

# REFERENCE SERVICES POLICY & PROCEDURES

## INTRODUCTION:

The Berkshire Athenaeum exists to initiate, nurture and feed a passion for knowledge and learning. People of all ages will have their questions answered or have the necessary resources provided to them to discover answers for themselves.

Library clientele shall be provided with accurate and timely information, and all information requests shall be answered promptly, accurately, efficiently and courteously. Information may range from simple answers to practical questions of a factual nature, to providing the resources that will assist the patron find answers to complex questions which require considerable research, to assisting patrons in learning to use more complex resources. Local history, genealogy and community information requests are included in this role. Reference services use electronic and online resources, non-circulating reference materials, and other library holdings. For the purpose of this policy and procedural statement, reference services include not only those offered by the Reference Department, but by every library department providing service to the public.

## PURPOSE OF GUIDELINES:

The purpose of these guidelines is to assure the consistent delivery of quality information and referral services to all library users. All staff are expected to use their best judgment in situations not addressed in these guidelines.

## EFFECTIVENESS:

Effectiveness in library reference service is dependent on the expertise of library staff in conducting a thorough reference interview and in using the library's resources and collections, and on the active use of regional reference and interlibrary loan services.

## WHO IS SERVED:

Access to the Berkshire Athenaeum reference collections and information services is available on an equal basis to users of all ages regardless of place of residence. Service is provided through a variety of means: in person, by telephone, by fax, by e-mail, by the Western Massachusetts Regional Library System (WMRLS) van delivery, using the Regional Reference Support Service (RRSS) through the Springfield City Library, interlibrary loan, and by mail. First priority for service is given to in-library patrons.

## WHO SERVES:

Reference questions should be handled by one of the professional staff on duty at the time. Shelves should be encouraged to provide directional assistance to users

needing to locate sections or identified items, but should direct more complex informational requests to more experienced staff.

**MANNER *BY WHICH* USERS ARE SERVED:**

- X Public Service Attitude: Qualities of good public service include approachability, sensitivity and courtesy.
- X Telephone Etiquette: The words, inflection, and tone in answering the telephone should show a willingness to help the caller.
- X Instructing Versus Answering Requests: People come to the library for information. It is the librarian's responsibility to assure that people obtain the information they need. As appropriate, patrons should be given the choice of either having information found for them, or learning how to find it for themselves. While the librarian may offer a moderate amount of instruction, enabling patrons to become more skilled in information searching, patrons should not be required to learn how to use reference tools if all they are seeking is an answer to a simple ready reference question. Conversely, patrons must recognize that while reference personnel are available for assistance, they cannot be expected to do the research itself. Patrons requesting extensive instruction in the use of the library's electronic resources should be referred, as appropriate, to the instructional sessions offered periodically by the Reference Department.
- X Directing Versus Accompanying Users to the Shelf: Whenever possible and/or practical, staff should go with users to the shelf to find materials. When this is not possible, staff should encourage users to return to the desk if they did not find materials.
- X Overhearing a Colleague Give Misinformation: Users should leave the library with correct information. If a situation arises when staff overhear a colleague give misinformation to a user, they should tactfully offer "newer" information. Some suggested phrases to use are: "I have some new information on that..." or "I was just working on that and found..."

**REFERENCE PRACTICES:**

- X Reference Interview: Sound reference interview techniques should be practiced in negotiating all users' requests, whether the transaction is between library staff and the public, or between library staff and regional interlibrary loan or Regional Reference Support Service (RRSS) staff. Such techniques involve asking pertinent, open-ended questions to determine what the patron wants and in what form. This interview process saves time and energy for both staff and user. Some phrases to use are: "Can you tell me a little more about..." "I'm not sure I understand exactly what you want to know about..." "Could you be a little more

specific..." "Where did you hear about..." or "How do you need to use this information?" Patrons reluctant to answer these questions should be reassured with the explanation that this information helps assist them with their search.

- X Ready Reference: This service provides for brief factual answers and requires a search of not more than three minutes.
- X Telephone Information Service: Patrons may call the Reference Department (499-9488) and staff will answer ready reference questions, do shelf checks for specific titles, take interlibrary loan requests, and take reserves for titles in circulation. Because of time constraints, the library imposes a limit of three telephone requests per caller.
- X Fax Reference Inquiries: Patrons may contact the Reference Department by fax (499-9489) and staff will answer ready reference questions, do shelf checks for specific titles, take interlibrary loan requests, and take reserves for titles in circulation. The library imposes a limit of three faxed reference inquiries per patron.
- X E-Mail Reference Inquiries: Patrons may contact the Reference Department by e-mail through the library's home page (<http://www.berkshire.net/PittsfieldLibrary>) or directly to the department's e-mail account ([pittsref@cwmar.org](mailto:pittsref@cwmar.org)) and staff will answer ready reference questions, do shelf checks for specific titles, take interlibrary loan requests, and take a reserve for titles in circulation. The library imposes a limit of three e-mailed reference inquiries per patron.
- X Mail Services: Queries received by mail will receive the same attention as any other reference transaction. Requests for genealogical information beyond the scope of ready reference will be answered by form letter providing information about the genealogical research services of the Berkshire Family History Association, and a list of professional researchers in the area willing to provide more extended services for a fee. Questions about local history that involve research will receive a similar form letter and a list of researchers who will undertake such work.
- X Choice of Response Medium: Regardless of how the Reference Department receives an inquiry, staff will respond in the most practical manner (i.e. an e-mail request may generate a telephone response).
- X Service Priority: Reference staff will give first priority to persons waiting for assistance at the Reference Desk. Persons calling the Reference Department take second priority and should be prepared for delays during the library's busiest times. Patron inquiries received by e-mail, fax and regular mail will be handled in the order received, and may be "bumped" by inquiries received by in-house and telephone patrons.

- X Children: While the primary service point for youth may be the Athenaeum's Children's Library or Young Adult Department, children may have questions that could best be handled by Adult Reference Department staff using sources in the adult collections. It is important that library employees conduct a thorough reference interview with every patron, adult or child, and consider the best strategy for answering the question.
- X Referral: The Berkshire Athenaeum will make every effort to locate and deliver needed information to the user. Keeping local information files accurate and up-to-date is essential. If there is any question about the currency of information, local referrals should be verified, as appropriate, prior to giving the information to the user.
- X Citing Sources Used: The source should always be cited when providing information in response to a request received. If there is concern about how current the information is, the date of the source used should also be given.
- X Closure Statement: Staff should close a reference transaction by asking users, "Does this completely answer your question?" or "Do you need any more information?" or a similar phrase. The use of a closure statement will encourage further investigation of a question by the user.

#### TYPES OF SOURCES AVAILABLE:

The Berkshire Athenaeum has a variety of print, online and electronic sources to respond to users requests. Additional sources and services are available through the WMRLS and the reference department of the Springfield City Library.

#### HOW TO OBTAIN SERVICES OR MATERIALS THROUGH THE REGION:

If after searching the collection locally there is no satisfactory resolution to a patron's inquiry, the following options (as appropriate) should be made available:

- X Regional Reference Service (RRS): The Western Massachusetts Regional Library System (WMRLS), through the Springfield City Library, provides direct and mediated reference support to assist with inquiries beyond the scope of member library missions or collections. The contact for this service must be made by library staff, who may submit queries by phone, fax or e-mail.
- X Holds / Reserves on C/W MARS Library Items: Staff should look up needed book information on the C/W MARS system to determine whether the item is owned by the Athenaeum (and if so, what is its "charge" status). If the Athenaeum does not own the material, staff should determine whether another title on the subject would satisfy the patron. Holdings of other libraries should be

searched to facilitate the holds process. While non-residents may be encouraged to seek this service through their local library, reserves / holds are available to all registered borrowers. The user may also be given the opportunity of visiting the other member library identified on the C/W MARS database to pick up the item rather than waiting for the item through normal interlibrary loan procedures (see INTERLIBRARY LOAN POLICY & PROCEDURES). Patrons should be encouraged to call ahead to a library to verify that the book is indeed on the shelf prior to traveling to that site to pick up an item.

#### PATRON REQUESTS FOR SPECIALIZED INFORMATION:

- X Assignment-Related Questions: Questions involving school assignments will receive the same time and attention as other reference questions. Assistance will be given provided it does not obviously defeat the intent of the assignment. Students coming into the library will receive the same reference service as any other users, however staff should recognize that for the most optimum educational benefit it is often the intent of the instructor to have students complete their own research. Whenever possible, to facilitate the reference interview, library staff should view the class assignment sheets, and should share common assignment topics with other library staff.
- X City / Criss-Cross Directories: Information will be given over the phone as printed, or from appropriate online sources, with date and source cited, if available. Nearbys will be given if specifically requested. Such information will be limited to the parameters established for Telephone Information Service.
- X Contest and Puzzle Questions: Questions involving contests and puzzles will receive the same time and attention as other ready-reference questions. Patrons coming into the library will be shown likely sources for further information.
- X Consumer Information: For telephone inquiries, information read will be brief and should include the date of the information and the specific product or model described or tested. The user should be encouraged to come to the library to examine the full report for information on all the products being rated. Recommendations and/or value judgments should not be made for any item. Such information will be limited to the three-minute ready-reference time limit.
- X Community Information: The Berkshire Athenaeum is a major resource for the dissemination of community information through continually updated in-house and online files containing contact persons, addresses, phone numbers, and other pertinent information about local agencies, clubs, organizations, local officials, and town services. Before referrals are made to a local or national agency whose citation is at all questionable, the librarian should call them first to verify the currency of the information. Community bulletin boards should also be updated as needed.

- X Genealogical and Local History Information: Ready-reference questions will be handled by the Local History Department over the telephone using the same time constraints as indicated above. Users should come to the library to obtain further information. Local History Department staff members will provide general assistance with the resources of the library's local history and genealogy collections, however they should not engage in genealogical research. That is the individual's responsibility.
- X Berkshire Authors and Melville Collection Information: Brief reference queries relating to Berkshire authors and Herman Melville will be treated as other reference questions. The staff will also answer questions pertaining to the scope, description and content of these special collections, and will provide copies of unique materials (at cost plus postage) whenever possible. In-depth searches of these collections, however, cannot be undertaken by library staff (see LOCAL HISTORY, GENEALOGY AND LITERATURE SERVICES POLICY).
- X Legal Information: Legal questions will be treated like any other reference question provided that they do not require legal advice or interpretation. Staff should inform patrons about the legal resources available at the Athenaeum and should also provide referrals as appropriate to the Berkshire County law library located across the street at the courthouse.
- X Tax Information: The library participates annually in the tax form distribution program. Specific tax questions will be treated as any other reference question. Requests for the printing out of specific tax forms from the federal and state websites will be honored for patrons who can provide the form number or exact title. Printouts will be subject to the library's computer printout charge policy as outlined below. Patrons will be informed, as appropriate, of all relevant local resources. Further referral may be made to State and Federal tax offices. Tax advice or interpretation is not given.
- X Medical Information: For telephone inquiries, correct spellings, brief dictionary or descriptions from published or authoritative online sources are provided. The sources will be quoted verbatim with sources and date cited. Staff do not provide medical advice, interpretation, evaluation, or assistance in self-diagnosis. Drug information will not be made on the telephone based on physical description. Patrons should be encouraged to contact their physicians, pharmacists or other health professionals.
- X Obituaries: The time involved in locating information from obituaries varies according to format and time period. If the information can be found quickly, it should be read over the telephone or a callback offered. The library shall respond to requests for copies of obituaries to be mailed to an out of the area address

provided sufficient identifying information is supplied. Applicable service charges shall apply.

- X Borrower Information: The Commonwealth of Massachusetts, along with forty-seven other states and the District of Columbia, has laws<sup>1</sup> protecting the confidentiality of library records. The contents of a borrower's file is not available to the public, and staff will not answer questions that would jeopardize that confidentiality (i.e. "Who has [title of a book] now?").

#### SERVICE CHARGES:

- X Photocopies (in-house): \$.10 per page (for letter, legal or ledger sized copies).
- X Photocopies (requests generated off-site by phone, mail, e-mail or fax): Minimum charge of \$2.00 will be applied to all requests (except obituaries) of five pages and under, covering both photocopy and postage expenses. Requests for over five pages will be charged an additional \$.25 per page.
- X Photocopies – Obituaries (requests for obituaries generated off-site by phone, mail, e-mail or fax): Minimum charge of \$2.00 per obituary will be applied to all requests, covering both photocopy and postage expenses.
- X Paper Copies of Microform: \$.25 per page.
- X Computer Printout Charges (from public Internet and/or CD ROM workstations): First five pages free. \$.10 per page or partial page in excess of the initial five pages.

#### APPROPRIATE PUBLIC BEHAVIOR:

- X Food: To protect the resources of the Berkshire Athenaeum from accident or abuse, there can be no food, drink or smoking materials allowed in the reading and other public services areas.
- X Quiet: To assure that the reference and other reading areas of the library are places where study and research can take place, staff must require users exercise restraint in talking and other noise generating activities. The library does have designated areas where quiet is more enforced than others.

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<sup>1</sup> MGL Chapter 78, Section 7