

## **Kent County Public Library Reference Policy:**

### **I. Statement of Library's Mission Statement**

We enable the people of our community to pursue life long learning through our responsive collections, electronic resources and innovative services. Our inviting public libraries are cornerstones of our communities where children and adults can experience personal enrichment and connect with one another.

### **II. Mission of the Reference Department**

It is the mission of the Reference Department to effectively meet these needs by bringing the library's resources and potential users together through a variety of services. Reference service will be provided at all times that the library is open. The Reference Desk will be staffed during the afternoon, evenings and Saturdays. The Reference desk will be staffed by professionally trained individuals who will provide quality service.

#### **Statement of Objectives:**

- To provide personal assistance without discrimination to library users seeking information.
- To select, acquire, and organize sources of information to meet the needs of library users.
- To identify and promote the information needs of potential users in the community.
- To cooperate with other community agencies and organizations in their efforts to serve the community.
- To ensure that library users receive a consistent level of service.
- To present programs and tours in the library and in the community on reference services, library use and reference sources.

### **III. Purpose of Reference Guidelines**

A. To describe the services and resources that are offered by the Reference Department which is comprised of the Reference Services staff.

B. To set standards and guidelines that ensure continuity of service.

C. To provide guidance for those working at the Reference Services and Youth Services Desks and for those being trained.

### **IV. Reference Staff**

Reference staff members, whether professional or para-professional, serve as the link between resources and the patron. As such, it is important that the staff member be:

- A. Knowledgeable about library materials and services
- B. Open and approachable; friendly but professional
- C. Able to communicate effectively with people
- D. Discreet in the handling questions which might be confidential or sensitive
- E. Able to exercise good judgement both in the interpretation of policy and in the handling of exceptional situations.

## V. Library Users

Library users are all people seeking information whether in person, by telephone, by FAX, by mail, or by electronic mail. Reference service is available to all persons served by the library without discrimination. The needs of each library user are taken seriously and treated with the utmost respect.

## VI. General Guidelines for Reference Desk Service

### A. Priorities

Service to the public receives priority over any other duties. Library users should be made aware that the primary purpose of a reference librarian is to assist them.

In-person requests for service receive priority over telephone requests. All reference questions are treated confidentially.

Although the Library's primary responsibility is to patrons within Kent County, there should be no discrimination against other patrons for basic reference service.

### B. Recording Statistics and Questions

Accurate statistics regarding service to patrons should be recorded. Staff should use the reference statistics gathering page in recording this information.

### C. Reporting Problems

If a staff member has a problem in dealing with a patron, the name and telephone number of the patron should be taken and given to the supervisor who will take appropriate action.

### D. Incomplete Reference Transactions

Although every effort is made to complete questions immediately, some can remain at the end of a shift or day. Unfinished questions will be turned over to incoming staff if the patron is in immediate need of the requested information. The patron will be given an agreed-upon time frame in which the reference question will be answered. Staff members are encouraged to consult with colleagues if they need assistance with a puzzling or difficult question.

E. Referrals to the Eastern Shore Regional Library System Services and the State Library Resource Library.

If a reference question cannot be answered in-house, it may be referred to the appropriate system service. Access to materials beyond the Library's own collection are provided through the library's interlibrary loan services.

#### Referrals to Other Agencies

Referrals to other agencies may be made when appropriate. Patrons should be advised that they may contact the library for further assistance if they are not successful in obtaining help from the agency. At no time may staff refer the patron to individual practitioners—physicians, attorneys, mental health professionals, etc.

#### Referrals to Other Libraries

If the staff member feels that it is appropriate to refer the patron to another library, it is required that the staff member verify that the material needed is actually there. If it is necessary to refer a patron to a corporate, university, or other special library, the staff member should make prior arrangements with the other library before sending a patron to that library.

#### Sources

To give the most accurate and authoritative answers possible, staff members should avoid personal opinions, philosophy, or evaluations; rather they should rely upon information based on accurate printed or online sources or learned from a reliable authority. The opinion of staff members, even when requested, should not be given as fact. The source of an answer should always be cited.

#### Instruction and Orientation Services

Instruction and orientation services in library use are an integral part of library service and may range from basic instruction on how to use the computer catalog or reference tools to more formal assistance such as tours or classes designed to increase the patron's knowledge of the library's materials and services.

#### Time Limits

No two reference questions are alike; therefore, no specific time limits can be placed on an actual question. The amount of time devoted to a question is at the discretion of the reference staff member.

### VII. Specific Reference

A reference transaction is defined as an information contact which involves the knowledge, use,

recommendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. It includes direct and instructional services. Direct service provides the patron with the information requested, while instructional service is designed to teach the patron independent use of library resources. Reference service, whether direct or instructional, provides accurate and prompt information to the public.

#### A. In-Person Reference

1. Basic Assistance - Reference staff members should assist patrons at every level of the Reference transaction, if the patron so desires. This may require accompanying the patron to the computer catalog to explain its use, or physically locating the materials for the patron. In the event that the staff member is unable to accompany the patron, ask the patron to report back to the Reference Services Desk if the material cannot be located.

2. Priority - If several people are waiting for assistance, requests that are either brief or that involve patron participation with staff guidance may be given priority over lengthy or complex questions that require large amounts of time. If a patron has a time-consuming request which is delaying service to other patrons, the staff member should offer to complete the question at a later time.

It may be necessary to work with several people at once—getting each started and then returning to make sure that they are finding their information. Additional staff should be summoned if necessary.

#### B. Telephone Reference

Telephone reference should be used for short, factual information questions which do not require extensive reading or interpretation on the part of staff members. If the answer to a telephone question seems too involved to relate easily over the telephone, this should be explained to the patron and the suggestion made that the patron come to the library.

Staff will answer the telephone with a department name, such as Reference Services or Children's. If callers must wait, they should be given the option to remain on hold or to have their calls returned. If the patron prefers to be called back, the staff member should take the patron's phone number and call the patron back as soon as possible. For calls from out-of-state, the callers should be asked to call back as a prearranged time.

When a staff member must transfer a call to another department, the caller should be told where the call is being transferred and why. When a reference staff member transfers a call to another department, the staff member should briefly convey to the other department the patron's question and what sources have been checked. When receiving a transfer call, however, always consult with the patron directly in order to fully understand the question being asked.

#### C. Fax, Mail, Electronic Mail Requests

It is the Library's practice to respond to all reasonable reference inquiries received by mail, FAX, or electronic mail. Fax, mail, and electronic requests are defined as short, factual informational questions which do not require extensive reading or interpretation on the part of staff members. If the question becomes too involved or time-consuming, the staff member should explain the limitations on such service and suggest that the patron visit the Library for further assistance.

The patron may request that the response to the question be made by fax, mail, electronic mail or telephone. The nature of the question may determine the form of response. Long Distance reference questions either through phone and fax will be answered via mail.

In the event that a photocopy is requested by out-of-area patrons, the Library will provide no more than (10) photocopied pages to a patron at no charge to the patron. Standard copyright guidelines/notice will be attached to any pages faxed or mailed to a patron. Additional copying for out-of-area patrons must be done on a cost recovery basis, with prepayment required.

## VIII Specific Questions Guidelines

### A. School Assignments

Questions regarding school assignments will be treated as any other request for reference assistance. For definitions of types of reference queries see this section, generally.

Every effort should be made to satisfactorily answer a student's questions and provide the sources for information and the instruction needed to use those sources. If every effort has been made by the reference staff member and the student to locate information without results will be encouraged to return to the teacher for further instructions or an altered assignment. A note to this effect may be given to the student if the reference staff member feels it is justified.

### B. Consumer Evaluations

The staff should help patrons locate objective consumer product information by showing them how to consult the indexes to Consumer Reports and related magazines, buying guides, and/or general indexes which may lead to product evaluations in other periodicals. Short published consumer ratings will be read over the telephone; however, in depth consumer information must be read at the library. The staff does not offer personal opinions recommending one product over another.

### C. Book, Antique and Art Appraisals

Patrons may be referred to appropriate reference sources or to consultants or experts. Staff members should never give a personal appraisal regarding the value of a patron's possession.

### D. Genealogical Questions

Staff members should provide general assistance in genealogical research, guidance in locating items in the collection, both in print and electronically. Staff members should not engage in actual genealogical research for patrons.

#### E. Translations

Translations should be provided only if a person on the staff with appropriate expertise is available.

#### F. Compilations and Extensive Research

Requests for and/or completion of lengthy research is not considered a traditional role of the public reference librarian. Research and reference differ in terms of time required, sources employed, and ease of determination of search strategies; research is the more involved of the two. Patrons needing extensive compilations (bibliographies, lists, statistics, etc.) or research should be directed to the appropriate resources and offered as much assistance as staff time allows.

#### G. Medical, Legal and Tax Questions

The library does not provide advice in the areas of medicine, law, and taxes. If legal information can be found in printed or electronic sources, it is provided. However, complicated legal searches should be not undertaken nor should personal interpretations of legal matters be offered. Concerning medical information, brief definition and descriptions from authoritative published sources may be provided. These sources should be quoted verbatim with no personal interpretation. The patron should be informed of the source from which the information is taken. Under no circumstances should a staff member offer advice in medical, legal or tax areas, regardless of how commonplace the knowledge seems to be. If more information is required, the patron should be encouraged to examine the library's collection or be referred to another source.

#### H. Mathematical Calculations

Mathematical calculations should be provided only if a person on the staff with appropriate expertise is available. Otherwise patrons should be referred to sources containing the formulas or tables necessary for them to complete their calculations.

#### X. Loan of Reference Material

The library does not loan any books or materials from the reference collection.

#### XI. Orientation/Tours

Library orientation tours, bibliographic instruction, and online demonstrations are offered by the Reference Department and arranged through the branch manager.

## XII. Bibliographic Services

When so directed, it is the responsibility of the Reference Department to prepare printed in-house bibliographies and/or bibliographic guides for subject areas of time proven or current interest which would assist patrons with their informational needs as well as promote library materials.

## XIII. Outreach

Talks to community groups are presented by professional staff on sources and services of the library.

*Approved Kent County Board of Trustees May 24, 2004*