

Quality Transcript Rubric for Ask Us 24/7 Assessment – Simple Version

How to use:

For each question, rate the transcript on a scale of 1 to 4, using NA where appropriate.

Add up the number of questions that were given a rating (do not include the ones marked NA). Multiply this number by 4. This is the second number in the fraction.

Add up all the scores given. This is the first number in the fraction.

Example: If all 7 questions were given a rating, the total possible score is 28. Adding up all the ratings will give a grand total such as 22/28.

Divide the first number in the grand total by the second number, to get a percentage: $22/28 = 78\%$

Greeting:

4. A greeting includes all of these components: willingness to help, sounds natural (not robotic), neither overly long or too abrupt, the correct name of the service (or a generic name, like “our chat service”) is used.
3. A greeting is sent but is missing one of the above components.
2. A greeting is sent but is missing more than one of the above components.
1. No greeting is sent.

NA

Reference interview:

4. Reference interview is adequate to understand the question and the patron’s information need.
3. Reference interview is adequate, but does not clarify patron’s question at appropriate points during the transaction.
2. Reference interview does not clarify patron’s question and fails to identify patron’s information need.
1. No reference interview.

NA

Quality of Resources:

4. One or more relevant resources are recommended. Resources are at the appropriate level for the patron’s research.
3. Only one (or few) relevant resources are recommended when more are appropriate.
2. All resources are dubious.
1. No relevant resources are recommended.

NA

Factual information: (directional information: phone numbers, hours, policies. Does NOT include URLs or sources)

4. Correct
3. Mostly correct
2. Mostly incorrect
1. Incorrect

NA

Instruction: (items such as how to use search terms, create search strategies, select resources, cite sources, evaluate sources, access resources)

4. Transaction includes detailed instruction.
3. Transaction includes instruction.
2. Transaction includes limited instruction.
1. Transaction warranted instruction, but none provided.

NA

Interpersonal Skills:

4. Creates a welcoming atmosphere. Chats frequently without long lags and shows interest in the patron's question. Uses positive phrasing. Also uses scripts appropriately, as needed.
3. Creates a mostly welcoming atmosphere; although there may be some lags, and/or not enough positive phrasing.
2. Creates a less than welcoming atmosphere. There are long lags and the librarian does not show adequate interest in the patron's question. Does not use scripts appropriately, or copies chunks of policy pages and sends to the patron without rewording.
1. Interpersonal skills are completely lacking and inadequate.

NA

Example:

Policy page info for Onondaga Library System:

"The last four digits of your phone number on record is the default PIN. If you have forgotten your PIN, or do not have a PIN already entered in your patron record, please contact one of the OCPL libraries to establish a PIN. PINs are NOT given out online or by email."

This should **not** be copied/pasted to the patron directly – too robotic. Instead: "The last 4 digits of your phone number are the default pin. Can you try that and see if it works?..." Then waiting for a response before providing more info.

Concluding the session:

4. The conclusion includes the following components: asking if the question has been completely answered or if more help is needed, thanking the patron for using the service, and using the correct name for the service (or a generic name, like "our chat service") based on the patron's location.
3. The conclusion is mostly complete, but missing one of the above components.
2. The conclusion is not complete and is missing more than one of the above components.
1. The conclusion is inadequate, abrupt, or missing completely.

NA

Grand total

___/___ = ___ %