

SAILING THROUGH VIRTUAL REFERENCE SERVICE ASSESSMENT

Step by Step

Step 1 Select Transcripts

- Randomly select a percentage of each person's transcripts and logs
- Select a large enough sample to adequately represent the diverse questions we are asked

Person responsible: department head or a committee/task force.

Step 2 Prepare Transcripts

- Strip patron identifying information
- Remember to strip librarian identity as well – this allows for a much freer discussion
- Must stress that individuals are not being evaluated; the work is

Person responsible: department head or a committee/task force

Step 3 Set Standards

- Quality standards should be decided upon and acceptable norms established
- It is most useful to come to an agreement as to what constitutes "quality" reference service for several reasons:
 1. Establishes a standard for future training
 2. Makes clear that there are different levels of quality that are acceptable
 3. Underlines the complexity of matching the quality of service to the goals and objectives of the department
- Select standards for judging from the following:
 1. Courtesy/tone
 2. Accuracy
 3. Interview/clarification
 4. Information literacy
 5. Response time
 6. Grammar/spelling
 7. Follow up/referral
 8. Patron satisfaction

Person responsible: entire department

Step 4 Evaluate

- Identify type of question
 1. Ready reference
 2. Research
 3. Technical / Access
 4. Circulation/ILL/Reserves
 5. Directional
 6. Instructional
 7. Other
- Analyze and discuss – suggested questions
 1. Are the suggested resources valid?
 2. Are the tone, grammar and personal style appropriate?
 3. Is the answer instructive and is that appropriate?
 4. Is there any follow up and is that appropriate?
 5. Is the answer complete?
 6. Are standards met?

Person responsible: entire department

Step 5 Follow-up

- Identify areas for improvement
- Reassess in one year
- Modify e-mail reference training procedures

Person responsible: department head or a committee/task force

Krystal Lewis & Firouzeh Logan

University of Illinois, Chicago
Richard J. Daley Library
Reference Department
kmlewis1@uic.edu
flogan@uic.edu
312-996-2726