

**University of California**  
**Interim Report on UC Libraries participation in 24/7 Digital Reference**

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To: UC Heads of Public Service  
From: Lynn Jones and Cynthia Johnson, Co-chairs, UC Digital Reference Common Interest Group  
Re: Interim Report on 24/7 Academic Reference Cooperative  
Date: July 31, 2009

In January 2009 UC joined the national 24/7 QuestionPoint (QP) Academic Reference Cooperative on a trial basis through June 2010. Our patrons have had access to reference librarians around the clock since January 20. On March 30, UC librarians began offering reference service to the 24/7 queue as well. We have seen our patrons' usage and the number of questions we answer increase dramatically during this time. This report discusses the progress of the pilot.

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**Assessment**

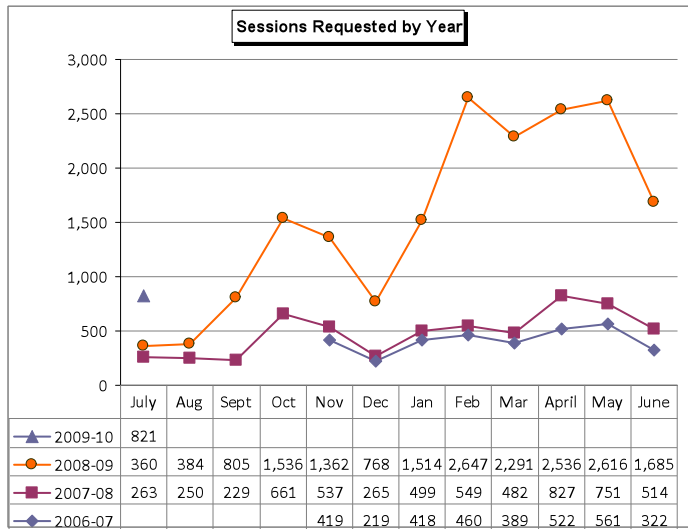
Upon starting the pilot, the biggest questions in most librarians' minds had to do with usage of the service outside of UC hours, the quality of service provided by non-UC librarians, and how difficult it would be to answer questions for non-UC patrons. This section of the report addresses those concerns.

**Usage**

Use of Ask a UC Librarian has grown tremendously over the past year, which we attribute to the increased placement of qwidgets in October 2008, and the 24/7 schedule. Over 19,000 questions have been asked by UC patrons since January 20, 2009 [Chart 3, below]. The start of 24/7 and continued heavy use of the service is obvious in the orange line in Chart 1 below. This remarkable surge in patrons served convinces the CIG that the UC investment in QuestionPoint is well warranted.

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**Chart I: Volume of Questions from UC Patrons, 2006-2009**  
**Qwidget introduced October 2008**  
**24/7 hours began January 2009**

The following charts show the distribution of usage over the year, during the week, and by the hour. Peak usage following academic semester and quarterly schedules is evident in Chart 2. Chart 3 shows that lowest, but still substantial usage is on Saturdays, with a clear pattern of highest usage in early mid-week. Chart 4 documents heaviest usage during the hours UC is staffing. This may reflect a preference for the qwidget interface, or a preference for those hours. Not enough information is available to determine the reason.

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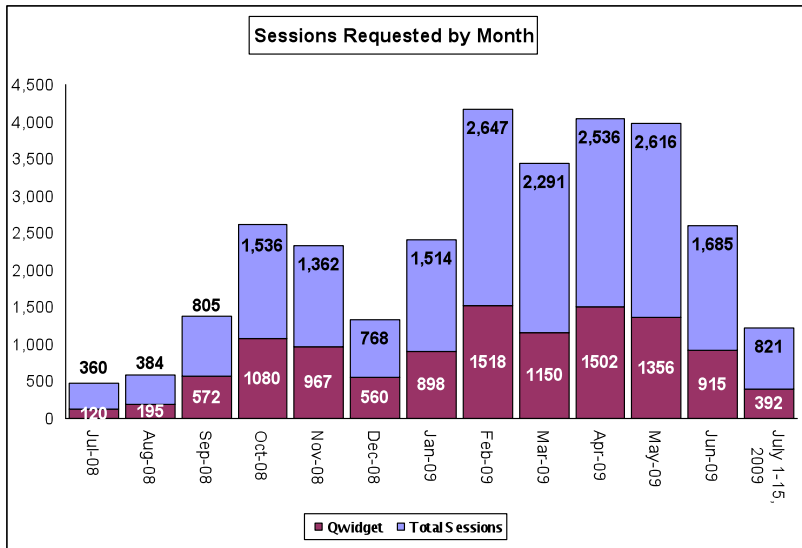


Chart 2: Volume of Questions from UC Patrons: July 1, 2008- July 15, 2009

Sessions requested (by day)	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Total or Average
questions	1,416	3,792	3,942	3,904	3,293	2,257	721	19,325
number of days	41	51	53	53	52	51	25	326
average questions per day	35	74	74	74	63	44	29	59

Chart 3: Volume of Questions from UC Patrons Since Joining the Cooperative

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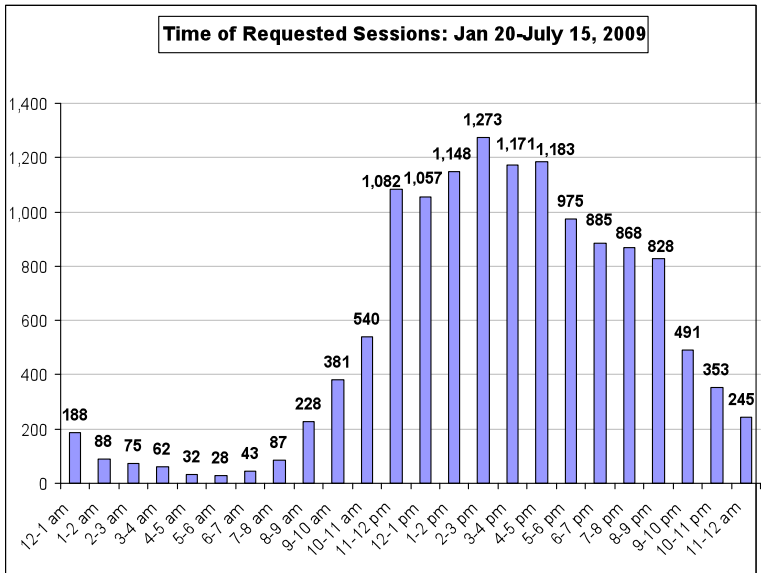


Chart 4: Volume of Questions from UC Patrons Since Joining 24/7 Cooperative, by Hour

A complete set of data, including further detail and campus by campus information may be found at the ucdigref wiki <http://ucdigref.pbworks.com>. Look in the sidebar for Statistics, and choose “Data used in 24/7 Interim Report, January - July 2009.”

**Quality of Service**

Overall, the responses to UC patron questions from non-UC librarians have been impressive. Librarians from outside the UC system are able to provide more than adequate answers to the majority of our patrons. This is evident from a survey of transcripts undertaken by Irvine on behalf of the CIG.

Between March 10 and June 10, 2009 2,395 UC questions were answered by non-UC librarians. 5% of the complete transcripts<sup>1</sup> of these questions were analyzed using a rubric modified from Maricopa Community College’s rubric, which was largely based on QuestionPoint’s “Best Practices for 24/7 Reference Cooperative Sessions.”<sup>2</sup> (See Attachment 1 for our rubric). Each transcript was analyzed by looking at seven categories:

<sup>1</sup> 124 transcripts: UCLA 11; UC Merced 2; UC Berkeley 13; UC Davis 2; UC Riverside 20; UC San Francisco 1; UC Santa Barbara 18; UC Santa Cruz 11; UC San Diego 16; UC Irvine 30

<sup>2</sup> available at <http://wiki.questionpoint.org/247-Best-Practices>

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Greeting; Reference Interview; Quality of Sources; Factual Information; Instruction; Interpersonal Skills; and Concluding the Session. We divided the questions into two groups: Access-related and Research. Access-related questions include providing information about accessing full-text online and other basic, directional questions. All other questions were considered Research. At most campuses, access questions outnumbered research questions.

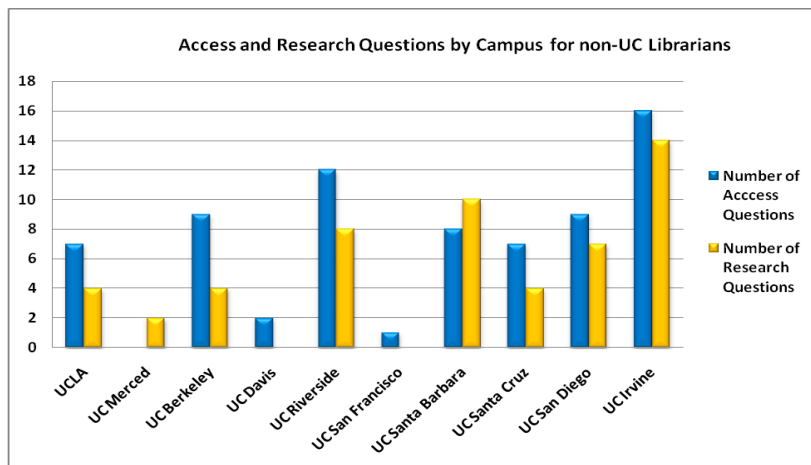


Chart 5: Types Of Questions Answered By Non-UC Librarians, By Campus, Since January 20, 2009

Transcripts coded “Research” were checked by a second person, to ensure that not only was the customer service element of the transaction of high quality, but that appropriate information and resources were provided. (For examples of both a Research question and an Access question, and how each was coded, see the CIG wiki <http://ucdigref.pbworks.com>. Look in the sidebar under Transcripts.)

Each transcript was rated for quality on each category of performance. Charts 6 and 7, below, show the average ratings. The overall average rating for all answers is 3.49 points, squarely between 3 (adequate service) and 4 (superior service). Access-related questions rate slightly higher, average 3.57 points, and research questions rate slightly lower, average 3.38 points. The non-UC librarians received high marks in the areas of Quality Sources and Interpersonal Skills. Instruction, which is more difficult to provide in the chat environment, was not rated as high, but also was not inadequate. In Chart 7, which displays the same data as Chart 6 in graphic form, it is more obvious that the Reference Interview category was rated more highly in the Access questions than in the Research category. It is less surprising that Instruction was not as strong for Access questions as for Research. Some of these data require more investigation to interpret.

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Average Overall Ratings		Average Access Ratings		Average Research Ratings	
Greeting	3.63	Greeting	3.62	Greeting	3.74
Reference Interview	2.92	Reference Interview	4.00	Reference Interview	2.92
Quality Sources	3.65	Quality Sources	3.57	Quality Sources	3.68
Factual Information	3.61	Factual Information	3.52	Factual Information	3.58
Instruction	2.87	Instruction	2.10	Instruction	2.85
Interpersonal Skills	3.72	Interpersonal Skills	3.86	Interpersonal Skills	3.53
Conclusion	3.40	Conclusion	3.54	Conclusion	3.33
Average for all questions	3.49	Average for access questions	3.57	Average for research questions	3.38

Chart 6: Average Ratings of Non-UC Librarians' Transcripts, Access and Research Questions

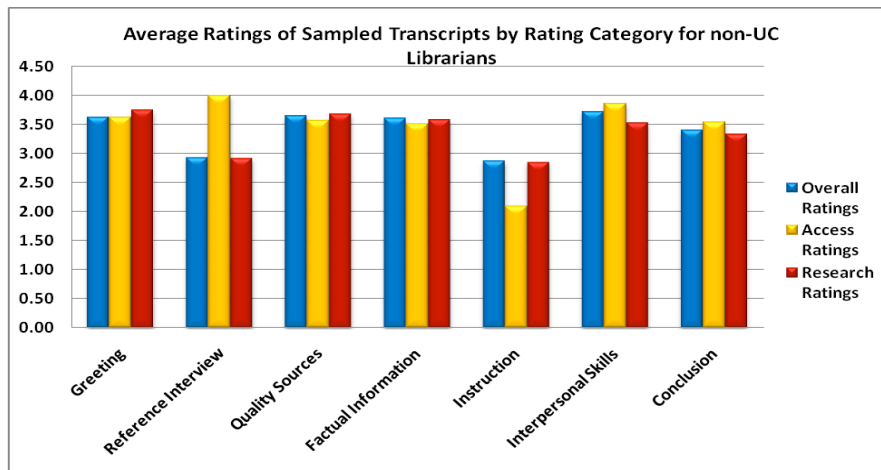


Chart 7: Average Ratings of Non-UC Librarians' Transcripts, Access and Research Questions

**Patron Satisfaction**

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To get a sense of our patrons' satisfaction with the service provided by non-UC librarians, and to compare that with service from UC librarians, we looked at a sample of 177 user surveys<sup>3</sup>. We compared how often patrons submitted overall positive surveys versus overall negative or neutral surveys. For non-UC librarians, responses were 87% positive (55 out of 63 surveys were positive). For UC librarians, responses were 89% positive (101 positive out of 114 surveys).

Positive comments from the surveys [for more comments see User Surveys in the ucdigref wiki]:

"I am almost always satisfied with the help and service by the UC Library staff. A ++ Thanks for your assistance."

"Much faster, easier, etc. BTW, thanks for doing the survey. You must keep this service!!!!"

"This was a fun experience."

"Top 21st century service".

"Great to have 24/7 service! Very helpful for students!"

"The staff person was even willing to ask other people for help for me, it was great!"

"I wish that I would have used it earlier"

"THANKS! Awesome service!"

"Re the last question [in the user survey]. I did know some other things to try, but noticed the service. I think that it is super that you have it and that I ended up working with someone at another UC Campus. Debbi was very helpful. Til next time, David Brillinger, Professor of Statistics, UCB"

"I was pleased to get a reply from another campus--nice collaboration! The OskiCat system is new, so s/he didn't know the answer, but did try to contact a Berkeley librarian by phone several times, and gave me their number at the end so I can follow up. The one probably silly problem I had was that at first I didn't notice the chat bar on the right side--I was looking all over the main screen for my opportunity to enter a question. Maybe an arrow saying "look over here, dummy?" :-)"

"It was first ever 'chat' on the net and it worked very well for me. Thank you."

"This service is unbelievable! I didn't know it existed. I'm blown away. Tell the Governor "hands off 'Ask a Librarian!'" John McReynolds, Lompoc

"I think that this is a very useful and helpful tool, KEEP IT!"

"Great source. Only comment would be that I pulled up the UC Berkeley website and was chatting with someone from UCSD, so that was a little confusing.. Overall it was great."

"Thanks to Librarian Ken (UCR)'s answering!!!"

Negative comments comprised only 21 out of 177 responses :

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<sup>3</sup> Surveys submitted by UC Irvine and UC Berkeley patrons.



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“My librarian could not help me at all and kept telling me to access a database recommended by my library when that was what I was asking her to help me with. She didn't answer my question, she ended the conversation before I could respond, she stopped listening to my concerns, and the only advice I was given was to visit my own library. This was extremely unhelpful. I feel extremely frustrated because this was a waste of time, and I feel I was treated rudely since I wasn't being listened to.”

“it seemed like this person did not know how to research the only thing that they told me was to search on google scholar and when i told her, Abby, that I had used that same search terms and have gotten those results she was just very rude and left the chat.”

#### Librarian Comments

Anecdotally, UC librarians staffing the service have been happy with their experiences. We asked them the following two questions in an informal email survey:

How do you think it is going having non-UC libraries answer UC patrons' questions?  
How do you think it is going answering non-UC patrons' questions?

Only four responses were received but they were all positive:

“My experience is limited to how other people are answering UC questions. Overall I've been very impressed with the transcripts for people forwarded to UCSF; the people answering the question always try to help, and go to logical parts of our web page. The service providers are clear about the fact that they are not at UCSF and tell the patron that they are going to forward the request to us for further assistance. One time someone was disconnected (perhaps a "lost connection," but I don't think so), and the chatter forwarded to us promptly. So I am pleased.”

“I think that the entire process is going better than I expected. I find the 24/7 staff are excellent and give detailed help to our patrons. I still wish that we required Qwidget requestors to give their email addresses, since we get many requests that cannot be followed up.”

“I think it's going fine. I don't really see a difference between having a UC librarian on another campus answer a question and a librarian from across the country answer a question, and the same goes for the patrons' locations.”

“On June 24, a few hours after OskiCat, the new UC Berkeley catalog, went live, the first online question about it came in to QP. The patron at UCB evidently followed the "Questions? Ask Us" link in OskiCat, used the chat widget, and was connected to a librarian at University of Nebraska, who was able to use the UCB info that's built into the QuestionPoint system to provide an appropriate web page and two contact addresses. That's pretty slick.”

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**Schedule & staffing**

Our contract with QuestionPoint requires that we staff the 24/7 queue for 40 hours per week. (We are free to cover more hours for our own UC queue). During the spring quarter (March 30 – June 12) UC staffed the service for a total of 50 hours per week. (See spring schedule, attachment 1). Because evening hours count for double credit, only 30 of those hours were on the 24/7 queue; the remaining 20 hours were on just the UC queue. The final schedule was created in March 2009, following six weeks of analysis of UC usage. and. This schedule was designed to enable us to capture a large part of the UC questions, which it does: UC librarians respond to 68% of all UC questions on average. Conversely, 4100 questions (32%) were asked when we would not have been available—a clear improvement in service during a time of staffing cutbacks.

	Jan 20-	Feb	March	April	May	June	July 1-15	Total
UC Monitoring	604	1,971	1,559	1,815	1,761	1,177	434	8,887
UC not Monitoring	291	872	771	770	872	524	386	4,100
Total	895	2,843	2,330	2,585	2,633	1,701	820	12,987
% UC	67%	69%	67%	70%	67%	69%	53%	68%

**Chart 8: Volume of Questions from UC Patrons During Hours UC Scheduled Hours and QP Backup Hours**

During the summer we do not staff weekends or after 5:00 p.m.; instead we cover 30 hours per week, all of which are on the 24/7 queue. (See summer schedule, attachment 2) CIG has discussed redistributing QP hours based on the amount of staff a campus can contribute, with a maximum of 10 hours per campus per week. This results in just minor changes in hours, but seems the most practical way of distributing the shifts.

QuestionPoint’s stated expectation of service providers is to handle one transaction at a time, unless the service provider is comfortable handling multiple questions at once. While we rarely try to juggle multiple questions during face-to-face reference [unless we have the user set up to work on his or her own] technology enables us to be more efficient. However, service quality can suffer when staff try to handle many calls at the same time. If the qwidget could roll over to the 24/7 queue it would relieve those few very busy times, when librarians have occasionally tried to answer as many as three to five questions simultaneously.

Because of the volume of questions, most campuses double-staff. The CIG feels that double staffing is necessary, particularly during our 24/7 shifts. Campuses are open to the idea of sharing coverage, i.e., partnering staff from one campus with staff from another, in order to achieve double staffing for campuses with insufficient staff. Currently Santa Cruz is sharing coverage with both San Diego and Los Angeles, a successful model other campuses would like to implement. Some campuses occasionally triple-staff, but we have no plans at this time to require this.

Our contract with QuestionPoint establishes a threshold for the number of questions we must answer during our 24/7 shifts to cover our share of the workload for the academic cooperative. We are expected to answer on average a number of questions equal to 75% of the reference questions asked by our patrons. Our answers need not all be to our patrons’ questions, but we get a 40 second head start on questions from UC patrons. Also, since about half our UC questions come through qwidgets [see Chart 2], which are not seen by

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the 24/7 librarians, we answer those questions ourselves. We have exceeded the 75% requirement three of the four months we have been covering the 24/7 queue [see Chart 8]. An exception is the month of July 2009, where we only staff 30 hours per week.

Percent of 24/7 sessions accepted/requested*	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-09	July 1-15, 2009	Totals
All Questions	1,514	2,647	2,291	2,536	2,616	1,685	821	14,110
UC Accepted	1,197	1,817	1,485	2,195	1,879	1,332	526	10,431
Backup Queue* Accepted	233	1,817	956	724	876	530	358	5,494
Percent UC Answered	79%	69%	65%	87%	72%	79%	64%	74%

\* 24/7 coverage started Jan 20. UC staffing 24/7 started March 30

**Chart 9: Percentage of All Questions Accepted by UC Librarians**

A close analysis of the data shows that during the hours we staff, we pick up more than 75% of questions. We will look more closely in the future about why and when we hit the 75% mark and why and when we don't, so that we can adjust our scheduling and/or training accordingly.

## Training

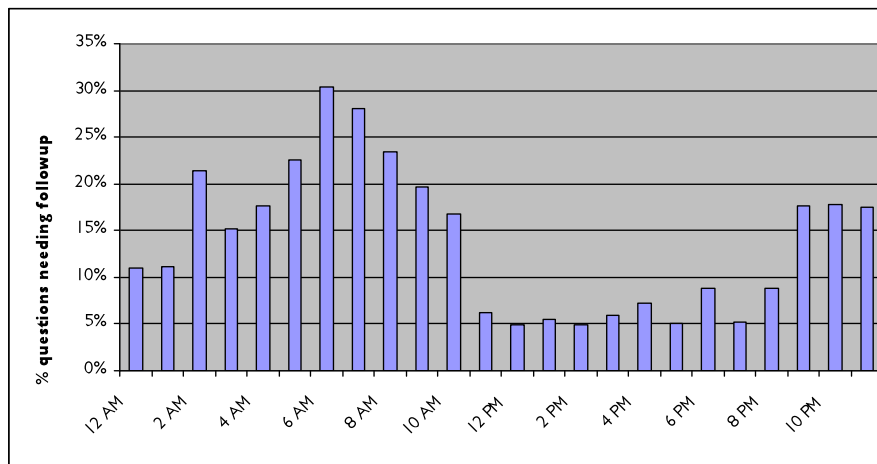
OCLC provided two training webinars in early 2009: one for CIG representatives on the administrative reports, to enable us to gather and analyze data for assessment and planning, and to better understand the administrator's role; and a second webinar for all reference providers concerning the specific procedures and best practices of the 24/7 reference cooperative. There were several minor settings changes that campuses had to make in our QP administrator modules. In addition, each CIG representative ensured that staff on her or his respective campus were familiar with changes to procedures after implementation. We used QuestionPoint documentation in this training.

In January 2009 we began to use the 'Follow up by Patron's Library' function consistently and effectively, which required a bit of self-training. The QP follow-up function automatically sends unresolved questions to the library of the university where the questioner is affiliated. Why is this significant? Because we anticipated both receiving more follow-up questions from non-UC providers, and sending more follow-ups to non-UC libraries after joining the 24/7 cooperative, we felt we needed to become familiar with the feature. Each campus now monitors its referred questions daily and responds in a timely manner. Referral questions help us improve our policy pages and web pages, as we see where patrons and other librarians have trouble with our pages.

The following chart for the period Jan 20<sup>th</sup> through July 15<sup>th</sup> shows that the percentage of questions requiring follow up increases greatly during hours UC is not scheduled.

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**Chart 10: volume of UC questions requiring followup Jan 20- July 15, 2009**

In February 2009 two Berkeley service providers conducted a one-day training session at Santa Cruz for UCSC reference staff. Santa Cruz began providing service in March 2009. Santa Cruz staff was initially scheduled in pairs with other campuses' staff for training purposes, but has continued to serve this way as a new model of staffing. It has been so successful we hope to extend the model to other campuses.

All UC service providers have been encouraged to subscribe to the QP 24/7 service listserv to remain current with changes to the service.

### **Software issues**

Policy pages contain information about our libraries, our policies, and frequently used links in a standardized format, to assist librarians during chat sessions to answer our patrons' questions. In advance of joining the 24/7 service OCLC staff reviewed each campus's policy page for completeness, consistency and clarity. Campuses edited their policy pages accordingly, and many points of confusion were clarified. CIG will schedule regular reviews of policy pages and scripts.

QP staff advised CIG that when responding to non-UC questions we should not apply descriptors to answered questions, because transactions descriptors are not coded by QP backup or participating libraries per QP policy. CIG decided to eliminate descriptors from our own questions as well, since they were not adding information we could use in consistent application of descriptors, as in any system where there is a high level of subjectivity/interpretation on the nature and granularity of questions within a transaction. Individual institutions have the option to add descriptions after the transaction is complete.

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The Ask a Librarian chat widget [‘qwidget’] is an alternative patron interface to the proprietary QP chat viewport. The qwidget is very popular because it is small, looks like a familiar instant messenger window, and can be embedded into any webpage. However, the qwidget does not direct questions to the 24/7 queue—only UC librarians can see them. Thus questions coming from qwidgets are only picked up when a UC librarian is staffing the service. This situation exists because some universities in the 24/7 consortium want to keep the qwidget as a separate workflow.

Campuses have developed different workarounds to this problem:

Berkeley -- when UC is not staffing, an inactive qwidget appears with a link to viewport inside it.

UCLA –users access Ask a Librarian service through Qwidget when local campus-wide digital reference pilot is not in service, and the chat form for all other hours [locally programmed web based scripts.]

Irvine – primarily uses the viewport, so doesn’t experience the problem

San Francisco – only uses the viewport, doesn’t experience the problem, and is low use in any case

Merced -- qwidget disappears when no UC’s are staffing, link goes to viewport [special qwidget coding]

San Diego — qwidget disappears when no UC’s are staffing, link goes to viewport [special qwidget coding]

Santa Barbara – qwidget disappears when no UC’s are staffing, link goes to viewport [special qwidget coding]

Riverside – qwidget disappears when no UC’s are staffing, link goes to viewport [special qwidget coding]

Santa Cruz– offers both the qwidget and viewport on the same page, so doesn’t experience the problem

There are issues with all of these solutions: either special coding is required to make the qwidget disappear when no UC’s are staffing, or patrons make experience confusion when multiple entry points are provided, or we may lose some patrons who can’t figure out the link inside the viewport. CIG has requested OCLC change the programming to roll qwidget questions into the 24/7 queue, but there is no timetable given yet to make this change. Most campuses are simply waiting for QuestionPoint to change the software to enable qwidget questions to roll into the 24/7, which QP staff have indicated is in the works.

The qwidget is a very valuable feature of QP, but we feel it needs some improvement. For instance, if our librarians forget to log out of QP, the qwidget remains active yet questions are left unanswered [because no UC staff are actually there to pick up the qwidget questions]. This would be resolved if the qwidget rolled into the 24/7 queue. Also, because the qwidget does not require patrons to enter an email address, a large percentage of questions sent for followup cannot be followed up, because there is no way to contact the patron after the conclusion of the chat.

QuestionPoint has shown instability lately (problem in late June, early July 2009) causing dropped calls and slow connection time. This is an intermittent problem that QP keeps working on with software updates.

Late breaking news from the QP Users Group Virtual Meeting (July 30, 2009)

- A new qwidget will be introduced in August that will permit us to require an email address from patrons

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- The new qwidget will become more customizable in color and size
- OCLC is continuing to work on improving system stability, and would like all service providers to report all problems immediately directly to their supportlines.

### Promoting the Service

In January 2009, CIG decided to rebrand the service as “Ask A Librarian,” to adjust user expectations, since much of the time non-UC librarians are answering questions. We edited and updated the viewport to explain the 24/7 service.

Individual campuses took responsibility for deciding how to promote the 24/7 service to their own constituencies. We used QuestionPoint promotional materials to model our own promotional tools, paying particular attention to the language used and the formats that had proven successful for other libraries: [[http://QuestionPoint.org/support/promote/promote\\_qp.html](http://QuestionPoint.org/support/promote/promote_qp.html) includes a sample press release, posters, table tents and bookmarks.] Because each campus made use of formats and communication tools already in place, marketing the 24/7 service took a variety of forms:

- Articles appearing in Library newsletters and publications
- Provision of sample promotion email to subject selectors/liaisons for distribution to academic departments/programs
- Posters and table tents
- Marketing videos<sup>4</sup>

Some marketing materials have been posted to the CDI shared materials site <http://www.cdlib.org/inside/instruct> under “Ask a Librarian.”

An important promotional strategy is the placement of links to Ask a Librarian chat and the qwidget within library webpages and research tools. Libraries that put links or qwidgets on the top level of the library website and within search tools (UC-eLinks, catalogs, subject pages) see greatly increased usage of the service. Ongoing discussion of links to the service within Next Generation Melvyl have ensured optimal placement in the union catalog, although we have not been permitted to use the Ask Us logo as the link.

### Recommendations

Librarians are comfortable with the service and the software. We are able to serve many more patrons than we would otherwise reach, and service quality is high. CIG recommends we continue with the pilot. At this point, with the information we have, and if no serious problems occur, we anticipate recommending that UC continue the 24/7 reference consortium contract after the conclusion of the pilot.

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<sup>4</sup> See Attachment for links to sample promotional materials.

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Next steps for CIG include continuing our quality analysis and investigation into usage patterns, with an eye toward adjusting the schedule and staffing if needed.

To get a better understanding of patron use and adoption of the service we could compare usage and the number of questions from QP to the number of questions at our public service points systemwide. Given the high number of "access" as opposed to "research" questions perhaps this should include those asked at circulation and information desks, as well. CIG and HOPS should reconsider what model for ongoing management of the service we can and should implement beyond the pilot.

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**Attachment 1: Academic Year Schedule**

Fall 2008 - Spring 2009  
 Sept. 29, 2009 - June 12, 2009

[Summer 2009 schedule](#) to see summer schedule

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
11-12	--	SD	SD & SC 24/7	B	SD	R
12.1	--	SD	SD	B	SD	R
1.2	--	I 24/7	M 24/7	LA & SC	I 24/7	B 24/7
2.3	--	I 24/7	M 24/7	LA	I	B 24/7
3.4	--	R	I	SD	B	SB
4.5	--	R	I	SD	B	SB
5.9	LA 24/7	I	SB 24/7	LA 24/7	R 24/7	--

Campus	Hours
Berkeley	6
Irvine	10
Los Angeles	10
Merced	2
Riverside	8
San Diego	8
Santa Barbara	6
Santa Cruz	(2)
Total	50



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**Attachment 2: Summer Schedule**

**Summer 2009 Schedule**

Sunday, June 13 through Sunday, September 27

	Monday	Tuesday	Wednesday	Thursday	Friday
11-12	SD 24/7	SD & SC 24/7	B 24/7	UCB 24/7	R 24/7
12-1	SD 24/7	SD 24/7	B 24/7	UCSB 24/7	R 24/7
1-2	SB 24/7	M 24/7	LA & SC 24/7	I 24/7	B 24/7
2-3	SB 24/7	M 24/7	LA 24/7	I 24/7	B 24/7
3-4	R 24/7	I 24/7	SD 24/7	B 24/7	I 24/7
4-5	R 24/7	I 24/7	SD 24/7	B 24/7	I 24/7

Holidays (UCs do not provide service):  
 Independence Day, Friday, July 3rd  
 Labor Day, Monday, September 7th

Total number of hours UCs need to provide to OCLC/QP for staffing 24/7: **30**  
 (for summer only; Fall 2009 the UCs will revert to 40 hours/week of covering the QP 24/7 Academic Queue)

Total number of hours/service, by campus

UCB	7 hours
UCI	6 hours
UCLA	4 hours
UCM	2 hours
UCR	4 hours
UCSB	3 hours
UCSC	2 hours
UCSD	6 hours
UCSF	?

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**Attachment 3: Transcript Evaluation Rubric**

Rubric for rating transcripts

Rubric for Ask a Librarian	
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.

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	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.	