

# **Access to Services**

## **AS 100 Reference Services**

*Revised: 1/98*

### **Service Philosophy and Library Ethics**

1. Every contact with the public is an opportunity to engender positive attitudes about the library.
2. All reference and information questions will be handled with equal effort regardless of the originating source (walk in, phone, mail).
3. Oklahoma law protects the confidentiality of library users' records.

\* Reference services are also confidential. Staff are not to discuss customers, their borrowing habits or their information requests except as required in seeking assistance from other library staff to find the desired information.

4. Library staff will refrain from discussions of personal issues and opinions regarding library matters when on duty in public service areas.
5. Our intent is to comply with the system's declared policies on access to materials and information as stated in the Citizens' Bill of Library Rights and its interpretations and the Freedom to Read Statement.
6. The library system expects a high level of professional competence of all staff in providing accurate and complete responses to inquiries. Staff should be especially aware of potential legal liability for conveying inaccurate information.

\* The "Confidentiality of Library Users' Records" law is Section 1, Chapter 81, O.S.L. 1985 (65 O.S. Supp. 1985, Section 1-105). Its provisions appear on signs posted in all library public service areas. Librarians should also be familiar with Oklahoma's Open Record Act.

### **Reference Interview/Courtesy Standards**

Library staff will assist customers and other library staff in a friendly, courteous and supportive manner according to MLS Service Philosophy, Library Ethics and Reference Interview and Service Guidelines.

#### In Person:

- Maintain awareness of customer approach by watching or looking up frequently; do not appear too busy to answer questions.

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- Acknowledge the customer by making eye contact, smiling or issuing a friendly greeting. Remain courteous at all times.
- Use basic terms and language (avoid library jargon) and ask open-ended questions.
- Give full attention to the customer.
- Listen carefully and paraphrase customer's request to ensure understanding ask clarifying questions while respecting the customer's privacy.

### By Phone:

- Answer the phone in a timely manner.
- Identify area and self.
- Give the caller a choice before putting him/her on hold.
- Promise specific action and confirm agreement for action and follow through.
- Cite sources over the telephone to the customer.
- End conversation with an appropriate courteous closing.

The following policy guidelines are not rigid rules or strict limitations. They should be interpreted and applied with professional judgment and professional conduct in serving the library's public.

## **MLS Reference Service**

Library staff will assist customers in person, by phone or by mail to locate and/or obtain materials or information. They will interpret library resources, policies and procedures for customers. They will assist and instruct customers in the use of indexes, library equipment and tools (PAC, MARS, copies, Reader/Printers and Internet). Staff will conduct searches and answer reference questions utilizing all resources available.

## **Reference Service - Standard Procedures**

All requests are of equal importance. If the telephone rings while you are helping a customer, allow the automated system to answer. Respond to the automated system message as quickly as possible. Libraries without voice mail need to establish individual procedures.

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If a customer appears while you are engaged in a telephone conversation, acknowledge customer's presence with a nod or hand signal and end the phone conversation as quickly as possible.

Work performed at the reference desk should not become a barrier to the public; never appear too busy to be interrupted.

Walk through the agency when possible and volunteer your assistance. Be available whenever a customer needs help in locating materials or instructions in the use of tools and resources.

An attempt should be made to satisfy the information request using resources available at your library first. Do not automatically refer customers to other libraries or sources outside your library.

When desired information is not available at your agency, make appropriate referrals.

### **Reference Service - Parameter Guidelines**

1. The limit of reference service will vary. Exceptions may be made depending on how busy the agency is and the specific needs of customers. The reference staff's main functions are guidance, direction, instruction, and information delivery. The amount of time necessary to perform these functions will depend on and vary according to the following variables:
  - Customer's time limit.
  - Customer's ability to comprehend instructions.
  - Complexity of materials to be used.
  - Number of customers needing assistance.
  - Number of staff available to help customers.
  - Equipment/resources available.
2. Due to the large number of customers that need to be served, reference staff will spend no more than 15 minutes per customer without checking the reference desk status.
  - In-Library Service: If questions cannot be answered in a reasonable amount of time, supply possible sources and return periodically until customer can work

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independently. Offer to contact the customer later to allow more time for a reference search.

- Telephone Service: Depending on the complexity of the question, the customer will be given the option of a call-back, coming to the library for assistance, or referral to another agency.

### **3. Processing a reference request:**

- Accept three reference questions per customer. (I.e. book title, stock quotes, phone numbers, reserves placed, etc.)
- Cite the source for all information given.
- Complete callbacks the same day if possible.
- Make only collect calls for long-distance callbacks.
- Maintain customer privacy by providing only library name and telephone number when leaving messages for customers.
- Limit photocopy requests by telephone to 3 articles or 6 pages per customer. Advise customer of the copy fee schedule and time frame for delivery.

## **Reference Service - Special Approaches**

When providing the following information, the librarian may read the information and indicate the source, but the customer must interpret the information. The librarian may indicate to a customer that he/she does not have the specialized knowledge to give absolute answers and advise the customer to examine the material.

Current criss-cross and city directory: Customers need to visit the library for current city directory and criss-cross requests. Older editions (1905 to 1997-not complete set, check for specific years) are located at the Downtown Library.

School assignments: Students at all levels should receive the same service as anyone else according to the general guidelines for service.

Contest questions: Simple, factual questions are answered over the telephone. Otherwise, the customer should be invited to come to the library to use the necessary source material.

Consumer information: Be careful about giving answers to consumer questions. Customers asking for product ratings in such sources as Consumer Reports may be given

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the brand names and model numbers of products rates. If a customer asks for information on a specific product, the evaluation may be read. Customers should be encouraged to read the entire article. Such limitations as the date and context of the rating should be pointed out. Personal opinions and interpretations should not be given.

Evaluation of dictionaries, encyclopedias, etc.: The library does not recommend one dictionary or encyclopedia over another. The customer may come to the library to examine the various dictionaries and encyclopedias in the library's collection.

Values of art works, antiques, rare books, coins, stamps, currency, etc.: Appraisals of the value of art works, antiques, rare books, coins, stamps, currency and other collectibles are never given. Sources are available that give prices.

Medical, legal, statistical and technical information: The librarian should not interpret material of any type related to these fields, including tables, charts, equations, conversion formulas, laws, taxation and regulatory information, or legal and medical definitions.

Patent and copyright searches, etc.: Patent and copyright searches are not performed by library staff, nor does staff attempt to ascertain whether a published work is in the public domain. Appropriate referrals are made to ODL or OSU.

Genealogies and census microfilm: Genealogies are not prepared for customers by library staff. Basic resources are offered to the customer on how to begin genealogical research. Customers who wish to research person who lived in Oklahoma City may use the system's collection of city directories or the microfilmed "Daily Oklahoman." Referrals can also be made to the Oklahoma Historical Society, which hold a large selection of historical census records on microfilm. The Internet has genealogical resources and bookmarks have been placed in the System Bookmarks file. Census microfilm may be ordered by the customers for use at Belle Isle, Downtown, Ralph Ellison and Southern Oaks and must be used within the library.

Foreign languages: Foreign language translation requests are referred to such sources as Foreign Language Departments of colleges and universities.

Mathematical calculations: Library staff should not do mathematical calculations for customers. Information from tables and formulas can be read, but customers should do their own calculations.

Tax forms: The library does not provide tax forms. Customers should be referred to the appropriate state or federal agencies. They may use the Internet to do their own searches. Staff will not print tax forms from the Internet.

Inquiries by mail: This is third in priority. Under the direction of the supervisor of the unit, when the mail request requires more than a cursory search, an attempt to answer mailed

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requests will be made within 20 working days. Customers will be invoiced at the rate of 25 cent per page for photo copying and \$3.00 shipping and handling. All correspondence should:

- Give source of information.
- Be copied and retained for a minimum of one year.
- Include name and department of person answering the inquiry.
- Electronic Reference Services: CD-ROM, On-Line Databases, Special Reference Service
- Staff are to be familiar with the CD-ROM holdings, on-line databases and special reference services of MLS libraries and are to use their best judgment when referring customers to other libraries for searches.
- Libraries may choose to batch these services due to time constraints, skill level and
- Specialization of the search.
- Each library may have a limit to the number of pages that will be printed. Customers with a library card will have charges debited to their prepaid account.
- Information will not be downloaded or saved to floppy disks.

## **Internet Service**

Internet Service: The Metropolitan Library System functions only as a "gateway" to Internet access.

The Internet is an unregulated source and the library system is not responsible for information provided. The Internet and the available resources in its global electronic network may be erroneous and out-of-date. The Metropolitan Library System is not responsible for the accuracy or currency of information presented on the Internet.

As with all reference services, the reference interview will help staff determine whether or not the Internet would be an appropriate source for a customer.

Staff are to be willing to assist customers with a search or to perform a search. If the requested information is not found within 15 minutes, staff may recommend that the

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customer visit one of the libraries offering public Internet access and work with an Internet Coach.