Reference Text Project Rubric – Exploded View

Project Purpose

The purpose of this project is to give librarians feedback on virtual reference skills such as listening/inquiring, searching, interest, and follow-up. RUSA has identified each of these skills as important guidelines for behavioral performance of reference and information service providers.

Rubric Purpose:

The purpose of this rubric is to provide measurable criteria to assess the text message reference skills of professional academic librarians for the last 3 calendar years. Results of this rubric are intended to be used as a teaching/training tool to communicate expectations and give informative feedback. The assessment goal is to improve the performance of professional librarians in the area of text reference message service at Newton Gresham Library.

http://www.ala.org/rusa/resources/guidelines/guidelinesbehavioral

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	Accomplished - 3	Developing - 2	Beginning - 1

Listening/ Inquiring
 	
The reference interview is the heart of the reference transaction and is crucial to the success of the process. The librarian must be effective in identifying the patron's information needs and must do so in a manner that keeps patrons at ease. Strong listening and questioning skills are necessary for a positive interaction.
	1. Communicates in a clearly receptive/cordial/ encouraging manner
	
	2. Uses concise language, abbreviations if appropriate, limiting responses to one text message (or 160 characters) per patron query
	
	3. Uses open-ended questioning techniques if appropriate to encourage the patron to expand on the request or present additional information. Some examples of such questions include:
	   -Please tell me more about your topic.
	   -What additional information can you give me?
	   -How much information do you need?
	
	4. Uses closed questions if appropriate to refine the search query. Some examples of clarifying questions are:
	   -What types of information do you need (books, articles, etc.)?
	   -Do you need current or historical information?
		1. Communicates in a receptive/cordial/ encouraging manner
		
		2. Uses concise language, abbreviations if appropriate, limiting responses to no more than two text messages (or 320 characters) per patron query
		
		3. Does not use open-ended questioning techniques even when appropriate to encourage the patron to expand on the request or present additional information.
		
		4. Uses closed questions to refine the search query. Some examples of clarifying questions are:
		   -What types of information do you need (books, articles, etc.)?
		   -Do you need current or historical information?
			1. Communicates in an abrupt manner
			
			2. Does not use concise language, sending responses that exceed two text messages (over 320 characters) per patron query
			
			3. Does not use open-ended questioning techniques even when appropriate to encourage the patron to expand on the request or present additional information.
			
			4. Does not use closed questions to refine the search query.

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Interest			
Interest A successful librarian must demonstrate a high degree of interest in the reference transaction. While not every query will contain stimulating intellectual challenges, the librarian should be interested in each patron's information need and should be committed to providing the most effective assistance. Librarians who demonstrate a high level of interest in the inquiries of their patrons will generate a higher level of satisfaction among users.	1. An automatic response acknowledges user questions submitted outside of library operation hours (hours during which the library is open) 2. Provides an initial response to the patron in 30 minutes or less during library operation hours (hours during which the library is open) 3. Responds to follow-up questions, if appropriate, in 30 minutes or less during library operation hours (hours during which the library is open)	1. No automatic response acknowledges user questions submitted outside of library operation hours (hours during which the library is open) 2. Provides an initial response to the patron in a timely manner, between 30 and 60 minutes during library operation hours (hours during which the library is open) 3. Responds to follow-up questions, if appropriate, between 30 and 60 minutes during library operation hours (hours during which the library is open)	1. No automatic response acknowledges user questions submitted outside of library operation hours (hours during which the library is open) 2. Provides an initial response to the patron after more than 60 minutes during library operation hours (hours during which the library is open) 3. Responds to follow-up questions, if appropriate, after more than 60 minutes during library operation hours (hours during which the library is open)

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Searching			

Searching
 	
The search process is the portion of the transaction in which behavior and accuracy intersect. Without an effective search, not only is the desired information unlikely to be found, but patrons may become discouraged as well. Yet many of the aspects of searching that lead to accurate results are still dependent on the behavior of the librarian.
	1. Names the sources to be used, when appropriate.
	
	2. Works with the patron to narrow or broaden the topic when too little or too much information is identified.
	
	3. Recognizes when to refer the patron to a more appropriate guide, database, library, librarian, or other resource.
	
	4. Offers detailed search paths or links/URLs to needed electronic resources. Excessively long links have been converted to a shorter link (for example, using Tiny.URL)
	
	5. If appropriate, detailed directions to physical resources are given, for example
	    - Call #s and Floor #s
	    - Room #s
		1. Names the sources to be used, when appropriate.
		
		2. Indicates that the patron needs to narrow or broaden the topic when too little or too much information is identified.
		
		3. Recognizes when to refer the patron to a more appropriate guide, database, library, librarian, or other resource when appropriate
		
		4. Offers detailed search paths or links/URLs to needed electronic resources.
		
		5. If appropriate, general directions to physical resources are given, for example – either call #s or floor #s, but not both.
			1. Does not name the sources to be used when appropriate.
			
			2. Does not work with the patron to narrow or broaden the topic when too little or too much information is identified.
			
			3. Does not refer the patron to a more appropriate guide, database, library, librarian, or other resource when appropriate
			
			4. Does not offer detailed search paths or links/URLs to needed electronic resources.
			
			5. Even if appropriate, directions to physical resources are not given.

Rubric Notes for Searching: 1. Librarian answers that were clearly inaccurate to the scoring group received the "Beginning" (1) score. 2. Close-ended questions that required little or no searching on the part of the librarian received the "Accomplished" (3) rating.			

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Follow-up			
Follow-up The reference transaction does not end when the librarian leaves the patrons. The librarian is responsible for determining if the patrons are satisfied with the results of the search, and is also responsible for referring the patrons to other sources, even when those sources are not available in the local library	1. Encourages the patron to return if they have further questions by making a statement such as – "if you don't find what you are looking for, please come back and we'll try something else" or similar. 2. Makes the patron aware of other reference services, if appropriate (email, instant chat, phone, etc.) 3. Makes arrangements, when appropriate, with the patron to research a question even after the reference transaction has been completed. 4. Refers the patron to other sources or institutions when the query cannot be answered to the satisfaction of the patron. 5. Takes care not to end the reference interview prematurely.	1. Does not encourage the patron to return if they have further questions. 2. Makes the patron aware of other reference services, if appropriate (email, instant chat, phone, etc.) 3. Does not make arrangements, when appropriate, with the patron to research a question even after the reference transaction has been completed. 4. Does not refer the patron to other sources or institutions when the query cannot be answered to the satisfaction of the patron. 5. Takes care not to end the reference interview prematurely.	1. Does not encourage the patron to return if they have further questions. 2. Does not make the patron aware of other reference services even when appropriate (email, instant chat, phone, etc.) 3. Does not make arrangements, when appropriate, with the patron to research a question even after the reference transaction has been completed. 4. Does not refer the patron to other sources or institutions when the query cannot be answered to the satisfaction of the patron. 5. Ends the reference interview prematurely, before answering or addressing all parts of a question.