



REFERENCE POLICY

The delivery of reference service by information professionals is central to the Rockbridge Regional Library System (RRLS) mission.

This policy is intended to provide broad overall guidance to staff members who deliver reference service. The delivery of reference service requires library staff to be knowledgeable, approachable, sensitive, courteous, and efficient. Quality reference service depends upon effective interviewing, attentive listening, and connecting patrons with resources that will answer their information needs. Every request for reference assistance is considered legitimate.

This policy recognizes the need to maintain flexibility in the delivery of reference service. It is appropriate to adapt service to meet individual patron needs. Rockbridge Regional Library System reference and information services should satisfy patrons' information needs either by using sources on hand, or by referral to resources located elsewhere. Personal opinions are not a part of reference assistance.

REFERENCE AND INFORMATION SERVICES DEFINED

Reference service is the assistance given to patrons in pursuit of information.

Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs. Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements.

Reference Work includes reference transactions and other activities that involve the creation, management, and assessment of information or research resources, tools, and services.

(The following bullets clarify what is meant by terms within the Reference Work definition.)

- *Creation and management of information resources* includes the development and maintenance of research collections, research guides, catalogs, databases, web sites, search engines, etc., that patrons can use independently, in-house or remotely, to satisfy their information needs.
- *Assessment activities* include the measurement and evaluation of reference work, resources, and services.

(Reference and User Services Association - RUSA)

ACCESS

The Rockbridge Regional Library System will provide reference service to all its patrons on an equal, nondiscriminatory, and nonjudgmental basis without regard to the race, national origin, age, gender, sexual orientation, background, appearance, or personal view of the patron making the inquiry or the subject matter being researched. With few exceptions, patrons do not need to be registered Rockbridge Regional Library System cardholders to use Library facilities or reference materials and services. A current

Rockbridge Regional Library System card may be required in order for the patron to use certain library resources including subscription databases, 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.

This information will be disclosed only upon the request or consent of the individuals or groups whose library privileges are directly affected or 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 Executive Director, or the Library's designated Information Officers. The Executive Director, upon receipt of a court order, shall provide such information as allowed by law.

All staff are 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 patron needs and to answer patron questions. Staff will begin reference transactions with verification of patron needs. The structured discussion that follows should clarify questions to be answered and the best way to provide the patron with information requested. Staff will provide a full citation of the resources used or recommended to the patron. Staff will also make referrals to branches within Rockbridge Regional Library System or outside agencies as needed. The reference transaction will conclude with verification that the information need has been met.

PRIORITY OF SERVICE

The Rockbridge Regional Library System 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. If the patron is present in one location and the resource needed to answer the question is in a different Rockbridge Regional Library System location, staff will respond to the referral in the same manner as if the patron was in the building.

LEVELS OF REFERENCE ASSISTANCE

Research

Research assistance involves the in-depth coverage of a topic. The level of research assistance provided varies according to the availability of staff, the staff and patron's knowledge of the subject, the volume of other patron requests, the depth of the collection, the complexity of the question and the time frame in which the information is needed.

Lengthy research for individual patrons which requires extensive staff time to collect data from multiple sources, including bibliographic searches, electronic searches, copying of materials and collating items, is not normally provided as part of the Rockbridge Regional Library System's research assistance.

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, copies, scanning or 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 department, will be referred to a colleague, the department manager or another department/branch within the library system.

If it is not possible to find the information within the sources available through the Rockbridge Regional Library System, other libraries, agencies and community resources will be consulted.

Instruction

Rockbridge Regional Library System offers 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, patrons are not required to learn how to use source materials and technologies. However, in some cases, staff will need to instruct patrons on how to use the tools and technologies to meet the patron's information needs.

Staff will offer group orientations and instruction in the use of 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 first priority of service.

Specialized Services

A. Literacy Center Volunteer Tutors

Volunteer tutors assist elementary, middle, and high school students with school reading-related assignments.

B. Assistive Technology

Assistive technology is equipment or products that are used to increase, maintain, or improve 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 will 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 art works, antiques, rare books, coins, stamps, currency and other collectibles are available for patrons. 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 known as long as information is not private. This type of information is

available from telephone books, print directories, electronic products, and the Internet. However, when the patron seeks "reverse information" (where the patron has a phone number or address, but not the name) or "nearby" information (where the patron 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, patrons will be advised to visit the library. If the library does not have the directory desired, staff may refer the patron to an alternate source.

C. Computer Questions

Staff will provide patrons with 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 the electronic products and compatibility with regard to downloading ebooks.

Staff may provide assistance in locating reviews, instructions, or other information about computer software or hardware. Library staff is limited in their ability to assist patrons in solving problems with their own personal computers. If the library does not have the information desired, staff may refer the patron 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 patrons. 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, email, fax, and other electronic means.

E. Medical, Legal and Tax Questions

Staff may respond to medical, legal or tax questions by reading directly from the cited source or inviting the patron to use the Library's resources in person. Staff will not offer advice, interpretation, recommendation, opinion or personal experience, which is the domain of trained legal, medical, or financial professionals.

Questions involving intellectual property (law that involves patents, trademarks, and copyrights) may be addressed by offering the patron assistance with the tools needed for a preliminary intellectual property search. Staff cannot perform the search for the patron or advise the patron regarding intellectual property matters.

Staff may suggest that the patron contact an attorney or medical practitioner, an appropriate government agency or nonprofit organization, or other libraries.

F. Mathematics Questions

Staff helps patrons in locating mathematics 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 patron manuscripts or resumes for job seekers. Referrals will be made as appropriate.

I. Translations

Staff responds to patrons' 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.

Approved by the Library Board of Trustees, December 16, 2014