a skill, using work-related examples and research other trainees have been asked to undertake.
  - Your session may include both first and second year trainees, so encourage second years to share their experiences and their knowledge.
  - Ask a newly qualified solicitor who has been a trainee at the firm to give a short talk of their experiences. This helps to affirm trainee expectations and offers a chance for trainees to ask questions.

- Think about your training materials. Do not overwhelm the trainees with reams of material, as the chances are it will get lost or thrown away. Keep your handouts brief but informative. Our only handout is a quick reference matrix which shows what type of information is available on each database. This can be kept handy or pinned above their desk.
- If your firm has an internal KM system/intranet, it is best to use this as the repository for your training materials.

Stage 4: Delivering

- Practise your sessions! Just like any other presentation or speech, you need to take the time to familiarise yourself with your material and know the resource/s you are teaching well, as this will give you confidence in what you are saying.
- If you need notes to assist you, try and create something which you find easy to refer to e.g. subtle cue cards. Simply reading a full blown script or constantly referring to your notes can be distracting for attendees.
- Do a "getting to know you" ice-breaker when you first meet the trainees. We like "*what would you be doing if you weren't a solicitor?*"; last year's most popular job was, strangely, running a cake shop (perhaps the session was too close to lunchtime!). Take part in this yourself, as it is important for the trainees to get to know you too.
- You will be able to see people's differing abilities once you are in a session, so be prepared for a range of IT and search skill levels.
- Freebies and rewards can be a great way to motivate the trainees; ask your suppliers if they can provide some. In addition, good old-fashioned bribery with chocolate for anyone who volunteers an answer has never failed us. This can also help to create a more informal and interactive session.
- Remember that this is a two-year training process and you need to encourage the trainees to see you as both a valuable resource and as a source of support, so be approachable and relaxed in the sessions and supportive of anyone who is struggling.
- Highlight the risk involved in delivering poor research and thus how important it is that they learn the right research techniques. A verbal contribution from a senior partner or compliance manager may help to confirm this point.

Stage 5: Aftercare

- Be prepared to re-run training – no one will remember everything!
- Ask the trainees for detailed feedback on the induction programme as soon as it has finished. Encourage honesty and ask for suggestions of ways the sessions could be improved.
- Ask the trainees at the end of their seats if there are any other skills or resources they would have liked to have been taught. This helps to keep the training up-to-date and also benefits the next trainee.
- Keep your own training records so you can see how trainees are progressing. This will help when it comes to their next seat move, as this will help to determine if further training is required for their new seat.
- Work with your HR department and Trainee Partner to maintain records on trainees' attendance at your training sessions, and their developing abilities. This can be fed back into their formal appraisal process.
- It is also worth offering this training to newly qualified solicitors, especially if they are returning to a department they have not worked in for a while.

Conclusion

Research skills are an essential part of every solicitor's toolkit, as emphasised by the Solicitors Regulation Authority requirements quoted at the start of this article. Ensuring that solicitors can undertake research effectively using the correct sources is vital to reducing a law firm's exposure to risk through negligent advice, hence why a comprehensive trainee induction programme is crucial. Ensuring understanding of the resources available and of the needs both of the firm and of the trainee and ensuring that an induction programme reacts to current needs, means that you must interact with both your firm and with your trainees, continually inviting comments and feedback on the training you offer. Each year, resources change, the information needs of your firm change, and trainee skill levels change. Therefore, the only way to guarantee an effective induction programme is to constantly re-evaluate what you provide and reinvent the programme when required. Remember, what worked last year will not necessarily work this year.

Biographies

Anne Coles and Suzanna Rickeard are Information Officers at Lawrence Graham LLP, where they have created and run over a dozen annual induction programmes for new trainees. Anne is a committee member of BIALL's PR & Promotions Committee, and Suzanna is an Assistant Editor of the CLSIG Newsletter.

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Practical Matters

Getting the Most from a Database Trial

Abstract: A vendor launches what they promise to be a fantastic new product which you can not do without so you set up a trial. At the end of the trial you have lots of well-balanced feedback from across your organisation that you can use to determine whether or not to take the product and which also gives you some points for negotiation. Well, that is the theory anyway! In this article Chrissy Street aims to give some guidance about how to get closer to this in practice.
Keyword: online databases

First steps

Appoint a trial manager. The person can vary for each trial but it means that there is someone responsible for the trial and all tasks relating to it.

Establish what it is you will be trialling by asking for details from the vendor prior to any meeting. This should include: a product description, potential benefits of subscribing, any technical specification, licence model, terms and conditions, pricing, account management contact details, trial parameters, e.g. how long, any restrictions, etc.

Hold an initial demonstration of the product for one or two interested parties to assess the content and functionality of the product including authority and currency of the materials and knowledge of the vendor contact. There is no point in trialling a product if the part you are interested in is not fully available, or if the product does not meet expectations. It is also useful to ensure that the vendor contact is able to give a comprehensive and knowledgeable demonstration of the product without being too sales focused.

Obtain approval for the trial from the budget holder/s. It is not good practice to enter into a trial if there will be no funds to purchase the product. The budget holder/s approval may also affect the trial's timing. For example, if the budget for the current financial year has already been committed, the trial may need to wait for a few months.

Identify your trial group. Know which groups will be taking part in the trial. Establish your champions within the group. These are people who have a key interest in the product and will actively encourage participation and feedback. Consider holding a demo for them prior to starting the trial.

Planning the trial

Think about when you will hold the trial, how long you will trial it for, what communications you will send, what training you will arrange, how you will gather feedback and how you will conclude the trial. You should also start to implement your pre-subscription procedures, such as reviewing the terms and conditions, in order to be in a position to move to a full subscription if required.