

Self Evaluation Checklist

Reference Interview

Did you ...

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

Search & Instruction

Did you ...

- Guide them through the search process when appropriate?
- Ask if they were able to open any links that you sent?
- Offer an additional explanation of how the link would help answer their question?
- Check that they found the website or resources helpful?
- Ask if they were able to login and access resources successfully?
- Take advantage of teachable moments and provide instruction?
- Explain any library terminology (e.g. peer reviewed)?
- Convey encouragement and interest when appropriate?

Follow-up & Closing

Did you ...

- Need more time to answer the question?
- Refer the patron to further sources or an appropriate contact?
- Ask a close-ended question at the end of the session to ensure that the patron had all the information they needed?
- Answer the question correctly? Answer the question completely?
- Learn if the patron was satisfied with the information and support you provided?
- Close with an appropriate goodbye and follow-up statement?
- Feel that you gave a level of assistance comparable to the service the patron would have received at an in-person research desk?
- Feel satisfied with the way you handled the question overall?

Further Reflection

- Were you responding to more than one patron 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?