Self Evaluation Checklist

Reference Interview

- Did you open with a personalized and friendly greeting?
- Did you use open-ended questions to clarify the patron's information need?
- Did you ask what resources they had already searched?
- Did you ask closed-ended questions to ensure that you understood the question?

Search & Communication

- Did you tell the patron what you were doing as the search progressed?
- Did you guide them through the search process when appropriate?
- Did you inform them that you were sending a link before sending it?
- Did you offer any additional explanation of how the link would help answer their question?
- Did you check that the patron reached the site?
- Did you check that they found the site helpful?
- Did you use the library's databases to help the patron?
- Was the patron able to authenticate and access the resources successfully?
- Did you provide them with instructions on how to use and navigate the resources/databases when appropriate?

Follow-up & Closing

- Did you need more time to answer the question?
- Did you refer the patron to further sources?
- Did you cite specific sources to support your answer?
- Were the sources you used reliable?
- Did you ask a close-ended question at the end of the session to ensure that the patron had all the information they needed?
- Did you answer the question correctly?
- Did you answer the question completely?
- Is there any evidence that the patron is satisfied with the information and support you provided?
- Did you close with an appropriate goodbye and follow-up statement?
- Do you feel that you gave a level of assistance comparable to the service the patron would have received at an information desk?
- Were you happy with the way you handled the question overall?

Other Questions

- Were you dealing with more than one caller during this session?
    - If so, how do you feel this affected the quality of the session?
- What do you feel you handled best about this transaction?
- What do you feel you could have improved? Why?