

**SAVANNAH STATE UNIVERSITY
ASA H. GORDON LIBRARY
REFERENCE POLICIES AND PROCEDURES MANUAL**

Reference Services Guidelines

Revised June 2016

Introduction

The purpose of the REFERENCE POLICIES AND PROCEDURE MANUAL is to acquaint library staff and new personnel with the services, policies, and procedures of the reference department. It is designed to serve as a guide and a training manual to which those concerned may refer at any time. The manual will be available to any library user who may have a question about the reference policies. The manual will be reviewed periodically by the reference staff to ensure that changes are made when necessary. The department must provide information to assist students, faculty, and staff in the areas of research and instruction. As an integral part of the Savannah State University Library, the basic function of the reference department is to provide accurate information to library users. Aside from "ready reference" questions, the reference staff will provide guidance in locating information. The reference librarian will exercise judgement in determining the need in specific situations.

I. Mission Statement

The mission of the reference staff of the Savannah State University Library is to provide accurate information or materials in response to user requests in an efficient, courteous, friendly, impartial, and timely manner.

II. Purpose of the Guidelines

- A. To ensure that all users of the Asa H. Gordon Library receive a consistent level of service based on uniform procedures.
- B. To ensure that information service procedures are well defined for staff.
- C. To provide a basis for training and evaluating staff performance.

III. Philosophy of Service

- A. All patrons are to be treated with equal attention to his/her particular needs. All requests for public information are legitimate and all questions **must** be either answered or redirected.
- B. The basic function of the reference librarians is to provide information, not opinions. Questions should not be answered on the basis of personal experience. It is the librarian's responsibility to provide information in an impartial and businesslike manner, even when contrary to personal beliefs.
- C. Reference services librarians subscribe to the Librarian's Code of Ethics.

IV. General Guidelines

Assisting students and faculty is the primary purpose of library reference/information services at Savannah State University. A good public service quality includes: approachability, being knowledgeable and a broad general understanding of life, a courteous, friendly attitude, and an ability to work with people of varied and diverse backgrounds, and an ability to be non-judgmental and open-minded in the pursuit of information.

- A. Reference Interview
 - Reference Interview techniques should be used at every available opportunity. This enables staff to more effectively and accurately respond to the question or

information requested. This should not be misconstrued as an opportunity to seek personal information about a patron.

- The Reference Interview allows the librarian to assess the customers' requirements and abilities and appropriately identifies materials, databases, and websites to match their needs.
- Use of open-ended questions that cannot be answered with a "yes" or "no" and force a more substantial response should be considered:
 - What type of information would be most useful?
 - What sources have you already examined?
 - How much information do you need?
 - When do you need this information?
 - What can you tell me about how you will use this information?

B. Verification of Answers

In order to provide accurate and authoritative information to patrons, reference librarians should always cite the source of information given.

V. Responsibilities of the Reference Librarians

A. Primary Responsibility

The primary responsibilities of reference librarians are to provide information and to instruct library patrons in the use of the library and its resources. At Asa H. Gordon Library, there are currently seven professional librarians on staff, covering the reference desk for a total of 82 hours including weekends and providing professional assistance to patrons in search of information for whatever reason, and also making information accessible via chat, e-mail, texting, and telephone. Additionally, the librarian is responsible for retrieving materials, assisting with research choices of materials, teaching library instruction classes as a part of the library's information literacy program, serving as a liaison librarian, and planning in-house workshops, programs.

D. Professional Duties

1. Supervises the daily planning and overall operation of the reference department.
2. Maintains desk coverage, which includes such activities as providing reference information, bibliographic assistance, computer and technical assistance, help with printing and copying, e/Learning questions, IM/chat/texting, email, telephone reference and informational questions, answering informational and directional questions, and conducting consultations as needed.
3. Teaches and promotes library instruction, library orientation, individual and class instruction, and use of online catalog and data bases.
4. Assists with collection development as related to the reference collection and the overall collection.
5. Provides assistance and guidance on how to use the library collections and electronic resources.
6. Prepares annual reports and collects important statistics as necessary.
7. Acts as a liaison for academic departments, and assists faculty with collection development, programs, and campus outreach activities.
8. Prepares subject guides and tutorials for reference sources and research.

VI. Reference Desk Procedures and Responsibilities

A. Attitude

Staff should be approachable and visible so that all patrons feel comfortable in seeking assistance. Reference librarians should be friendly, courteous, professional, efficient, and knowledgeable.

B. Responsibility for Reference Services

The accountability for reference and information service resides at the Reference Desk. All questions other than those that are directional and general OPAC searches **must** be referred to the Reference Desk. All staff, including library work-study students should follow this practice.

C. Other Work at the Reference Desk

Work performed at the Reference Desk should not interfere with approachability. The reading of materials that suggests a frivolous use of the librarian's time should be avoided. Using desk time for purely personal interests is prohibited. Discussions and debates over interdepartmental / campus issues and concerns are discouraged. Reviewing new materials and professional literature and taking care of other work related duties are permitted. Should it become necessary to leave the desk uncovered for more than a few minutes, a sign asking patrons to seek help at the Circulation Desk is placed at the Reference Desk.

VII. Reference Techniques

- A.** Reference librarians on desk duty must be constantly aware of how approachable they appear to patrons who are in need of information. In many cases, it may be the patrons' first visit to the library. Therefore, it is necessary that one provides friendly and efficient service, and projects a positive image. The following behavioral traits can help patrons feel more comfortable:
1. Reference librarians should always be aware of patrons who need help but hesitate to ask for assistance.
 2. Librarians should always look up and make eye contact. Do not become so engrossed in other work that you forget to see your patron.
 3. When patrons approach the desk they should be greeted pleasantly with "May I help you?"
 4. When listening to a question, use appropriate techniques such as eye contact, nodding and attentive phrases.

VIII. Monitoring the Service**A. Time Spent with Patrons**

The amount of service given to a patron depends on such factors as how busy it is at the desk and availability of staff, etc. What is practical at one time may not be the same at another time. It is important that an effort be made to provide adequate service. Some guidelines to follow:

1. Always suggest some source to be used such as the online catalog, Galileo, a reference book, or the Internet.
2. If the patron is unfamiliar with the sources, the librarian may want to suggest that he/she makes an appointment with a reference librarian for further assistance.
3. If the librarian is unfamiliar with what sources might be available and wishes to investigate later, he/she might make an appointment for a later time.
4. Another staff member may know an alternative resource; therefore librarians should confer with each other when answering a complex question. It is acceptable to refer the patron to other resources either within, or outside the Savannah State University Library.

B. Time Spent with Patrons

Ten to fifteen minutes is a reasonable amount of time to spend with one patron. Five or less is appropriate if others are waiting. Additional time may be spent with patrons who have special

difficulties, or no library user skills. Consultations may be scheduled for individuals or groups for in-depth or complex research assistance.

IX. Instruction vs. Answering Questions

- A.** Formal instruction in the use of the online public access catalog, electronic databases, and the reference collection should be a routine part of reference services. Reference librarians should be alert to questions that indicate a need for library instruction. There are three indications for a need for library instruction. They are as follows:
1. A patron is looking for research or information to fulfill the requirements for a paper, speech, or project.
 2. A patron is looking for specific information.
 3. A patron is unfamiliar with the library and wishes to learn how to use specific reference tools.
- B.** Reference librarians should be cognizant of questions indicative of class assignments where formal library instruction for the entire class is needed. The librarian should request a copy of the instructor's syllabus with the assignment requirements. A copy should be left at the reference for use by all librarians.
- C.** It is the responsibility of the librarian to give users the choice of either having the information found for them, or learning how to find it for themselves.
- D.** Whenever possible librarians should accompany patrons to the stacks to retrieve materials if they are unfamiliar with the LC call numbering system.
- E.** When overhearing a fellow staff member give misinformation, one can tactfully offer better or newer information. Patrons should not leave the library with incorrect information nor should staff ever embarrass one another. Some suggested phrases are:
1. "We have some new information on that..."
 2. "I was just working on that and found..."

X. Daily Statistics

- A.** It is the responsibility of reference librarians scheduled for desk duty to keep an accurate record of inquiries at the desk. Each reference question is recorded in the daily statistics database (Desk Tracker) located on the reference desk computers on both the first and second floors. Refer to the **Desk Tracker User Guide** for information about entering data and how to generate and understand reports.

XI. Telephone Reference

A. Telephone Reference

1. General Guidelines

Telephone reference service is usually limited to supplying the kind of information that is readily available, does not require extensive searching, and which may be accurately imparted over the telephone. If the question cannot be answered within 3-5 minutes, the caller (student/faculty) should be asked to come to the library for assistance, or if appropriate the question may be taken as a call back. If the caller has a legitimate problem getting to the library, librarians' judgment should be used in adjusting these guidelines.

2. Call-Backs

A callback is defined as a question, which can be answered appropriately by telephone but requires more than 3-5 minutes to complete. If there is insufficient time to answer the question while the caller waits:

- a. Take the caller's name and telephone number and call when the information is available.
- b. The librarian taking the question is responsible for completing it and calling back, unless other arrangements are made.
- c. Patrons should be called back within 24 hours unless specific arrangements are made. A call back should be made even if no information is found.

B. Mail/E-Mail/Virtual Reference/Texting Requests for Information

1. General Guidelines

It is the library's policy to respond to all reference inquiries received by mail, e-mail, text messaging and chat. These requests fall under the same guidelines as in-house and telephone requests for information.

2. The method of communication changes in the online environment. Librarians are required to acquire a set of special communication skills to effectively and efficiently communicate with users. In chat reference, no visual or audio cues are available and librarians can only communicate with users by the exchange of written messages.
3. Chat reference librarians should be prepared to respond quickly and calmly to unexpected encounters in a chat session such as the disappearance of users, the failure of technology, etc. and be able to effectively use chat software.
4. In order to serve users well in the online environment, reference librarians should have the mindset of customer services representatives, respecting their users and keeping in mind that they deserve high-quality services, and always exhibit a good understanding of the customer service ethic.

XII. Reference Materials/Collection and Location

- A. The reference collection contains general and specific, print and non-print materials, including reference materials by and about African Americans. Additionally, library patrons have access to the World Wide Web and Galileo, and other electronic reference sources.
- B. The ready reference collection is located in the Reference Room on the first floor of the library.
- C. The online public access catalog is located at all computer terminals, including the reference desk computer and can be accessed via the library's web site: <http://library.savannahstate.edu>. The library's on-line catalog is an integral part of the library's collection and is used to effectively find both print and electronic materials for library patrons.
- D. *GALILEO* a project sponsored by the Board of Regents of the University System of Georgia is a World Wide Web-based virtual library, and provides access to multiple information resources, including secured access to licensed products. Participating institutions may access over 200 databases indexing thousands of periodicals and scholarly journals. Over 2000 journal titles are provided in full-text. Other resources include encyclopedias, business directories, and government publications.

XIII. Circulation of Reference Materials

- A. Reference materials do not circulate. Exceptions should be made only on rare occasions when there are extenuating circumstances. The permission of the Director is required.

XIV. Patron Complaints about Library Materials, Staff, Services, etc.

- A. Complaints received at the Reference Desk always merit careful consideration. Every effort will be made to offer a reasonable explanation of reference services and the patron's expectation. If necessary, the person making the complaint should be referred to the Director.

XV. Reference Collection Development

A. General guidelines

The collection development policy for reference materials follows the collection development policy of the Asa H. Gordon Library.

It is intended that librarians will meet with faculty in each college upon requests for their appropriate disciplines and encourage their on-going participation in the library's collection development program.

B. Collection Assessment

It is essential that the library's reference collection both print and electronic be periodically (at least annually) evaluated to determine whether or not the collection is fulfilling the needs of the academic community, to determine its deficiencies, and update with new and current materials as required.

C. Collection Development-Electronic Formats

1. For stated purposes of this document, "electronic format" refers to those categories of materials, which require computer access, either through a microcomputer or mainframe.
2. Materials in electronic format will be considered for purchase on the basis of their merit in the context of the collection development policy for the particular subject. Since materials in electronic format are frequently more extensive than the print equivalent, selectors need to determine that some value will be added by the electronic version, as opposed to the traditional. Format selectors should recommend the format which best serves the instructional and research needs of the subject.
3. Consideration should be given to the equipment required to support the product. The selector should determine if hardware is already in place or if hardware would need to be purchased. Additionally, the selector should state if software can be purchased separately or if the product is sold only as a package, which includes hardware.
4. An effort should be made to assess the impact of the product on user access. Services and the amount of staff resources needed to support patron access should also be evaluated. If it is determined that the purchase would require the cooperation of the Savannah State University Computer/Technology Services Department, then this group will be consulted prior to a decision to purchase.

XVI. Competencies for Excellent Reference Librarians

1. Basic knowledge of information resources

- Possesses and continually develops broad general knowledge.
- Continually builds upon basic knowledge of information resources.
- Develops areas of specialization.
- Demonstrates awareness of library-system resources.

2. Skills in Conducting Reference Interviews

- Uses professional skills (welcoming behaviors, techniques to identify patron needs, and follow through) in every reference transaction.
- Assesses patrons' abilities and requirements and appropriately identifies materials, databases and web sites to match their needs.

- Demonstrates sensitivity to diverse populations with varying needs.
- 3. Professional Search Skills**
 - Capable of finding and evaluating the information resources best suited for answering specific questions in a variety of subject areas.
 - Understands the structure and organization of information in a variety of disciplines and formats.
 - Expertly searches catalogs, databases and Internet sources.
 - 4. Knowledge of Policies, Procedures, Ethics and Issues**
 - Demonstrates knowledge of library policies, procedures and service standards.
 - Maintains current awareness of professional issues impacting libraries.
 - Maintains confidentiality of patrons.
 - 5. Technology Skills**
 - Uses technology to contribute to value-added products, such as bibliographies, databases, subject guides, tutorials, and web pages.
 - Continually develops skills in using technological tools.
 - Finds ways to remove technological barriers and facilitates information access for patrons.
 - 6. Communication Skills**
 - Communicates openly, directly, clearly, and respectfully with customers and colleagues.
 - Demonstrates active listening skills with customers and colleagues.
 - Focuses on solutions, rather than problems.
 - Uses effective team process skills to develop and achieve organizational goals, and to work collaboratively with all levels of library staff.
 - 7. Teaching and Presentation Skills**
 - Increases awareness of the role of libraries and librarians in information literacy.
 - Uses a variety of presentation techniques to convey information to patrons with different learning styles.
 - Comfortably presents information in a clear and engaging manner, in dealing with customers one-on-one or in groups, in formal and informal settings.
 - 8. Customer Service**
 - Proactively seeks ways to enhance the library experience for users.
 - Uses the library's customer services First Contact Guidelines to provide quality service designed for all library staff.
 - Adds value to reference services.
 - Provides accurate, efficient, and prompt services to all patrons with a friendly and welcoming attitude.
 - 9. Commitment to Life-Long Learning**
 - Anticipates and manages change effectively.
 - Pursues learning opportunities, personally or through formal training.
 - Actively participates in the professional community.
 - Remains knowledgeable in current events and popular culture.
 - Is flexible, adapting to new situations, systems, and teaching/learning tools.

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