

POLICY

Category: Services

Number: D.1

Title: **Reference Services Policy**

Effective Date: May 18, 2005

Authorized By: CFL Board of Trustees

Last Revision: February 26, 1998

Output Measures for Public Libraries, ALA, 1987

Information Services for Information Consumers, ALA, 1990

Guidelines for Medical, Legal & Business Responses, ALA, 1992

Reference service is an integral part of the services defined in the Cudahy Family Library's vision and mission statements. Reference service consists of personal assistance provided to users in the pursuit of information, formal and informal instruction in the use of the Library and its resources, and the provision of a wide range of information sources, including interlibrary and interagency cooperation. It is provided by our Staff to all persons regardless of age, gender, sexual preference, religion, ethnicity, English language proficiency, social or economic status, disability or place of residence. Reference service to patrons is offered with complete confidentiality and will not be discussed beyond a professional context.

There are two public service reference desks in the Cudahy Family Library, the Reference Desk in the adult area and the Children's Reference Desk in the Ladish Company Foundation's Children's Room. Due to limited funding, there may be times when the Library is open and the reference desks are not staffed. When the Reference Staff is not available, there will be signs posted to inform our patrons of the situation.

INFORMATION REQUESTS

Reference Staff are responsible for providing complete and accurate responses to patrons' questions when possible and for guiding patrons to the most appropriate resources for their needs.

Requests for information are categorized into two types of transactions, reference and directional. The American Library Association's Output Measures for Public Libraries defines the two types of transactions as follows:

Reference transaction – a request for information which involves the knowledge, use, recommendations, or instruction in the use of one or more information sources by a Librarian. Reference transactions include requests for assistance in finding facts, literature searches, and reader's advisory.

Directional transaction – a request for information which involves simple directions. Directional transactions include requests for locations of library materials and answers about the Library's rules, policies, and hours of service.

Requests for information may be made on site or received via the telephone, telefacsimile, regular mail or electronic mail. While it is the intention of the Library to accord equal effort to each inquiry, onsite requests are given priority, with telephone and mail reference questions answered after the in-person patrons are assisted. When the Reference Desk is busy, the Reference Staff will need to limit the amount of time with each individual in order to accommodate other users seeking assistance. The Reference Staff will make an effort to come back to individual users for follow-up assistance as time allows. Patrons on the telephone will be asked for their contact information and will receive a return call as soon as possible.

In responding to mail and telephone requests, Staff will give the citations for the sources used and may have to suggest a visit to the Library for additional information. E-mail reference service is available via the Library's Web site, www.cudahyfamilylibrary.org. Under normal circumstances, Reference Staff will respond to patrons' e-mail questions within 48 hours.

Copyright compliance will be adhered to in all reference transactions. Only factual information, verbatim without interpretation, will be given in response to queries. The time spent on questions may vary, due to the length or complexity of queries, the information sources available, the method of inquiry and the number of staff on duty. If the Reference Staff is unable to provide the needed information, referrals will be made to outside agencies.

Staff members assisting patrons with reference transactions will provide the information resources but will not interpret, evaluate, calculate or formulate any information. Staff members may advise patrons regarding the relative merits of sources or may make recommendations about the selection of resources, but they will not offer advice or their personal opinions about the patrons' queries. Librarians helping students will provide research assistance but will not do the actual homework assignments.

FORMAL AND INFORMAL INSTRUCTION

Reference Staff are responsible for providing formal and informal instruction in the use of the Library and its resources. The Library's resources range from the physical facility to the equipment and collections that are housed on its shelves. Tours of the Library, class visits, and program

presentations are examples of the formal training opportunities that are available upon request. Advance notice for formal group programs is appreciated and can be arranged with the Reference Staff or Library Director.

Informal instruction on the use of the Library and individual explanation of the Library's resources is available at the times the Reference Desks are staffed during service hours. Written documentation and one-on-one training is offered to assist patrons in the use of the online public access catalog and databases available through the Library's local area network. Basic assistance will also be given to patrons using the Computer Lab and other pieces of Library equipment.

INFORMATION SOURCES

Reference Staff are responsible for maintaining a general reference collection with current, accurate, and accessible information appropriate to the Library's mission and the needs of the community. These information sources shall satisfy through content, currency, format, and organization a diversity of user needs. They cover a range of standard reference works, with a balance in subject coverage across the sciences, social sciences and humanities. The general reference collection is reviewed and evaluated on an ongoing basis according to professional standards and users' needs.

Reference Staff are responsible for collecting and creating community information files to provide access to the services of local agencies, individuals, and organizations. Reference Staff are also responsible for compiling bibliographies and handouts that promote the Library's collections and serve as quick guides to sources of information.

Reference Staff will identify and use information sources and individual experts outside of the Library to obtain access to information, including the information available via the Internet. Referrals will be made to the collections of libraries that belong to the Milwaukee County Federated Library System (MCFLS) and the libraries that participate in the Library Council of Southeastern Wisconsin, Inc.

ADDITIONAL REFERENCE SERVICES

The Reference Staff provides assistance and basic instruction to patrons who are using the Library's copy machine equipment. They handle the reservation of the study rooms, appointments for use of the local history collection, distribute meeting-room-use applications, and can serve as test proctors. The Reference Staff plan displays to promote library materials and events and may select library materials for organizations which request a pick-up collection.

The Reference Staff is also responsible for the monitoring of behavior in the Library and the handling of any emergency situations that may arise.