

## **Camden County Library District Policy Manual**

### **Section 2. Operating Policies Subsection 16. Reference Policy**

The Camden County Library District serves a diverse public with unique individual needs and levels of ability to conduct research independently. At times of peak activity within the library, it is mandatory that rules for providing reference assistance be established. The most recent standards document, Missouri Public Library Standards, provides the standards for this reference policy. The Board of Trustees and Library Director of the Camden County Library District encourage staff of all levels to pursue continuing education opportunities which will enable them to better meet the needs of the library's patrons. All staff members will receive in-house training regarding appropriate responses to patron questions, including reference questions. This training includes reference interviewing techniques, reader's advisory service, and bibliographic instruction. All staff members are taught to treat each question asked with respect insofar as the level of assistance required and the topic of the question. Names of users and the transactions which occur between users and the staff are confidential and not discussed outside a professional context. All requests for information receive an answer or status report within one working day. Questions that cannot be answered with onsite resources may be referred to another agency. Such referrals are verified and/or mediated by library staff. Reference includes providing help with the catalog and library computers, reader's advisory service, database, online assistance, bibliographic verification, interlibrary loan assistance, referral services, school assignments, consumer information, and individual and group instruction.

#### **ACCESS**

The Camden County Library District will provide reference service to all its customers on an equal, non-discriminatory, and nonjudgmental basis without regard to the race, national origin, age, gender, sexual orientation, background, appearance, or personal view of the customer, making the inquiry or the subject matter being researched. With few exceptions, customers do not need to be registered Camden County Library District cardholders to use Library facilities or reference materials and services. A current Camden County Library District card or fee may be required in order for the customer to use certain library resources, including the Library's public-use computers, and to access the Internet.

#### **CONFIDENTIALITY OF REFERENCE QUERIES**

The Library recognizes that its records identifying the names of library users with specific materials, computer database searches, interlibrary loan transactions, reference queries, requests, or other specific uses of the library are confidential in nature and protected by Missouri law. This information will be disclosed only pursuant to a court order that shows cause and is in proper form as required by local, state, or federal law. Library staff will immediately refer the request for information on reference transactions to the Director or the Library's designated Information Officers. The Director, upon receipt of a court order, shall provide such information as allowed

by law. All staff is expected to honor the confidentiality of reference questions. Failure to do so is grounds for dismissal.

## **REFERENCE INTERVIEW**

The reference interview is used to help define customer needs and to answer customer questions. Staff will begin reference transactions with verification of customer needs. The structured discussion that follows should clarify questions to be answered and the best way to provide the customer with the information requested. Staff will provide a full citation of the resources used or recommended to the customer. Staff will also make referrals to other CCLD units or outside agencies as needed. The reference transaction will conclude with verification that the information need has been met.

## **PRIORITY OF SERVICE**

The Camden County Library District responds to all requests for reference and information services, whether made in person, by telephone, mail, fax, or electronic means. Individuals present in the building take first priority for service over telephone calls or other communications, with exceptions noted under Specialized Services. If the customer is present in one location and the resource needed to answer the question is in a different CCLD location, staff will respond to the referral in the same manner as if the customer was in the building.

## **LEVELS OF REFERENCE ASSISTANCE**

### **Research**

Research assistance involves the in-depth coverage of a topic. Lengthy research for individual customers, which requires extensive staff time to collect data from multiple sources, including bibliographic searches, electronic searches, copying of materials, and collating items, is not provided as part of the Camden County Library District's reference service.

### **Referral**

In providing reference service, staff will consider the system's entire collection and staff as resources. Information and materials at all locations can be shared via fax, photocopy, lending for circulation to users or in-house usage, and telephone or e-mail service. Questions beyond the expertise of a staff member or beyond the resources of that library branch will be referred to a colleague, the branch manager, or another branch within the library system. If it is not possible to find the information within the sources available through the Camden County Library District system, other libraries, agencies, and community resources may be consulted.

### **Instruction**

Camden County Library District offers basic instruction in the use of bibliographic and reference tools, whether print or electronic. This instruction may be provided to individuals or groups. In the normal course of reference assistance, customers are not required to learn how to use source materials and technologies. However, for in-depth research, staff will need to instruct customers

on using the tools and technologies to meet the customer's information needs. Staff will offer group orientations and instruction in using the library catalog, electronic products, and other resources. Staff may conduct tours appropriate to the age and interests of a group. The size and number of group tours conducted are dependent on the resources of the location and the availability of staff. Groups with scheduled appointments receive the first priority of service.

### **Assistive Technology**

Assistive technology is equipment or products that are used to increase, maintain, or improve the functional capabilities of persons with disabilities. Use of assistive technology, such as screen enlargement software and reading machines, aids staff in providing reference assistance to persons with disabilities. The extent of assistance that can be provided is affected by the nature of the disability. When further assistance is needed, staff will make referrals or consult with area agencies and organizations.

## **TYPES OF REFERENCE SERVICE**

Library staff attempt to answer all questions. However, some limits have been established for types of questions and services beyond the scope and expertise of the public library.

### **A. Appraisal of Books and Works of Art**

Published price guides for artworks, antiques, rare books, coins, stamps, currency, and other collectibles are available for customers. Staff will not provide appraisals of such works. While library staff may offer listings of appraisers or vendors, personal recommendations will not be made.

### **B. Directory Information**

Staff may provide addresses and telephone numbers to the public, where the name of the individual, company, or organization is published. This type of information is available from telephone books, print directories, electronic products, and the Internet. However, when the customer seeks "reverse information" (where the customer has a phone number or address, but not the name) or "nearby" information (where the customer has an address and wants to know who lives next door), staff does not provide the answer over the telephone. If the appropriate directory is in the collection, customers will be advised to visit the library. If the library does not have the directory desired, staff may refer the customer to an alternate source.

### **C. Computer Questions**

Staff will provide customers with a basic orientation to computer hardware and electronic products available on the Library's computers. Library staff is available to assist users with basic machinery problems and answer simple questions regarding electronic products. Depending on schedules and location, Makerspace staff may be available to work one-on-one with the public and library-supplied technology. However, in general, library staff cannot provide individual

in-depth computer training, technical assistance, or solve compatibility problems. When further information is needed, staff will refer customers to pertinent manuals, other library resources, and computer classes. Staff may assist in locating reviews, instructions, or other information about computer software or hardware. Library staff is limited in their ability to assist customers in solving problems with their own personal computers. If the library does not have the information desired, staff may refer the customer to an alternate source.

#### **D. Genealogical Questions**

General assistance with the resources of the genealogy collection is provided; however, the Library does not trace complete family histories or conduct in-depth research for customers. An indication of whether or not requested genealogy information appears in an index or in the Library collection may be given over the telephone, by mail, fax, and by other electronic means.

#### **E. Medical, Legal, Patent and Tax Questions**

Staff does not give medical, legal, patent, or tax advice. Staff may give a referral to an appropriate source for the patron to do research.

#### **F. Mathematics Questions**

Staff helps customers locate mathematic or scientific formulas, but they do not attempt to solve problems or equations.

#### **G. Tutoring Assistance**

Staff does not provide private tutoring. Referrals to appropriate literacy providers or community agencies will be offered. Tutors may arrange to meet with students in library space, as it is available.

#### **H. Editing**

Staff does not critique or edit customer manuscripts or resumes for job seekers. Referrals will be made as appropriate. Staff does not type information for the patron.

#### **I. Translations**

Staff responds to customers' requests for translations of words and phrases by using appropriate sources. Staff translations of text material that would require considerable time or that are beyond the level of staff expertise will be handled via appropriate referral.

#### **J. Picture Research**

Staff does not provide picture research to patrons. Staff may make referrals to appropriate sources for patrons to conduct research.

#### **K. Internet Resources**

Staff cannot guarantee the validity of sources on the Internet. Staff may provide information on sources that are generally deemed reliable, such as peer-reviewed journals; however, staff does not have the needed expertise to evaluate individual sources.

## **SPECIFIC DESK SERVICE GUIDELINES**

### **In-Person Reference:**

Reference questions may require reference staff to accompany clients to the online catalog/databases to explain its use or to the library stacks to help locate the material. Because no two reference questions are alike, there is no time limit to reference assistance. If there are several library users needing assistance, requests that are directional or brief in nature may be given priority over lengthy or complex questions.

### **Telephone Reference:**

Telephone reference generally falls into the Ready Reference category and should take no more than 5-10 minutes. Telephone reference questions should be limited to a reasonable number; staff will use their best professional judgment. For long and/or complex questions, staff will follow up with the library user by calling them back or another mutually agreeable means of communication.

### **Electronic Reference:**

E-mail reference questions will be answered in the order in which they are received. In-depth answers are not possible through E-mail. Staff will refer patrons to appropriate sources.

### **Reference Letters:**

All reference letters will be answered in the order in which they are received. In-depth answers are not possible through the mail. Staff will refer patrons to appropriate sources. Photocopies will be charged at the current per-page rate.

### **Electronic Databases/Internet:**

Staff will instruct and/or orient users to the online resources subscribed to by the library and made accessible through the CCLD webpage. Staff cannot guarantee the validity or accuracy of information retrieved from the Internet.