

# POLICY

Category: Services

Number: D.03

Title: **Reference Services Policy**

Effective Date: November 14, 2020

Authorized By: CFL Board of Trustees

Last Revision: September 7, 2019; February 2, 2019; July 7, 2012; May 18, 2005

References: Reference & Users Association, ALA Division, 2019

Information Services for Information Consumers, revised, ALA, 2000

Guidelines for Medical, Legal & Business Responses, revised, ALA, 2001

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Reference service is an integral part of the services defined in the Cudahy Family Library's vision and mission statements. Reference service consists of personal assistance provided to users in the pursuit of information, formal and informal instruction in the use of the Library and its resources, reader's advisory services, and the provision of a wide range of information sources, including interlibrary and interagency cooperation. It is provided by our Staff to all persons regardless of age, gender, sexual preference, religion, ethnicity, English language proficiency, social or economic status, disability or place of residence. Reference service to patrons is offered with complete confidentiality and will not be discussed beyond a professional context.

There are two public service reference desks in the Cudahy Family Library, the Reference Desk in the adult area and the Children's Reference Desk in the Ladish Company Foundation's Children's Room. There may be times when the Library is open and the reference desks are not staffed. When the Reference Staff is not available, there will be signs posted to inform our patrons of the situation.

## INFORMATION REQUESTS

Reference Staff are responsible for providing complete and accurate responses to patrons' questions when possible and for guiding patrons to the most appropriate resources for their needs. Requests for information may be made on-site or received via the telephone, telefacsimile, regular mail, social media, or electronic mail. While it is the intention of the Library to accord equal effort to each inquiry, on-site requests are given priority, with off-site reference questions answered after the in-person patrons are assisted. When the Reference Desk is busy, the Reference Staff will need to limit the amount of time with each individual in order to accommodate other users seeking assistance. The Reference Staff will make an effort

to come back to individual users for follow-up assistance as time allows. Patrons on the telephone will be asked for their contact information and will receive a return call as soon as possible.

In responding to off-site requests, Staff will give the citations for the sources used and may have to suggest a visit to the Library for additional information. E-mail reference service is available via the Library's Web site, [www.cudahyfamilylibrary.org](http://www.cudahyfamilylibrary.org). Under normal circumstances, Reference Staff will respond to patrons' off-site questions within 48 hours.

Copyright compliance will be adhered to in all reference transactions. Only factual information, verbatim without interpretation, will be given in response to queries. The time spent on questions may vary, due to the length or complexity of queries, the information sources available, the method of inquiry and the number of staff on duty. If the Reference Staff is unable to provide the needed information, referrals will be made to outside agencies. Patrons can not expect to work exclusively with a particular staff member on reference queries due to staffing levels.

Staff members assisting patrons with reference transactions will provide the information resources but will not interpret, evaluate, calculate or formulate any information. Staff members may advise patrons regarding the relative merits of sources or may make recommendations about the selection of resources, but they will not offer advice or their personal opinions about the patrons' queries. Librarians will not engage in conversation or debate of a personal nature, including but not limited to religious beliefs, political positions, social and ethical issues or their own personal lives. Librarians helping students will provide research assistance but will not do the actual homework assignments. Reference staff also can not provide editorial, typing, tutoring, or translation services.

Questions concerning Library policy should be answered by referring to approved written policy statements. If the patron has additional questions or concerns after reviewing the policies, he/she should be referred to the Library Director for further assistance.

### FORMAL AND INFORMAL INSTRUCTION

Reference Staff are responsible for providing formal and informal instruction in the use of the Library and its resources. The Library's resources range from the physical facility to the equipment and collections. Tours of the Library, class visits, and program presentations are examples of the formal training opportunities that are available upon request. Advance notice for formal group programs is appreciated and can be arranged with the Reference Staff or Library Director.

Informal instruction on the use of the Library and individual explanation of the Library's resources is available at the times the Reference Desks are staffed during service hours. Written documentation and one-on-one training is offered to assist patrons in the use of the online public access catalog and resources available through the Library. Basic assistance will also be given to patrons using the Computer Lab, Chromebooks, and other pieces of Library equipment. Reference Staff will assist as they are able in helping patrons with computer applications and will refer patrons to appropriate print sources, online tutorials, or classes for further assistance. When assisting patrons with computer resources, Reference Staff will not enter personal information for patrons.

## INFORMATION SOURCES

Reference Staff are responsible for maintaining a general reference collection in both print and electronic formats, with current, accurate, and accessible information appropriate to the Library's mission and the needs of the community. These information sources shall satisfy through content, currency, format, and organization a diversity of user needs. They cover a range of standard reference works, with a balance in subject coverage across the sciences, social sciences and humanities. The general reference collection is reviewed and evaluated on an ongoing basis according to professional standards and users' needs.

Reference Staff will identify and use information sources and individual experts outside of the Library to obtain access to information, including the information available via the Internet. Every effort will be made to use reliable and accurate online resources when responding to reference requests. Referrals will be made to the collections of libraries that belong to the Milwaukee County Federated Library System (MCFLS).

## ADDITIONAL REFERENCE SERVICES

The Reference Staff provides assistance and basic instruction to patrons who are using the Library's equipment. They handle the reservation of the study rooms, appointments for use of the local history collection, distribute meeting-room-use applications, handle remote printing and computer guest passes, and can serve as test proctors (see Exam Proctoring Policy, D.08). The Reference Staff plan displays to promote library materials and events and may select library materials for organizations which request a pick-up collection.

The Reference Staff is also responsible for the monitoring of behavior in the Library and the handling of any emergency situations that may arise.

