

## **EODLS Reference Policy**

Library users will be provided with accurate and timely reference assistance. All information requests will be answered promptly, accurately, efficiently and courteously by trained staff.

All requests from patrons should be answered, whether by providing information, instructing patrons in the use of library materials or referral to another agency. If a staff member is unable to satisfy the request, referral to other resources is expected.

Staff will adhere to the standards established in the System Personnel Policies including but not limited to the Interlibrary Loan Procedures, Circulation Policy, Conduct Policy and the ALA Code of Ethics. The purpose of these guidelines is to assure consistent delivery of quality information and referral services to all library users.

### **Confidentiality of Reference Queries**

All reference transactions between a library patron whether adult or child, will be considered confidential and will be discussed only in a professional context.

All staff is expected to honor the confidentiality of reference questions. Failure to do so is grounds for dismissal.

### **Reference Interview**

The reference interview is used to help define user needs and to answer user questions. Staff will **begin** reference transactions with verification of user needs. The structured discussion that follows should clarify questions to be answered and the best way to provide the user with information requested. Staff will identify the resources used or recommended to the user. Staff will also make referrals to other Eastern Oklahoma District Library System branches or outside agencies as needed. The reference transaction will conclude with verification that the information need has been met.

Research assistance involves the in-depth coverage of a topic. The level of research assistance provided varies according to the availability of staff, the staff and user's knowledge of the subject, the volume of other user requests, the depth of the collection, the complexity of the question and the time frame in which the information is needed.

Lengthy research for individual users which requires extensive staff time to collect data from multiple sources, including bibliographic searches, electronic searches, copying of materials and collating items, is not normally provided as part of the Eastern Oklahoma District Library System research assistance.

In providing reference service, staff will consider the system's entire collection and staff as resources. Information and materials at all locations can be shared via fax, photo duplication, lending for circulation to users or in-house usage, and telephone or e-mail service. Questions beyond the expertise of a staff member, or beyond the resources of that library unit, will be referred to a colleague, the unit manager or another unit within the library system. Telephone reference should take no more than 5-10 minutes.

If it is not possible to find the information within the sources available through the Eastern Oklahoma District Library System, other libraries, agencies and community resources will be consulted.

Instruction in the use of bibliographic and reference tools, whether print or electronic may be provided. This instruction may be provided to individuals or groups. In the normal course of reference assistance, users are not required to learn how to use source materials and technologies. However, in some cases, staff will need to instruct users on how to use the tools and technologies to meet the user's information needs.

Staff will offer group orientations and instruction in the use of the library catalog, electronic products, and other resources. Staff may conduct tours appropriate to the age and interests of a group. The size and number of group tours conducted are dependent on the resources of the location and the availability of staff. Groups with scheduled appointments receive first priority of service.

### **Homework Help**

Reference questions regarding school assignments shall be treated as any other request for information or assistance. Interpretation of a teacher's instructions and completion of assignments is the responsibility of the student.

### **E-Government Service**

E-Government reference represents the delivery of services traditionally provided by the Federal Government, the state of Oklahoma and local government via electronic means. Library staff will assist patrons in searching for E-government resources by determining what type of form or service is needed to access local, state, federal or commercial site and where information can be found or if it exists. Staff will determine the information and computer competency level of the patron and encourage users to access services and proceed without help. Staff will not submit forms for patrons. Staff may provide limited assistance in completing applications and forms and will refer users to other locations that can provide additional help. Staff will inform users that computers are public and that they need to exit correctly to protect any private information they have entered and close the browser and all programs before logging off the computer.

## **TYPES OF REFERENCE SERVICE**

**Library staff will attempt to answer all questions. However, some limits have been established for types of questions and services beyond the scope and expertise of the public library.**

### **A. Appraisal of Books and Works of Art**

Staff will not provide appraisals of art works, antiques, rare books, coins, stamps, currency and other collectibles. While library staff may offer listings of appraisers or vendors, personal recommendations will not be made.

### **B. Directory Information**

Staff may provide addresses and telephone numbers to the public, where the name of the individual, company or organization is known. This type of information is available from telephone books, print directories, electronic products, and the Internet. When the user seeks "reverse information" (where the user has a phone number or address, but not the name) or "nearby" information (where the user has an address and wants to know who lives next door),

staff does not provide the answer over the telephone. If the appropriate directory is in the collection, users will be advised to visit the library. If the library does not have the directory desired, staff may refer the user to an alternate source.

### **C. Computer Questions**

Staff will provide users with basic orientation to computer hardware and electronic products available on the Library's computers. Library staff is available to assist users with basic machinery problems and answer simple questions regarding the electronic products. Depending on schedules assistance may be available to work one-on-one with library-supplied technology. In general, library staff cannot provide individual in-depth computer training, technical assistance or solve compatibility problems. Staff will refrain from handling equipment belonging to patrons. When further information is needed staff will refer users to pertinent manuals, other library resources, and the computer classes offered through the library. Staff may provide assistance in locating reviews, instructions, or other information about computer software or hardware. Library staff is limited in their ability to assist users in solving problems with their own personal computers.

### **D. Genealogical Questions**

General assistance with the resources of the genealogy collection is provided; however, the Library does not trace complete family histories or conduct in-depth research for users. The Muskogee Grant Foreman department may conduct in-depth research for a cost. An indication of whether or not requested genealogy information appears in an index or in the Library collection may be given over the telephone, by mail, fax, and by other electronic means. Genealogical volunteers will not have access to confidential patron records.

### **E. Medical, Legal and Tax Questions**

Staff may respond to medical, legal or tax questions by reading directly from the cited source or inviting the user to use the Library's resources in person. Staff must not offer advice, interpretation, recommendation, opinion or personal experience, which is the domain of trained legal, medical, or financial professionals.

Questions involving intellectual property (law that involves patents, trademarks, and copyrights) may be addressed by offering the user assistance with the tools needed for a preliminary intellectual property search. Staff cannot perform the search for the user or advise the user regarding intellectual property matters.

Staff may suggest that the user contact an attorney or medical practitioner, an appropriate government agency or nonprofit organization, or other libraries.

### **F. Mathematics Questions**

Staff helps users in locating mathematics or scientific formulas, but they do not attempt to solve problems or equations.

### **G. Tutoring Assistance**

Staff does not provide private tutoring. Referrals to appropriate literacy providers or community agencies will be offered. Tutors may arrange to meet with students in library space, as it is available.

## **H. Editing**

Staff does not critique or edit user manuscripts or resumes for job seekers. Referrals will be made as appropriate.

## **I. Translations**

Staff responds to users' requests for translations of words and phrases by using appropriate sources. Staff translations of text material that would require considerable time or that are beyond the level of staff expertise will be handled via appropriate referral.

## **J. Test Proctoring**

The System will offer proctoring services based on the availability of personnel, facilities and technology. Conditions for test proctoring must be within the library's service limitations. The student must make an appointment with the designated proctor. Although the library does not charge a fee for this service a donation will be happily accepted. Library Staff are not employed by organizations requiring tests and will have limited liability on the rules set forth by these institutions.

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## **Eastern Oklahoma District Library System**

### **Reference Service Limits and Disclaimer:**

EODLS staff members are not permitted to give legal, financial or medical advice and are not case workers. Staff cannot advise patrons as to the identification of forms or action needed to obtain government services. Library staff can assist patrons in finding E-Government materials that pertain to a specific subject in order to enable patrons to make informed decisions. Library staff cannot submit forms for patrons.

The library is not responsible for the content found on other government agencies' websites, for any failure in transmission of online applications or forms to other government agencies or for accurate submission of forms or information. EODLS takes measures to secure our network, but cannot guarantee against all security intrusions. The System cannot guarantee that other government agencies receive forms or information submitted from library computers or act on them appropriately. No agreement or contract is created between the patron and the library staff or the library system.

Patrons are advised to keep documents and confidential information secure and private. Patrons should be aware and careful when providing personal information while using library computers or exchanging verbal information.