

## **INFORMATION SERVICE GUIDELINES**

### **I. Goals of Information Service**

Information service brings the Library's resources and potential users together through a variety of services. Information service will be provided at all times that the Library is open.

Successful information service will have our patrons leave feeling satisfied and appreciated.

### **II. Purpose of Information Service Guidelines**

- A. To describe the services and resources which are offered by the Library.
- B. To set standards and guidelines for service
- C. To guide staff members who are providing information service and those being trained.

### **III. Staff**

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

- A. Knowledgeable about Library materials and services as appropriate for his or her job description and able to exercise good judgment in referring questions to other Library Staff.
- B. Open and approachable; friendly and professional.
- C. Able to communicate effectively with people.
- D. Discreet in handling questions which might be confidential or sensitive
- E. Able to exercise good judgment both in the interpretation of policy and in the handling of exceptional situations.

New staff members will receive orientation to his or her department, the Library as a whole, and other resources as appropriate. On-going training is necessary in order to provide the highest level of service, and all staff attend information service training to explain the Library's standards of service in detail. Participation in Library activities ranging from formal instruction to informal groups sharing ideas is expected.

## **IV. Library Patrons**

Information service is available to all persons regardless of age, sex, religion, race, social or economic status, or home library. Information service is provided to everybody, including people who come to the Library, contact the Library, or use the Library website.

## **V. General Guidelines for Information Service**

### **A. Priorities**

Service to the public receives priority over other duties. Clerical tasks, conversations with co-workers and other assignments are secondary.

The order of precedence for information service is as follows:

1. In-person
2. Telephone
3. Electronic communication

The Library's standard for information service is to take the patron to whatever he or she is searching for. Every effort is made to place the desired item in the patron's hands. Staff should not point and do not stay tethered to the Service Desks; the expectation is for staff to move to where the patron needs assistance.

### **B. The Reference Interview**

The key to successful patron service is the reference interview. The purpose of the reference interview is to define the patron's information needs in terms of the Library's resources or obtain enough information to make a referral to the appropriate department, service or outside agency. In many cases, the patron's original question is too general and must be refined by additional questioning. It is important to determine the patron's time frame and depth of information needed.

### **C. Recording Statistics and Questions**

Accurate statistics regarding service to patrons should be recorded.

### **D. Incomplete Reference Transactions**

Questions that remain unanswered at the end of a staff member's Service Desk shift should be passed on to incoming staff or completed by the initial staff member. Staff members should consult with colleagues if they need help. If the requested information cannot be provided within 24 hours, the patron should be notified of the status of the request.

**E. Patron Referrals**

**1. Referrals to Other Departments within the Library**

A patron should be referred to another department with a phone call to convey the patrons question and what sources have been checked.

**2. 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. Staff will refer the patron to information about specific practitioners – physicians, attorneys, mental health professionals, etc. – but may not recommend individual practitioners.

**3. 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. That library should be called and the item placed on hold, if appropriate.

**F. Sources**

To give the most accurate and authoritative answers possible, staff members should avoid personal opinions, philosophies, or evaluations; rather they should reply upon information obtained from reputable sources. The source of the answer should always be cited.

**G. Instruction and Orientation Services**

Instruction and orientation in library use are an integral part of library service and may range from basic instruction on how to use catalogs, print and electronic resources, and equipment to more formal assistance such as tours designed to increase the patrons knowledge of the Library's materials and services.

## VI. Specific Service Desk Guidelines

### A. In-Person

1. Basic assistance – Never assume that a patron knows how to use the Library's resources or equipment. Assistance should be offered to all patrons whenever possible. Accompany the patron and assist with the use of electronic equipment, print and non-print resources, and/or in finding a particular area in the department.
2. 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. Additional staff should be summoned if necessary.

### B. Telephone

Telephone reference service is available for short, factual information which does not require extensive reading or interpretation on the part of staff members. If the answer is too involved to relate easily over the telephone, this should be explained and the suggestion made that the patron come to the Library.

Staff members should answer the phone with the name of the department and their name. If callers must wait, they should be given the option to remain on hold or to give their telephone number and have their call returned. The staff member must call back as soon as possible.

When a staff member must transfer a call to another department, the caller should be told where the call is being transferred and why. The staff member transferring a call should convey to the other department the patron's question and what sources have been checked.

### C. Other

It is the Library's practice to respond to all inquiries received, regardless of the technologies used.

## VII. Specific Question Guidelines

### A. School Assignments

Every effort will be made to satisfactorily answer the question and provide the sources for information and the instruction needed to use those sources.

If the staff is aware of a class assignment for which there are limited resources,

available circulating materials may be placed on reserve by the head of the department.

**B. Contest Questions**

Simple, factual contest questions should be treated in the same manner as all other reference questions. Some contest questions are tricky and might have more than one answer which seems to be correct. The Library does not guarantee that the answer provided is the correct answer for any particular contest. The staff should not conduct lengthy searches, interpret contest rules or do work which should be done by patrons.

**C. Consumer Evaluations**

The staff should help patrons locate objective consumer product information by showing them how to consult resources which may lead to product evaluations. The staff should not give personal opinions recommending one product or another.

**D. Book, Antique and Art Appraisals**

Patrons may be referred to appropriate reference sources. Staff members should not give a personal appraisal regarding the monetary value of a patron's possession.

**E. 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).

#### F. Recommendation of Materials

Staff members should not criticize the patron's choice of material. In recommending material, a staff member may express an opinion by discussing titles with which he or she is familiar. Staff can also suggest a variety of print and electronic sources to assist them.

#### G. Genealogical Questions

Staff members should provide general assistance with genealogical questions. Questions of a more complex nature should be referred to genealogy professionals or organizations.

#### H. Translations

Staff members should refer patron to appropriate resources.

#### I. 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.

#### J. Medical and Legal Questions

Staff members do not provide advice or interpretation in the areas of medicine and law. If information can be found in authoritative sources, it is provided. However, complicated searches should not be undertaken nor should personal interpretations or advice be offered. In regard to telephone requests for information, brief definitions and descriptions from authoritative 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.

#### K. Taxation Questions

Staff will provide access to and general information about tax forms. Staff members should not provide advice in the interpretation of tax law.