

REFERENCE POLICY

Reference Policy

I. MISSION OF REFERENCE SERVICES

It is the mission of the library to effectively meet the information needs of the community by bringing the Library's resources and potential users together through a variety of services. Reference services will be provided at all times that the Library is open to the public.

II. PURPOSE OF REFERENCE GUIDELINES

- To describe the services and resources which are offered.
- To set standards and guidelines for service.
- To provide guidance for those working at the Reference Desk and those being trained.

III. DEFINITION OF REFERENCE STAFF

A. All staff scheduled to work shifts at the reference desk are considered to be Reference librarians for the purposes of this policy-

IV. REFERENCE STAFF

A. Staff members serve as the link between the Library's resources and the patron. As such, it is important that the staff member be:

1. Knowledgeable about library materials and services.
2. Open and approachable; friendly but professional.
3. Able to communicate effectively with people.
4. Discreet in the handling of questions which might be confidential or sensitive.
5. Able to exercise good judgment both in the interpretation of policy and in the handling of exceptional situations.
6. Successful reference transactions providing patrons with complete and correct answers are essential. The following behaviors are the most important:
Be approachable. When working at the reference desk your primary focus is reference work.
 - a. Listen attentively.

- b. Use probing questions which elicit more information from the patron.
- c. Verify the patron's question. Paraphrase or repeat the patron's question to demonstrate understanding. Ask if that is the patron's specific question.
- d. Make full use of basic tools.
- e. Cite the source.
- f. Ask the follow-up question, "Does this completely answer your question?"
- g. Staff are encouraged to participate in professional development to keep their reference skills current.

VI. GENERAL GUIDELINES FOR REFERENCE SERVICE

A. Priorities

Service to the public receives priority over any other duties.

B. Recording Statistics and Questions

Accurate statistics regarding service to patrons are gathered monthly.

D. Incomplete Reference Transactions

1. Staff members are encouraged to consult with colleagues if they need help with a puzzling or difficult question.
2. Questions that remain unanswered at the end of a staff member's desk shift may be passed on to the incoming staff.
3. Reference staff should keep patron's informed about the status of their question, if needed.

E. Referrals to Other Agencies

1. 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.
2. At no time may staff refer the patron to individual practitioners, physicians, attorneys, mental health professionals, etc.

F. Referrals to Other Libraries

If the staff member feels that it is appropriate to refer the patron to another library, it is important to verify that the material needed is actually there whenever possible.

G. Sources

To give the most accurate and authoritative answers possible, staff members should rely upon information obtained from reputable sources. The source of the answer should always be cited.

H. 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 catalogs and reference tools, to more formal assistance such as tours designed to increase the patron's knowledge of the library materials and services.

I. Time Limits

In general, fifteen minutes should be the maximum amount of time to work with a patron. However, when the staff member has time available, additional time may be devoted to the question. The time devoted to a particular reference question is dependent on the circumstances in the reference area at the time and is at the discretion of the reference librarian. The reference librarian will offer patrons the best service possible at any given time.

VII. SPECIFIC DESK GUIDELINES

A. In-person Reference

Basic Assistance:

1. Never assume that a patron knows how to locate library materials.
2. Assistance should be offered whenever a patron appears to need it. This may require accompanying the patron to the online catalog to explain how to use it or accompanying the patron to the indicated area.
3. Whenever patrons are sent to the stacks on their own, it is important to remind them to report back to the Reference Desk if they are unsuccessful in finding what they need.

Priority:

1. 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.
2. 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.
3. It may be necessary to work with several people at once, getting each started and then returning to make sure they are finding their information.

B. Telephone Reference

1. Telephone reference service should be used for short, factual information questions which do not require extensive searching, reading or interpretation on the part of staff members.
2. 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, or to email the question. If there is a line of people waiting for reference assistance, the telephone patron's request should be noted and the patron called back after the waiting patrons are served.
3. Staff will answer with "Lebanon Public Library, how may I help you?" If callers must wait for information to be located, they should be given the option of remaining on hold or being called back.
4. When a staff member must transfer a call to another department, the caller should be told where the call is being transferred and why. If the call being transferred is a reference question, the staff member transferring the call should convey to the other department the patron's question and what sources have been checked.

VIII. SPECIFIC QUESTION GUIDELINES

A. School Assignments

1. Homework is intended to be a learning experience for the student.
2. The role of the reference staff member is one of guidance in helping the student find the material or potential source of information to complete the homework assignment.
 - a. Every effort should be made to satisfactorily answer the student's question and provide the sources for information and the instruction needed to use those sources.
 - b. The student is expected to use the material in order to meet the requirements of the assignment.
 - c. The reference or children's room staff member should not write the paper for the student or organize the information into the exact configuration needed to fulfill the assignment.
 - d. Requests involving extensive research for homework projects will not be answered by telephone.
3. If every effort has been made by the staff member and the student to locate information without results, the student 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 or children's room staff member feels it is justified.

B. Consumer Evaluations

1. 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.

2. The staff should not offer personal opinions recommending one product over another.

C. Book, Antique and Art Appraisals

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

D. Critical Analyses of Literary Works

Staff members should not provide personal critical analyses, interpretations or judgments regarding the merit of literary or other works (including the patron's own writing efforts).

E. Genealogical Questions

1. Staff members should provide general assistance in genealogical research, guidance in locating items in the collection and the historical room and referral to other agencies with genealogy collections.
2. Mail or email requests for genealogical information will be answered, if the information can be located within a reasonable time. A reasonable time to search for information for a patron without results is no more than a half hour. If no information is gathered after a half hour of searching, the reference librarian should ask the patron for further details and with no further details, the search should be halted.

F. Compilations and Extensive Research

Patrons needing extensive compilations or research (bibliographies, lists, statistics, etc.) should be directed to the appropriate resources and offered as much assistance as staff time allows.

G. Medical and Legal Questions

1. The library does not provide advice in the areas of medicine and law.
2. If legal information can be found in printed sources, it is provided. However, complicated legal searches should not be undertaken nor should personal interpretations of legal matters be offered.
3. In regard to telephone requests for medical information, brief definitions and descriptions from authoritative published sources may be provided.
 - a. These sources should be quoted verbatim with no personal interpretation.
 - b. The patron should be informed of the source from which the information is taken.
 - c. Under no circumstances should staff offer advice in these areas, regardless of how commonplace the knowledge seems to be.
 - d. If more information is required, the patron should be encouraged to examine the library collection or be referred to another source.

H. Taxation Questions

Staff members should not provide advice in the interpretation of tax law or assistance in the selection of appropriate forms, or assistance in filling out forms in print or online.

IX. LOANING REFERENCE MATERIALS

Reference materials may be loaned only at the discretion of a reference librarian for reference materials in the adult collection, or a children's librarian for items in the children's room collection. Three free photocopied pages of reference sources will be provided to students.

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