Code	Type of Instruction	Examples
1	Authority is constructed and contextual	Explain how to research an author's credentials Teach student to evaluate a source to determine if it is authoritative for their research purpose Discuss why authoritative sources differ depending on context
2	Information creation as a process	Explain differences in source types and discuss when each may be appropriate Discuss evolution of information Discuss or explain the peer-review process
3	Information has value	Define the purpose of limitations on information Show student how and why to properly cite sources Discuss why they have access to specific college resources
4	Research as inquiry	Help student develop a research question or choose a topic Evaluate search results and reassess search strategy Share search tips and explain how they work
5	Searching as strategic exploration	Help student narrow their research topic to appropriate scope Help identify high-quality sources by discussing why a source is appropriate or not Help formulate new search strategies
6	Scholarship as conversation	Discuss or explain how citing others' work helps build field of scholarship Discuss or explain how the peer-review process contributes to higher quality research
7	Instructional source given	Librarian points to instructional resource
8	Database access taught	Librarian instructed student how to find a specific database
9	Student disconnected	Student disconnected prematurely
10	*Instruction not given when necessary*	*Did the chat provider miss a clear opportunity to provide instruction or an instructional resource?*

Chat transcript assessment project tasks

Review/modify rubric

- Agree on rubric with reference team. Are there adjustments that should be made?

Prepare transcripts

- Sort chats by READ scale. Remove those marked 2 and below.
- Use Excel to assign random numbers to chats and sort by these random numbers.
- The first 30 chats potentially constitute the random sample.
- Each sample chat was reviewed to ensure project chats are substantive:
  - determine whether chat complexity was accurately marked (3 and above on the READ scale); those deemed as a *1 or 2 are not included*
  - very early disconnects are not included
  - combine dropped and reconnected chats into one transcript
  - if sample chat is disqualified, move on to next in the list
- Anonymize chats by replacing student information and staff information. Replace with generic nomenclature: *'patron name' 'staff name'*

Involve library staff

- Schedule norming session(s) (for CEUs or PDP if possible)
- Email invitation to participate to all library staff who might work with chat
  - Invitation should include background on the project, copy of the rubric, timeline, details about norming session(s), and overall estimated time commitment (7-8 hours).
- Kickoff project at norming sessions where project participants will calibrate their application of the rubric to sample chats.

Conducting the work

- Create online form for inputting codes. AACC Truxal Library uses Libwizard.
- Send out transcripts in three batches of ten. Give at least a week for each batch. Check in to form reports to see if there are stragglers. Email friendly nudges as needed.

Closing the loop

- Share report of outcomes with *entire library staff*. This report should identify takeaways and identify some future trainings that are in development.
- Send all participants a post-project survey asking for their additional thoughts on the experience and collect their recommendations for training areas.
- Repeat the use of the same rubric so that changes/improvements can be tracked.