

Rubric used by University of California Libraries to assess digital reference transcripts 2009.  
 UC Rubric based on Question Point's Best Practices and a rubric from the Maricopa Community Colleges.

Greeting	4. A personal greeting is sent and indicates willingness to help. 3. A personal greeting is sent, but does not indicate willingness to help. 2. A personal greeting is sent, but is inadequate, abrupt, or incomplete. 1. No personal greeting is sent. N/A
Reference Interview	4. If necessary, patron's question is clarified at appropriate points during the transaction. 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. N/A
Quality of Sources	4. One or more relevant sources are used. Sources are at the appropriate level for the patron's research. [In general, databases are preferable to Google or other general sources when assisting students with research projects.] 3. Only one relevant source is used when more are appropriate. 2. All sources are dubious. 1. No relevant sources are used. N/A
Factual Information (e.g. phone numbers, policies, URLs)	4. Provided information and source. 3. Provided information without the source. 2. Did not provide answer but made appropriate referral or marked as follow-up. 1. Did not provide answer or referral and did not mark follow-up. N/A
Instruction	4. Transaction includes detailed instruction with examples and/or how-to steps. Librarian may instruct how to: create search terms and strategies, select databases, search databases, cite sources, and/or evaluate sources. 3. Transaction includes some instruction. Librarian may provide database suggestions with links, search term suggestions, and citation guides with links. Detailed assistance, such as use of examples, is not provided. 2. Transaction includes limited instruction. Librarian may suggest databases, but links and/or search term assistance are not provided. 1. Transaction warranted instruction, but none provided. N/A
Interpersonal Skills	4. Interpersonal skills create a welcoming atmosphere. Librarian chats frequently without long lags and shows interest in the patron's question. Librarian uses positive phrasing; also uses scripts appropriately, as needed. 3. Interpersonal skills create a mostly welcoming atmosphere; although there may be some lags, and/or not enough positive phrasing. Scripts are used appropriately, as needed. 2. Interpersonal skills create 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 much positive phrasing. Does not use scripts appropriately. 1. Interpersonal skills are completely lacking and inadequate.

	N/A
Concluding the Session	4. The conclusion is complete: the Librarian asks the patron if their question has been completely answered. If not, the session is coded for follow up. Before coding, the patron's e-mail address and deadline are verified. If no more information is needed, patron is thanked for using the service and encouraged to return.
	3. The conclusion is mostly complete, but missing one of the follow up components.
	2. The conclusion is not complete and is missing more than one of the follow up components.
	1. Conclusion is inadequate, abrupt, or missing completely.
	N/A - Mark if the patron disconnects without allowing the librarian to conclude the session.

Average Rating Key	
4	Superior Service
3	Adequate Service
2	Room for Improvement
1	Inadequate Service
0	Not enough information was provided to accurately rate the transcript's quality of service.
Average ratings were derived by averaging the ratings for each section when there was sufficient information present in the transcript to make an evaluation. If there was insufficient information, the category rating was left blank and not taken into account when creating the average score.	