



2-28-2022

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Seeking Collaborative Instruction Models beyond the Pandemic: Lessons Learned from the JapanKnowledge Workshop Series hosted by the Plains to Pacific Alliance

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Introduction

JapanKnowledge (JK), provided by NetAdvance Inc., is a reference/e-book database covering a wide variety of content. JK is one of the most popular databases for Japanese Studies among university libraries in North America. The Plains to Pacific Alliance (PPA) is an ad hoc consortium that subscribes to this database; currently, 11 mid-to-small-sized libraries from the Midwest to the Pacific Region participate in this consortium. The Japanese/East Asian Studies library PPA members arrange group trials and purchases for JK's new add-on content. In 2021, some of us in the PPA member libraries formed a Working Group (WG) and organized a series of online workshops for JK. During the COVID-19 pandemic, online conferences, meetings, and workshops have thrived. This "new normal" gives librarians opportunities to collaboratively organize workshops for larger audiences beyond their institutions.

Nevertheless, hosting such events requires careful planning and preparation among organizers when they are all in different institutions. For those who plan to host online workshops collaboratively, this report shares our experiences organizing and holding this JK Workshop series.

Background

In 2009, several libraries in the PPA decided to organize workshops jointly and requested NetAdvance to dispatch a qualified instructor to our institutions. As a result, an instructor, fluent in English, visited each library to provide customized workshops. Since then, JK has upgraded its system and added new features. Although JK is a subscription database, some publishers started to provide e-books as optional content in JK. Inevitably JK has become more complicated to use, and PPA member librarians deemed it imperative to provide learning opportunities for both themselves and their library patrons. Based on the previous experiences, member librarians planned to collaborate

with NetAdvance to host traveling workshops in 2020. However, due to the COVID-19 pandemic and resulting lockdowns, the plans were postponed.

Meanwhile, the lockdown forced almost every higher education institution in North America—and the world—to move to online instruction. Zoom, a video conferencing software, became a standard platform for online communication. In the fall of 2020, some PPA member librarians began forming the idea of holding online workshops on JK. By February 2021, librarians with primary job responsibilities pertinent to Japanese Studies formed a WG.¹ In addition to using e-mail for immediate communication, we held meetings via Zoom. We maintained all related documents such as a timeline, promotional materials, and instructional slides, in online shared folders. The workshop was tentatively scheduled for late September to early October of 2021, though details were still undecided.

Planning and preparation

Preparation for content creation: spring workshop for librarians

To reach out to a broader audience, the WG decided to conduct the workshop in English. Although the initial plan was to invite a qualified instructor from NetAdvance, we soon found that NetAdvance lacked trained instructors fluent in English. In addition, their instructional slides prepared for English speakers were outdated. Therefore, we decided to provide instruction and create our original contents to present. To create updated instructional content, we requested NetAdvance to host a two-day online workshop on April 7-8. This workshop intended to cover: An introduction to JK's new features and services, answers to the questions submitted by the WG in advance, and an introduction to *Fūzoku gahō*, one of the optional contents offered by JK. We chose this content because many PPA libraries had purchased this collection jointly.

The WG invited other librarians to this workshop through eastlib and JpnLibLiaisons, two major e-mail distribution lists subscribed by Japanese/East Asian librarians. The invitation to librarians offered the ability to attain a better understanding of the community of Japanese/East Asian Studies librarians and to determine interest in online training opportunities for both librarians and patrons. The NetAdvance workshop for which

¹ The participating libraries are: University of Colorado at Boulder, University of Hawai'i at Manoa, University of Kansas, University of Oregon, University of Washington, Washington University in St. Louis. The librarian from the University of Iowa later joined as a liaison from the Outreach Working Group, the North American Coordinating Council of Japanese Library Resources.

invitations were sent had approximately 20 Japanese/East Asian Studies librarians as participants. The attendees learned about updates and new features through this workshop and had a lively discussion. Though “Zoom fatigue” has become a popular term, it was clear that videoconferencing was a valuable tool enabling librarians to communicate and exchange information casually.

After reviewing the experiences and feedback from the participants, the WG decided to host two different levels for the workshop. An introductory workshop offered on September 29 then repeated on October 5 targeted new graduate students and faculty unfamiliar with JK. On October 21, an advanced workshop focused on those with experiences using JK who might be interested in learning about newly added content. NetAdvance agreed to provide the workshop participants free access to JK including optional content. The arrangement enabled the workshop to be promoted to a broader audience beyond the PPA libraries.

Promotion: collaboration with the North American Coordinating Council on Japanese Library Resources

Many institutions with large Japanese/East Asian language collections subscribe to JK. Although their librarians provide users with database instructions, the WG wanted to welcome anyone interested in our training. Also, because the workshop would be online, the WG realized we could connect with researchers who did not have institutional access to JK and provide informational and educational opportunities to them. With these considerations, the initially planned workshop for PPA library users was expanded to anyone interested in the opportunity to learn more about JK. The PPA, an ad hoc consortium, was not in a good position to host workshops beyond the users of PPA libraries. Because of this, the WG turned to the North American Coordinating Council on Japanese Library Resources (NCC) as an ideal collaborator to organize the workshops. The NCC has a long history of offering a variety of workshops to Japanese Studies librarians and researchers, thus having developed strong networks in North America and beyond. Collaboration with NCC’s Digital Media Manager enabled the WG to reach a broader audience using multiple strategies.

- **Creation of a digital flyer:** In any communication channel, a distinctive visual image will appeal to the potential target audience by making the workshop series seem attractive to them. The WG obtained a permitted image to use from NetAdvance and created a digital flyer with NCC’s Digital Media Manager. The digital flyer was placed at the top of the text announcement to visually attract readers.
- **Promotion to librarians:** The WG posted the workshop announcement to several e-mail distribution lists, such as eastlib, JpnLibLiaison, and the Hawaii Library Association, asking them to share

the announcement with the potential users in their institutions. We scheduled the initial announcement to be distributed three weeks before the first workshop and sent a final reminder one week before each workshop. Furthermore, the WG identified an appropriate person at each institution subscribed to JK and sent out the same e-mail directly to inform them about the workshop series.

- **Reaching scholarly communities:** To reach the communities of Japanese Studies researchers, the WG posted workshop announcements to such scholarly online forums as H-Japan, Pre-modern Japanese Studies, and Japan Research Forum. NCC's Facebook and Twitter were also valuable platforms to directly appeal to Japanese Studies researchers. This course of action was chosen with the understanding that the promotions on SNS would percolate through the home institutions of the individual recipients. This would further broaden the reach to individuals with no prior experience in JK resulting from absent institutional access.

Registration strategy and profile

Registration strategy and problem

As mentioned, NetAdvance provided the workshop participants with free-of-charge access to JK. This generous offer, although likely increasing and attracting registrants, may not have impacted the workshop's attendance. Instead of releasing the access information within the workshop announcement, the WG provided the information in the registration confirmation message and shared it only with the individuals who completed the registration process. The WG used Google Forms and created a registration page for the three workshops in one of the organizing institution libraries' LibGuide sites.

The primary reason for using Google Forms was that Zoom's registration form lacked the flexibility to meet our needs. The WG would like to note that Zoom's license caused obstacles to our collaborative project. To aid and simplify the process for the host institution, the WG members divided the tasks among several institutions and assigned one institution to host the events and another institution to manage their registrations and surveys. However, these two institutions retained separate licenses with Zoom and could not manage one another's meetings. While Zoom works well when a single institution hosts an event from the registration through completion, problems will arise when multiple institutions want to take roles within Zoom.

Registration profiles

Registration for all three workshops began on September 8, three weeks before the first introductory workshop on September 29, and closed three days prior to each workshop. Registered participants received a reminder with the Zoom link two days before their workshop.

In total, we received 259 registrants for the two introductory workshops. On average, 56% of registrants attended the workshops. In the advanced workshop, 174 people registered out of which 42% attended.

Table 1 shows the status of the registrants. Over 30% of registrants were instructional faculty or independent scholars, followed by graduate students and then librarians/information specialists.

Table 1. Registrants' status.

Introductory Workshops		Advanced Workshop	
Instructional faculty/Ind. scholars	31.0%	Instructional faculty/Ind. scholars	36.0%
Ph.D. students	22.0%	Librarians/Information Specialists	20.6%
Librarians/Information Specialists	17.7%	Ph.D. students & Post Doc	20.5%
M.A. students	16.0%	MA students	12.0%
Undergraduates	3.0%	Undergraduates	3.4%
Other	10.3%	Other	7.5%

Table 2 focuses on areas of study and research interests. History and Language & Literature were the most prominent areas for the introductory and advanced workshops. (The respondents were able to make multiple selections.)

Table 2. Registrants' area of study.

Introductory Workshops		Advanced Workshop	
History	37.4%	History	41.2%
Language & Literature	32.8%	Language & Literature	35.8%
Library/Information Science	18.0%	Library/Information Science	22.4%
Art & Art History	15.0%	Art & Art History	17.6%
Sociology/Social Sciences	14.6%	Religion	16.4%
Religion	9.2%	Sociology/Social Sciences	15.2%
Film studies	9.0%	Film studies	9.0%
Anthropology	8.4%	Performing Arts	8.5%
Performing Arts	6.9%	Anthropology	7.3%

The subscription status of each institution shows that 54.8% had institutional subscriptions at the time of the introductory workshops and 68.8% for the advanced workshop participants (Table 3). It should be noted

that over 30% of the participants in the introductory workshops did not know whether their institutions subscribed to the database.

Table 3. Institutional subscription status.

Introductory Workshops		Advanced Workshop	
Institutional subscription yes	54.8%	Institutional subscription yes	68.8%
No institutional subscription	9.6%	No institutional subscription	12.9%
Do not know	33.2%	Do not know	18.2%

As for familiarity with the database, over half of the registrants for the introductory workshops had no prior experience, while over 40% of the advanced workshop participants had several years of experience (Table 4).

Table 4. Participants' years of experience with JK.

Introductory Workshops		Advanced Workshop	
1-2 years of experience	19.6%	1-2 years of experience	20.7%
3-5 years	10.8%	3-5 years	17.2%
5+ years	10.0%	5+ years	27.2%
No experience	56.7%	No experience	34.9%

Content creation and evaluation

Introductory workshop: content customized by librarians, not database providers

The WG members created the instructional texts as well as slides. One member served as the instructor for both introductory workshops and used Zoom's shared screen function to show the instructional slides and perform live demonstrations.

The main purpose of the introductory workshop would be to show search functionality, focusing on simple and advanced search tools. It was also important to show and highlight certain reference works and other eBook collections in JK. The instruction scenario adopted hypothetical user stories depicting researchers and graduate students exploring topics of interest. Search features and the unique content of several significant sources would be integrated into these stories. These stories include a graduate student or researcher interested in:

- finding resources on *jōruri* (浄瑠璃).
- the history of Japanese radio dramas.

- learning more about the religious sites that Matsuo Bashō (松尾芭蕉) visited and how they relate to his poetry.
- researching the history of marriage in Japan before and after the Meiji Restoration.
- studying classical Japanese for the first time. the intertextual history of earthquakes through classical Japanese literature.

Searches and demonstrations of special features in JK were created around the above six stories. Demonstrations were designed to be shown on several static slides and demonstrated live in the database. Throughout the presentation, the instruction stressed three skills: 1) creating good keywords, 2) using search features such as headword vs. full text, Boolean searching, as well as matching functionality: match the beginning of a text string, or the end, or any part and 3) becoming familiar with each major content in JK and effectively filter search results. Most of the stories prepared for the demonstration combined searching in a commonly used reference work and incorporating a lesser-known reference resource that a researcher might not realize was available in JK. This approach made it possible to present a large variety of content, search strategies, and “hidden gems” in a short amount of time.

To tune the introductory workshop to those who were new to JK or had limited experience, the WG carefully designed our instructions and modified them as we reviewed them during the preparation. For example, we originally intended to name resources in Japanese, as students would need to learn the Japanese titles of essential reference works for their studies. However, we expected that the audience would be quite diverse in terms of Japanese language ability; hence Japanese titles and terms were explained in English to accommodate all viewers. Also, a common mistake when using JK is forgetting to clear filters from a previous search. For this reason, “mistakes” were intentionally built into the presentation. During a new search, the filters were intentionally “forgotten” from the previous one to demonstrate unusual results, and then fixing the problem by clearing the search filters.

The second introductory workshop incorporated the feedback from the attendants of the first one. The useful suggestions included talking speed, especially for Japanese words, and avoiding words such as “here,” instead of clearly pointing out the object on the screen. The mouse cursor via Zoom’s shared screen looked small (even though the instructor changed the size and color of the cursor), so the instructor made sure to highlight the object. Zoom’s

highlighting tool was useful to “draw” on the presentation and highlight specific texts and features. In addition to these technical changes, we also revised teaching contents. As one example, the style of citation generated by JK’s citation function does not follow any common styles used in North America. After reviewing the feedback on citations, we decided to clarify this problem and suggested using the function only to keep track of notes and sources.

Advanced workshop: concurrent programs to meet different needs

The advanced workshop used Zoom’s breakout room function and offered two concurrent programs, a “Publishers’ Talk” room and a “Researchers’ Talk” room. The Publishers’ Talk followed the program of the NetAdvance workshop offered for librarians, and a representative from NetAdvance shared new features and plans for future projects. Two publishers presented their optional e-content, available as a one-time purchase. However, the publishers planned to speak in Japanese, and their contents were subject-specific and did not necessarily meet everyone’s needs. The WG members were also concerned that if the content of the Publishers’ Talk became too commercial or promotional, they might not be suitable for the educational purpose of the workshop series. To correct the course of the advanced workshop, the WG decided to provide another program, a Researchers’ Talk room. Six researchers were invited to share their experiences in using JK for their research and what discoveries they had made. The expectation was that real research examples demonstrated by experienced JK users would encourage the participants to explore more on their own.

To facilitate users moving between the two breakout rooms, we divided the programs into three sessions. At the beginning of the workshop, the primary host introduced the structure of the workshop, then briefly explained the content of the presentations in the two breakout rooms. The participants could then choose the room they would like to attend. Other organizers joined in the breakout room as co-hosts while the primary host stayed in the main room to direct the late-arriving participants. The primary host closed the breakout rooms after 25 minutes and called all participants back to the main room, then gave a brief introduction to the content of the next session. By using breakout rooms, the advanced workshop was able to meet the diverse needs and interests of the participants.

Making the workshop open access or not

Introductory workshop: collaboration with NCC

The WG planned to record and make this workshop series available for those unable to attend the workshop. Also, we hoped that librarian colleagues would find it useful for their instruction activities. We could not pursue this plan without collaborating with the NCC's Outreach Working Group (OWG), which created instructional video clips for NCC. A member of the OWG joined us as a liaison to edit and upload the video recording. The WG decided to use the recording of the second introductory workshop since the contents and presentation style was modified after reviewing the feedback of the first introductory workshop. The OWG edited the video recording and eliminated the post-workshop Q&A session in consideration of participants' privacy and the convenience of viewers. Also, the "CC BY-NC-ND video bumper" was added at the end of the recording for the Creative Commons License CC BY-NC-ND 4.0. One week before the advanced workshop, a 62-minute instructional video, the presentation slides, and other related information were uploaded to the OWG's LibGuide page: <https://guides.nccjapan.org/outreach/jkworkshop>.

However, the WG would like to call attention to the technical difficulties we experienced regarding recording the Zoom meetings. Users can use Zoom Cloud to record the meeting and store online or record and save to users' own devices. However, neither cloud nor local recordings were adequate when creating instructional videos for public use. The primary host recorded in the Zoom Cloud for the first introductory workshop then downloaded it to a local PC for editing. However, the downloaded recording got separated into multiple video files, such as active speaker, gallery view, and shared screen. We found it challenging to recreate the atmosphere of the live workshop in which a viewer could see the instructional slides on the shared screen and the active speaker at the same time. The primary host saved the recording to a local PC for the second introductory workshop. However, the local recording always showed a thumbnail gallery view with the shared screen. Although we included the instructor's screen, other participants' faces also appeared in the recorded outcome, which was not desirable for the participants' privacy. Therefore, when we decided to use the recording of the second workshop to create an instructional video, the OWG had to mask the participants' faces in the video editing process so that only the instructor's face was left on the screen.

Advanced workshop: Setback

The WG originally planned to record both breakout rooms. Because the participant needed to choose one of the two rooms, making all presentations accessible seemed ideal for those who would like to watch the presentation concurrently held in the other room. Since cloud recording was not available for the breakout rooms, co-hosts in the breakout rooms were assigned to record the presentations locally and share them with the OWG liaison for editing and uploading. However, the WG had to abandon the idea of video recording. The major obstacle was a potential copyright violation. As a part of their presentations, many researchers used copyrighted materials, such as images taken from online exhibitions and collections from their affiliate institutions. Using copyrighted materials for a conference with a limited number of attendees is an acceptable practice, but making such presentations available via NCC's website would be beyond the scope of fair use. Also, the NCC required every participant to sign a release form to permit NCC's use of the video recording for any purpose. Some speakers found this statement overly broad and problematic. The WG tried to find a secure way to release the video clips to those interested. However, given the possibility that the video recordings might be downloaded, edited, and used without the presenters' knowledge, the WG eventually had to abandon the plan to record the presentations.

Post-workshop surveys

The WG used Google Forms to create the post-workshop surveys, distributed the survey link through Zoom chat during each workshop, and sent a reminder with a one-week deadline immediately after the event. However, the response rates were much lower than the organizers hoped: 33.7% for the first introductory workshop, 20.6% for the second, and 32.4% for the advanced workshop.

Although the response rates were low, most of the participants across all the sessions expressed the opinion that the workshops met their expectations (Figures 1-3), and the workshops' length was adequate (Figures 4-6).

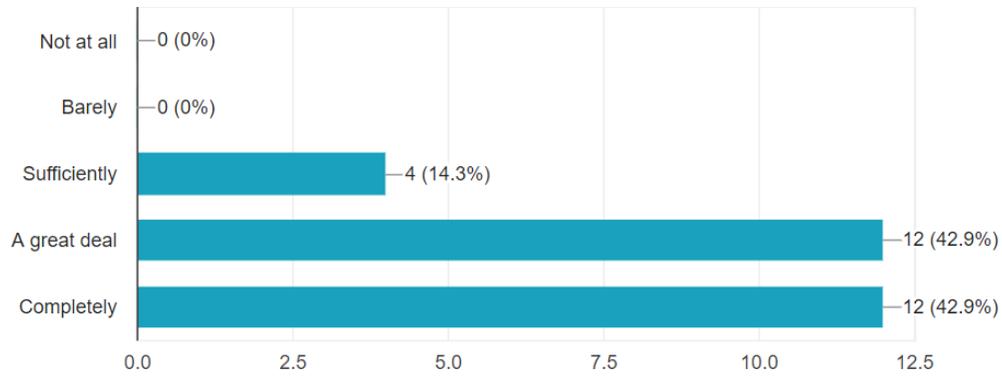


Figure 1. Introductory Workshop on September 29, 2021. Responses to the question: Did the JapanKnowledge workshop meet your expectations?

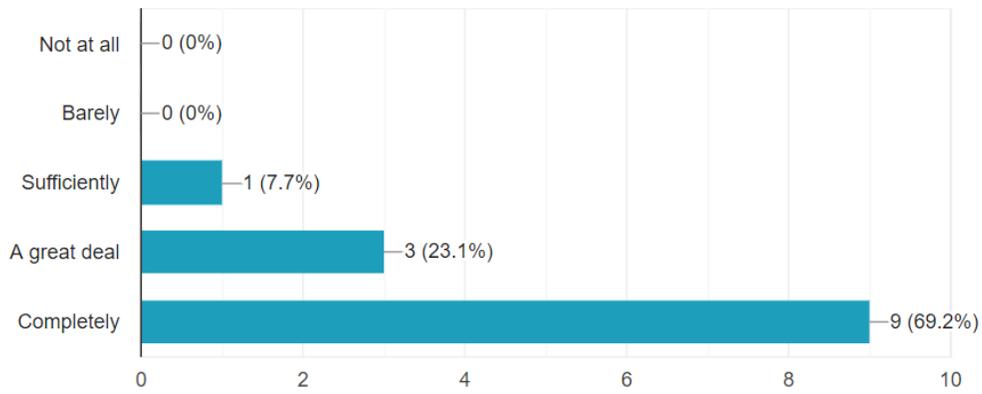


Figure 2. Introductory Workshop on October 5, 2021. Responses to the question: Did the JapanKnowledge workshop meet your expectations?

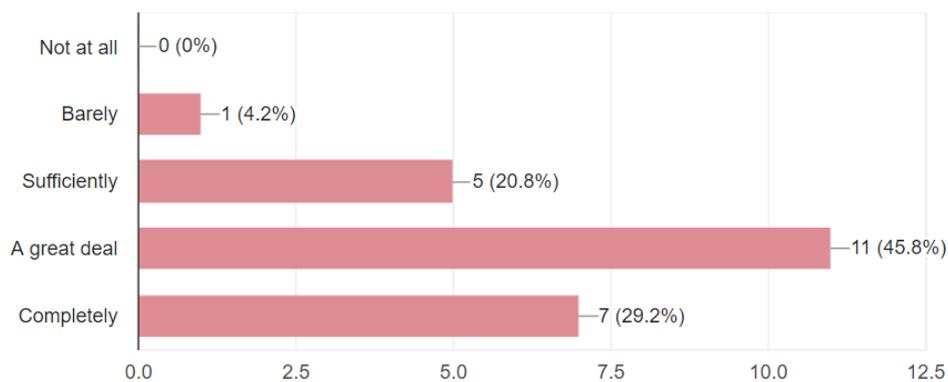


Figure 3. Advanced Workshop on October 21, 2021. Responses to the question: Did the JapanKnowledge workshop meet your expectations?

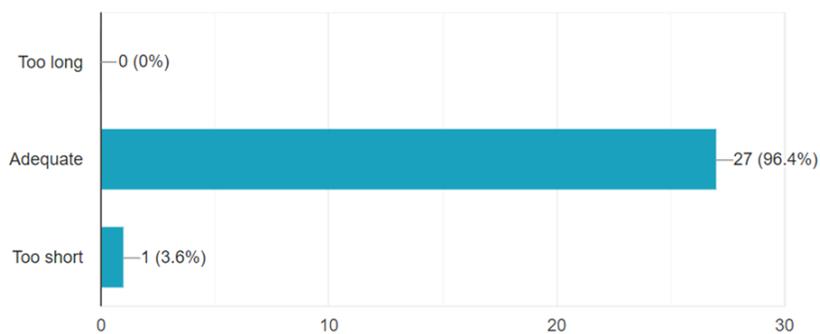


Figure 4. Introductory Workshop on September 29, 2021. Responses to the question: Was the length of the workshop adequate?

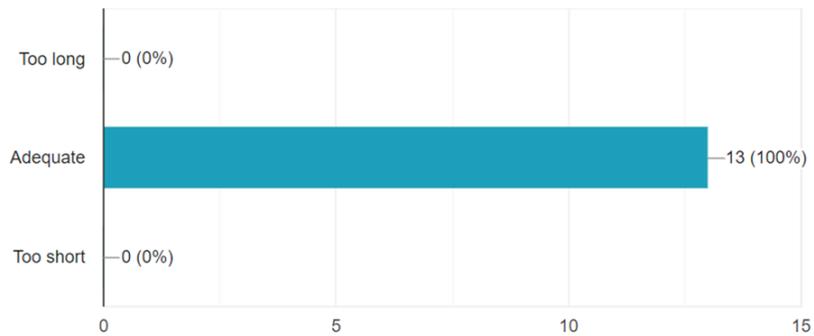


Figure 5. Introductory Workshop on October 5, 2021. Responses to the question: Did the JapanKnowledge workshop meet your expectations?

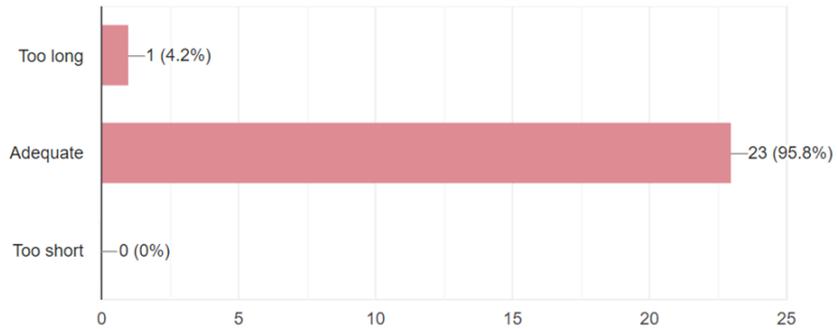


Figure 6. Advanced Workshop on October 21, 2021. Responses to the question: Did the JapanKnowledge workshop meet your expectations?

For future reference, we noted that the announcement via mailing lists seemed the most effective way to announce the workshops (Figures 7-9).

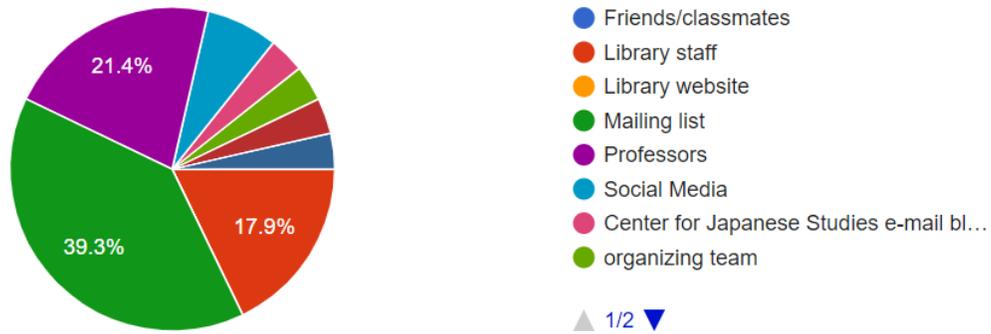


Figure 7. Introductory Workshop on September 29, 2021. Responses to the question: Where did you hear about the event?

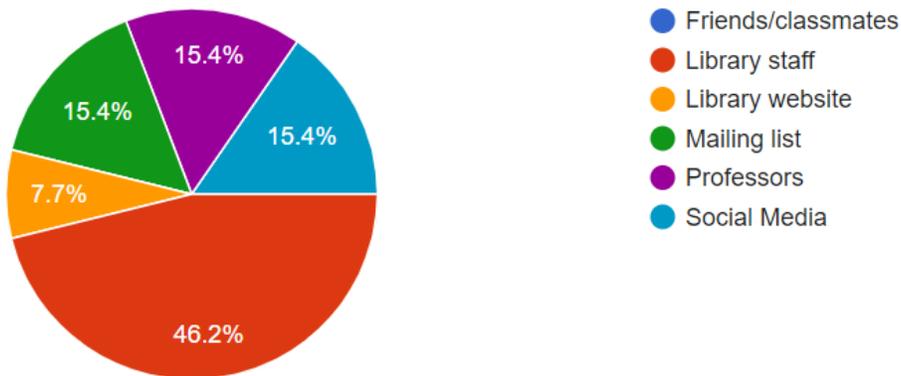


Figure 8. Introductory Workshop on October 5, 2021. Responses to the question: Where did you hear about the event?

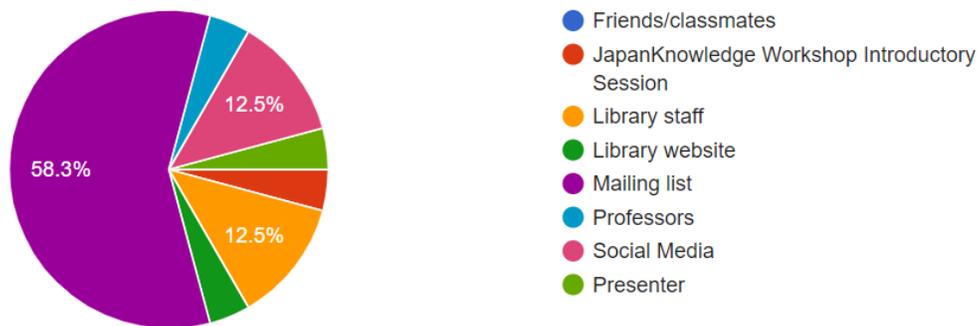


Figure 9. Advanced Workshop on October 21, 2021. Responses to the question: Where did you hear about the event?

Lessons learned and issues unresolved

Through organizing this workshop series, the WG members learned many lessons and faced complicated issues. We have described some of them already, but we would like to add our thoughts on this workshop series and other challenges for those organizing online workshops.

- **Librarians as database instructors**

Although we originally planned to ask NetAdvance to send a qualified instructor, we eventually decided to provide instruction ourselves. We found it more effective and worthwhile because we could customize our instruction for the targeted audience and revise the content after receiving feedback from the first workshop. Although it took time and energy, it was worthwhile creating instruction content by ourselves rather than depending on the one provided by the vendor.

- **The distinction between education and sales promotion**

The original audience for this workshop was the patrons of PPA libraries, which jointly subscribed to JK. However, we decided to open the workshop to anyone interested in learning about JK, and this resulted in a dilemma since the database we featured was a commercial database. So we faced the question of whether it was appropriate for us librarians—fair and unbiased liaisons for the researchers—to offer workshops for a particular commercial database. This problem became apparent during the advanced workshop when invited publishers touched on the prices of the add-on content they provide to JK. Moreover, we were able to provide the workshop participants with the opportunity to use JK. Though this arrangement was beneficial for potential users, the commercial database provider also received publicity despite similar/competitive databases being available to researchers. We firmly believe in the value and importance of providing such training and opportunities from our experiences in hosting this workshop and the feedback from our participants. However, it is crucial to distinguish between education and sales promotion in any workshops planned by librarians, especially when dealing with commercial databases. The differentiation remains an unsolved issue, but it is important to work closely with each participating publisher/vendor to agree on what is to be covered in workshops and what is to be avoided in their presentations.

- **Low post-workshop survey response rates**

The post-workshop survey response rates were disappointingly low—around 30%. The responses were informative and would be useful for

future events. It is important to explore a more effective way to solicit feedback from the attendants.

- **No tool is perfect**

Concerning the problem mentioned above, Zoom does allow the host to present a survey to participants once a meeting has ended. Also mentioned previously, Zoom does not allow multiple institutions to manage one meeting, in this case, letting one institution host a workshop while allowing another institution to create surveys. PPA members were not under the same Zoom license, and so as a group, we could not manipulate the meeting's settings. We found these limitations while planning and rehearsing the workshops. Therefore, our advice is: during the early stages of planning, get familiar with the features and limitations of the tools you are going to use. No tool is perfect.

- **Do not over-rely on technology**

It was fortunate that the internet environment was stable and smooth during the workshop series. However, when using technology unexpected problems are always possible. In our case, we used the breakout room function to host two different programs. Although the breakout room setting allowed participants to choose and enter the breakout room of their interest, some were not able to choose because of technical issues. The host had to assign the individual participant to their desired room manually. Although using breakout rooms is ideal for hosting various programs concurrently, managing breakout rooms requires special attention. When organizing an online workshop, keeping the structure as simple as possible is recommended.

Conclusion

Before the outbreak of the COVID-19 pandemic, platforms for videoconferencing were already available, but the pandemic made online conferences a standard communication tool. This academic "new normal" will likely remain even after pandemic subsidies expire. This online environment gives librarians more opportunities to collaboratively organize workshops for larger audiences beyond their institutions. This workshop series is one such attempt and we hope our experience helps others to organize successful and innovative projects collaboratively.