

# Brock Township Public Library



**Policy Type: Reference and Information Service**

**Policy Name: Responsibility for Reference and Information Services**

## **Intent**

Reference and Information services link people with resources in order to fulfill the informational, educational, cultural and recreational needs of the community. Staff knowledge of available resources, and skill in performing reference services is critical in meeting a community's Reference and Information needs; therefore the *Ontario Public Library Guidelines (4.2.1)* requires that a library have in place trained staff to provide answers to queries and requests for information posed by library users. This policy is to provide a clear description and guideline of management and staff responsibilities in providing information services to the community. Staff members are encouraged to use discretion, good judgment, and initiative at all times while attempting to satisfy patrons' needs for Reference and Information services.

## **Regulations**

1. The CEO is responsible for ensuring that all staff members are trained to offer effective Reference and Information services to the community. Training shall be provided in an on-going basis to ensure staff members remain current with regard to their knowledge of available resources and their skills in using such resources.
2. Reference and Information services shall be available at all times during hours of operation. Patrons may request such services in person or by phone, fax, or email.
3. All staff members shall be knowledgeable about the existence, and proper use, of print and electronic (e-Reference) Reference resources which are available in the library branch and remotely accessible on the library computers and from home.
4. All staff members shall be knowledgeable about the reference process and shall exhibit good reference interview skills. Staff members shall attempt to answer Reference and Information questions efficiently, accurately and as completely as possible, and shall assist patrons in the use of the library and bibliographic tools.
5. All staff members are encouraged to attempt to answer questions and requests for information from any library patron, regardless of age, culture, or ability; however, it is recognized that they may need to seek assistance if unable to provide a complete answer/response that is suitable to the patron.

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6. Accurate statistics regarding service to patrons shall be recorded using the BTPL Reference Statistics form. *See Appendix 1: Reference and Information Service – Reference Statistics Form.*

## Procedures

1. The CEO will regularly provide Reference and Information training at staff training days and will encourage staff members to enroll in the EXCEL Information Services and/or Electronic Information Sources modules. The CEO may also direct staff members to on-line training sources, workshops, conferences, etc. The CEO will regularly monitor the level of Reference and Information service that is provided to patrons and offer additional reference training to individual staff members, as required.
2. Staff members shall familiarize themselves with in-house print resources as well as e-reference resources which are available by remote access. Staff members shall assist patrons to locate necessary resources and to use them appropriately. Staff members shall regularly remind patrons that most e-reference resources are also available for ‘at home’ use.
3. Staff members shall exhibit good reference interview skills and behaviours, and shall employ open-ended questioning to assist patrons to properly express their information needs. Staff members shall demonstrate skill in accessing both print-based and e-reference sources to locate correct answers.
4. Library staff will attempt to answer questions as fully as possible, keeping in mind the needs of all patrons using the library. If a question proves to be time-consuming, arrangements may have to be made to contact the library patron with the answer at a later time. A possible time-frame for answering the question should be provided to the patron.
5. A question which a library staff member is unable to answer shall be submitted to another staff member, or to management. Such questions shall be noted and reviewed regularly by the CEO to assist in selecting additional reference resources, or to provide additional staff training (if required).

## History

Motion #	Date	Action (Approved, Amended, Reviewed, Revised, Replaced)
2006-12-10	Dec10.06	Approved

# Brock Township Public Library



**Policy Type: Reference and Information Service**

**Policy Name: Reference Collection**

## **Intent**

An essential reference activity includes the development of a collection that meets the reference and information needs of the community. The reference collection provides a standard group of recognized information sources that is readily available to satisfy the information needs of the community. The reference collection includes print items available in the library and also electronic reference (e-Reference) resources available, via remote access, at computer stations in the library and from home.

## **Regulations**

1. The Chief Executive Officer (CEO) shall be responsible for developing and maintaining the reference collection appropriate to the needs of the community. He/she may delegate tasks to other staff members, as appropriate.
2. Reference questions may be answered using the entire collection of the library. However, some material will be designated for reference use only within the library. Such material normally does not circulate. In exceptional circumstances, and at the discretion of manager on duty, a special one or two-day loan may be granted.
3. Brock Township Public Library, according to the Ontario Public Library Guidelines, maintains and gives service from the following specialized reference collections in print or e-Reference format:
  - a) a multi-volume encyclopedia (less than 5 years old)
  - b) a periodical index
  - c) a Canadian encyclopedia
  - d) an English dictionary
  - e) an English-French dictionary
  - f) a Canadian Almanac
  - g) a general almanac
  - h) Ontario Government Directories & Services
  - i) a general world atlas
  - j) local telephone directories
  - k) a thesaurus
  - l) a book of quotations

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3. Brock Township Public Library also maintains a limited selection of local history and genealogy materials, and Community Information.
4. The CEO shall regularly review questions which the library staff members were unable to answer to determine if additional, or different, reference resources are required.
5. Patrons who wish to offer comments or suggestions regarding the reference collection covered by this policy will be assisted to direct their concerns to the CEO.

## Procedures

1. Brock Township Public Library shall participate in provincial or regional consortium purchasing of print and e-Reference materials wherever possible.
2. Non-circulating reference materials shall be clearly marked and housed in a special area near to, or behind, the circulation desk.
2. E-Reference resources shall be accessible on circulation terminals and public access computer terminals designated for that purpose. If possible, e-Reference materials shall also be available for at home use, with links to them clearly shown on the library's Web OPAC and on the BTPL website.
3. Under exceptional circumstances, if photocopying is not a realistic or legal option, reference material may be lent out for a brief period to be returned prior to opening the next day. These loans will be made at the discretion of a senior staff member in consultation with management.
  - a. Reference material may be signed out from the Library ONLY for time periods during which the library is closed. The staff member should first determine if a circulation copy is available and that the patron's borrowing record is clear. The loan period should be as brief as possible -- overnight to two days, depending upon the next day of operation at the lending branch.
  - b. Examples of materials that may never be signed out from the library include:
    - i. Ready reference material (i.e. almanacs)
    - ii. Book or periodical indexes
    - iii. Expensive materials
    - iv. Individual volumes from the most current edition of multi-volume sets (i.e. encyclopaedias)

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- c. No more than two reference items per patron may be signed out at the same time.
- d. The fine for an overdue reference item is \$5.00 per day, up to the full cost of the item.
- e. Because of an unlimited variety and increasing number of circumstances which may affect requests for loans, each loan request should be treated as a new situation.

## History

Motion #	Date	Action (Approved, Amended, Reviewed, Revised, Replaced)
2006-12-10	Dec.10.06	Approved

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**Policy Type: Reference and Information Service**

**Policy Name: Reference Services – Resources & Technology**

## **Intent**

Reference Services assist patrons in filling real information needs. All library users have the right to access all information available in the library. All users have the right to be treated fairly, objectively, and equally. The Brock Township Public Library welcomes questions from all patrons and will attempt to answer all questions in a non-judgmental manner, exhibiting sensitivity to special needs patrons and privacy issues.

## **Regulations**

1. All patrons seeking help at the Library will be greeted in a friendly manner regardless of sex, age, ability and ethnic background, and will be treated equally, with respect and courtesy.
2. Patron confidentiality is respected, in compliance with government legislation, at all times. Patrons are not asked to identify themselves in any way before reference service is provided.
3. All questions will be considered important and legitimate, unless it becomes clearly apparent that they are otherwise. Certain questions as outlined below are subject to restrictions.
4. In addition to answering requests presented in person and by telephone, the library will also respond, in a timely manner to requests received by mail, e-mail and fax.
5. If it is not possible to find an answer using the Brock Township Public Library print or e-Reference resources, patrons will be referred to other libraries, agencies, and community resources.

## **Procedures**

1. A complete reference process, including follow-up to ensure reference needs have been met, shall be employed at all times.

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2. Answers to Directional or Facilitative Reference questions assist patrons to use the library facility more effectively. Such answers include directions for locating staff, users, and physical features in the library, provision of basic assistance or troubleshooting for using computers and other machines, explanations of library policies and procedures, hours of operation, etc. Normally, Directional or Facilitative Reference questions do not involve staff's knowledge, use, recommendation, interpretation, or instruction in the use of any information sources.
3. Answers to Basic or Quick Reference questions provide factual or substantive information on a single subject which can be provided easily and quickly, generally with reference to one or two standard information or reference sources with the inclusion of basic instruction to the patron, if required. Basic or Quick Reference questions can usually be answered quickly, using authoritative e-Reference sources and other resources kept for reference purposes at or near the Circulation desk.
4. Answers to Complex or General Reference questions demand factual or substantive information on a complex subject. Such answers which may require consultation of a variety of information or reference resources and the exercise of high-level information seeking and instructional skills. They usually require more lengthy searches and the use of a number of sources to arrive at a complete answer. Staff members will guide and assist patrons in pursuing answers to these questions while simultaneously providing, as required, informal instruction in how to search and use library resources to the best advantage.
5. To the best of their abilities, staff members will provide consultative assistance to enable patrons to properly define difficult questions, and will demonstrate alternative methods of approach. They will offer basic/simple instructions for computer processes, with the expectation that the requesting patron(s) will become self-sufficient as a result of this instruction. The level of assistance for such consultative transactions will be based upon staff time constraints and the patron's needs, capacities, and willingness to move toward self-sufficiency.
6. Research assistance for school-related questions will be answered in the same manner as all other reference questions.
7. Only simple answers can be provided for prize contest questions.

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8. Staff members shall not attempt to provide interpretation of information which requires expertise beyond the scope of their competence. Such areas shall include the fields of law, medicine, census or tax sources and evaluation or authentication of rare items. A patron will be referred to potential sources of competent information in the library, or elsewhere.
9. If a request for information cannot be answered or has been answered only in part with Brock Township Public library resources, the patron will be referred, as appropriate, to another source and assisted, if necessary, to contact that source.
  - a. Every attempt will be made to satisfy requests with print or e-Reference materials available in the library before referring patrons or inquiries to outside agencies or sources of information.
  - b. If time permits, staff may contact outside agencies or sources of information for the patron. This includes making long distance calls on a patron's behalf. If time does not allow, the name of the organization, as well as direct contact information, will be supplied if possible.
10. Requests received by telephone, fax or in writing are treated as all other requests; however if the library is busy, priority will be given to the needs of patrons who have come into the library. Telephone, fax, or email questions will then be answered when time permits. The patron will need to be called back on the principle of first come-first served, giving a realistic expectation of how long it might take to address the question.
  - c. If the staff member is unable to deal immediately with the telephone, fax, or e-mail request, arrangements will be made to return the call within an agreed upon time period. Staff members will endeavour to respond to such requests as quickly as possible, preferably on the day they are received.
  - d. Patrons needing extensive research service (extended reference) will be requested to visit the library to participate in the research process.
  - e. The extent of personal service provided to each individual depends on the number of patrons to be served and available staff time. The following priorities shall be applied:
    - i. 1st priority - requests presented in person
    - ii. 2nd priority - requests presented by telephone, voice mail, fax, or email
    - iii. 3rd priority - requests sent in by mail
    - iv. 4th priority - requests received via the interlibrary loan network
  - f. During times when personnel who lack expertise in a particular subject are on duty, a patron's question may be referred to another staff member or deferred to a manager.

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11. Staff will assist patrons in performing genealogical and local history searches to the extent of their expertise and the library's resources allow.
12. The CEO shall regularly review the Reference Statistics Form (*see Reference Services : Appendix 1*) questions which the library staff members were unable to answer in order to provide assistance and further reference training/instruction to staff members.
13. Patrons who wish to offer comments or suggestions regarding the reference services covered by this policy will be assisted to direct their concerns to the CEO.

## History

Motion #	Date	Action (Approved, Amended, Reviewed, Revised, Replaced)
2006-12-10	Dec.12.06	Approved

# Brock Township Public Library



**Policy Type: Reference and Information Service**

**Policy Name: Additional Reference and Information Services:  
(Readers' Advisory, Library Orientation,  
Bibliographic Instruction, and Student Assistance)**

## **Intent**

Brock Township Public Library provides additional Reference and Information services that will assist patrons to 1) find the information and reading materials that they require and 2) to develop the ability to use library services and technology more effectively thereby enhancing the lifelong learning needs of members of the library's communities.

## **Regulations**

1. Readers' Advisory is the activity of recommending books to readers and helping readers to identify their reading preferences. Staff members assist patrons by determining and recommending reading materials, using criteria that patrons have provided.
2. Informal library orientation, bibliographic/technical instruction, and student assistance are activities that instruct patrons to utilize the library facility and its resources and equipment more competently.
3. Formal library orientation, bibliographic/technical instruction, and student assistance to individuals or groups must be pre-scheduled, and will be provided by managers or designated library staff members as time and staff resources allow.

## **Procedures**

1. Readers' Advisory Service:  
Staff members will develop knowledge of popular authors and reading genres for all ages. Genre lists of popular reading materials for adult and young adult readers will be produced.
2. Library Orientation, Bibliographic Instruction and Student Assistance:  
Staff shall familiarize patrons with library services and give instruction, as time allows, in the use of the public access catalogue, indexes, CD-ROM products, e-Reference resources, special collections, computers, and other

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- library materials and equipment. Staff members will also instruct patrons, using the OPAC, on the creation of bibliographies for their own use.
3. Student researchers are given all information services available to other individuals and groups; however, time, resources, and financial considerations do not allow the Brock Township Public Library to amass an exhaustive collection of materials for student research papers. Students and researchers will be given instruction in the use of the available searching tools and assisted in their searches.  
 Note: An exception to this procedure exists at the Sunderland Community Library where cooperative collection development policies between public and school library staff members do, indeed, support the K-8 curriculum
  4. Bibliographies and/or Pathfinders will also be compiled at the request of agencies and community groups within the limits of available staff time. Priority will be given to material that is of general interest. All bibliographic projects must be approved by management.
  5. Staff members will check for a patron to determine if a specific desired item is held in the branch library's collection. If it is identified as a holding in the catalogue, but not immediately available, assistance will be given to the patron to place a hold on the item. If the branch Library does not own the item, assistance will be given to the patron to borrow it from another branch via the InterBranch Loan (IBL) process or from another Ontario library system via the InterLibrary Loan (ILLO) process. (*see InterLibrary Loan Policy*) Alternately, staff members will direct patrons to other available resources, or will provide sufficient information to enable the patron to purchase the requested item.

## History

Motion #	Date	Action (Approved, Amended, Reviewed, Revised, Replaced)
2006-12-10	Dec 10.06	Approved

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## Reference and Information Service: Appendix 1 - REFERENCE STATISTICS FORM

Week of \_\_\_\_\_ Year: \_\_\_\_\_ Branch \_\_\_\_\_

Type of Question	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
<b>Directional:</b> (A) In Library						
(B) Telephone/Fax						
(C) Email						
<b>Quick Reference</b> (A) In Library						
(B) Telephone/Fax						
(C) Email/Mail						
<b>General Reference</b> (A) In Library						
(B) Telephone/Fax						
(C) Email/Mail						
<b>Bibliographic/ Instructional/ Student Assistance</b>						
<b>Readers' Advisory</b>						
<b>Referral</b>						
<b>Questions Not Answered</b> (Record on Back)						