



Reference Session Evaluation Checklist

Software/Technical			
Yes	No	N/A	
			The librarian sent a web page and not just a URL
			The librarian sent what she/he announced
			The librarian successfully sent files or screenshots
			The librarian successfully used proprietary databases
Research/Search Skills			
Yes	No	N/A	
			The resource or item sent answered or partly answered the question
			The librarian sufficiently evaluated the item before sending it
			The librarian checked if the resource (e.g., a web site's search facility, links, etc.) was functional before sending it
			Appropriate resources were used in answering this question
			A Resolution Code was properly assigned
Communication and Model Reference Behavior			
Yes	No	N/A	
			The librarian used open-ended probing questions to elicit the customer's specific question
			The librarian maintained a steady dialog with the customer
			The librarian kept the customer informed of her/his activities

			The librarian communicated what next steps were expected of the customer
			The librarian made appropriate use of scripted messages
			The librarian informed the customer before sending an item
			The librarian explained to the customer what she/he sent
			The librarian provided instruction in the resource sent, if needed
			The librarian explained where to find the answer in the item sent
			The librarian appropriately referred the call
			The librarian appropriately took responsibility for getting back to the customer.
			The librarian asked the customer if she/he has completely answered the question
			It was clear from the customer's point of view that the librarian was ending the session