

Interview sheet for the Heuristic Task Analysis Method

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Phase I - Prepare.

1. Prepare
 - Nice office...
 - The process we will be using...
 - Describe the task to me in general.
 - Describe the people who will be performing this task
 - What are the main costs and constraints in terms of teaching people how to do this task?

Phase II - Identify the first learning episode.

2. Identify the simplest version of the task and simplifying conditions.
 - Recall the simplest case of you doing this task. Describe it very briefly.
 - What conditions distinguishes this version of the task from more complex versions?
 - Let's identify some major versions and any conditions that distinguish them.
 - Is this the simplest, most representative task?
 - How representative of the task is it? Does this example occur frequently? Is it going to be safe to do in training?
 - Is this a fairly complete list of the simplifying conditions?
3. Analyze the organizing content (mostly heuristics and descriptive theories)
 - Think of a **specific time** you performed this task.
 - What are some key **decisions** you made?
 - What **knowledge** did you draw upon to make this decision? (What were you thinking when you made this decision?)
 - **Steps?** (procedural knowledge)
 - Descriptive models? (which describe the phenomena with which the SME works)
 - When you performed the task, what things were you dealing with?
 - Can you think of any sort of cause/effect relationships for those things, phenomena?
 - Multiple causes, multiple effects?
 - Chains of causes and effects?
 - What are the probabilities for these things happening?
 - **Guidelines?** (heuristic knowledge)
 - What are the goals for this instance of the task under the conditions we talked about?
 - What important considerations did you have in achieving the goal(s)?
 - What are the main things you had to consider or pay attention to get achieve the goal(s).
 - What are the critical events and inputs you have to do or think about to deal with each consideration?

- What sort of guidelines or rules of thumb would help someone handle this consideration?
 - **Explanatory models?** (why the guidelines work)
 - Why do you think this guideline works?
 - Are any of the guidelines interrelated?
 - What do you think are the reasons that these guidelines work?
 - What's the probability of each of the critical events happening?
 - **Metacognitive/decision rules?** (when to use which steps, guidelines, and descriptive knowledge).
 - How did you decide when to use these guidelines/rules while you were working on this task?
 - Recall a similar example of this task that constitutes the same type of version of the task. Go to beginning of Step 3.
4. Analyze supporting content.
 - What additional information, understandings, skills, & affective qualities are required to do this version of the task?
 - Let's analyze this knowledge in terms of what people will have to learn to do the task.
5. Adjust episode size.
 - How much time should one class/learning session last?
 - Do you think this is the right amount of material for one session?
 - How much should we include?
6. Design the within-episode sequence
 - Is this material in the order it will be used?
 - Have we left any prerequisites out or gotten them out of order?
 - Is there anything else they need to know before trying any parts of the task?
 - Does the material seem to be grouped together well?

Phase III - Identify the next learning episode.

- 7. Identify the next simplest version.
 - Let's rank the simplifying conditions we have in order of complexity.
 - What do you think might be the next simplest version of the task?
 - What do you think would be the best simplifying conditions for this version of the task?
- 8. Repeat steps 3-7 to identify all remaining versions of the task.