



## Topics

Types of reference service

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Samples



People use libraries in a number of different ways. At various times, the reason for using the library could be related to business, work, school, recreation, hobby or personal finance/investment-related or for consumer or health information or other personal projects.

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### TYPES OF REFERENCE SERVICE

Reference service is the process that brings together library users and the information they need. Reference service can involve:

- answering informational questions
- readers' advisory
- instruction
- referral
- compiling bibliographies and lists

Library staff help patrons to answer informational questions; for example, "What is the capital of Brazil?". The library staff member searches for enough information or for the right material to fulfill the questioner's needs.

Library staff also help people to select reading material whether it be a good murder mystery, a good dog story for a child or a book that is "just like the one that the reader just finished". This type of service is described in a *Sourcebook* called ***Readers' advisory service***.

Reference service has an instructional aspect when the library patron wants to learn how to use the library in order to be able to locate information independently. In these situations, the staff can instruct the patron on the use of reference tools such as an almanac or index, or how to access other information.

When the resources in a small library cannot answer a question, people can be referred to outside resources, such as community-based organizations, government offices and other libraries, where the answers can be found.

Compiling bibliographies is another form of reference service. A bibliography is a list of materials on a given subject, or the works of an author. It can include books, magazine articles, pamphlets, and even videos, which are either in the library or available through interlibrary loan. Bibliographies can be compiled for individuals as part of the reference service offered by the library. In many libraries, general bibliographies are compiled on popular or high-demand topics such as lists for school science fair projects or a list of genealogical materials.



Before the actual process of reference service is examined, there are two crucial issues which must be considered -- ethics and policy.

## **Ethics**

Library staff should always be courteous and polite to their patrons. Factors such as age, dress, or race should not influence the service provided. Every patron deserves to be assisted promptly with seriousness and respect. At the same time, the staff must keep in mind that their work does involve some ethical decisions. The Canadian Library Association produced a code of ethics which applies to everyone working in a library. It reads:

***CANADIAN LIBRARY ASSOCIATION  
CODE OF ETHICS***

Members of the Canadian Library Association have the individual and collective responsibility to:

1. Support and implement the principles and practices embodied in the current Canadian Library Association Statement on Intellectual Freedom;
2. Make every effort to promote and maintain the highest possible range and standards of library service to all segments of Canadian Society;
3. Facilitate access to any or all sources of information which may be of assistance to library users; and
4. Protect the privacy and dignity of the library users and staff.

Passed by the Annual General Meeting of the Canadian Library Association (76)



With respect to ethics in reference service, there are four critical areas. These are:

- accuracy of information

Library staff have a responsibility to ensure that information is up-to-date. Selection and weeding policies and practices contribute significantly to the accuracy of information in the collection. Staff commitment and willingness to confirm accuracy where there may be doubt is another critical factor.

- censorship

Freedom of access to information should be a commitment of all library staff. A balance in the collection, rather than bias, should be provided. For instance, whether the person responsible for selection is personally pro- or anti-abortion, the library collection should represent **both** sides of that argument. Similarly, any questions asked should be answered non-judgementally and courteously, regardless of personal view.

- privacy

In Section 28 of the *Public Libraries Act, R.S.O. 1990, chapter P.44* (formerly referred to as the *Public Libraries Act, 1984*), the privacy of the individual user is protected. If an individual or institution inquires, for whatever reason, about an individual user, including what that person has read in the past, the library personnel has a duty to protect the user's right to privacy. Even a request from a police officer requires a search warrant issued by a court.

- interpretation

Interpretation is a particular concern in the area of medical and legal information. For example, someone who asks whether the definition of a medical disease might apply to their Uncle Cornelius should immediately be referred to a doctor for that information. Similarly, someone who wants to know if he/she should sue a contractor because of some perceived omission in the building code, should be referred to a lawyer. The medical treatment of animals should also be referred to a veterinarian.

Libraries are in the business of supplying information, not interpreting it.



### Policy

Written policies for reference service are needed, no matter how small the library. Policy development is a function of the library board, but a great deal of input from the staff is necessary to create a reference policy which is useful.

Written policies provide useful guidelines for both library personnel and library users. It is helpful to be able to say, when a contentious issue arises, “The library has a policy on that.” It shows the community that the decision in the particular instance is not arbitrary, but that the staff has done some careful, advance thinking and planning about just such situations, and has made well-reasoned decisions.

Information service policies are actually one component of the overall policy for your library. The policy developed for dealing with reference services must be consistent with the library’s overall mission statement, goals, and objectives. A reference service policy does not have to be long, but should cover:

- which staff members are responsible for providing reference service
- how much assistance is provided
- how telephone and fax requests are handled
- which categories of questions staff will not attempt to answer
- how the reference collection is developed and maintained and by whom
- how unanswered questions are handled
- when patrons are referred to other agencies
- what statistics are kept
- whether long distance calls can be made to answer certain questions
- what material can circulate -- and under what circumstances

In many situations, the basic policy issue is -- “How much should library staff do for the client?”. This may be an issue for smaller libraries, where staff are few and may not be well-trained in reference service. In this case, the staff function is often limited to directing patrons to appropriate sources.



All library policies must be re-evaluated regularly -- i.e. annually -- to ensure that they still reflect reasonable practices, but it should be recognized that any alteration implies a change in the philosophy of the library and should not be taken lightly. (Sample 1: Reference service policy)

The policies can be written together with procedures for reference service. The result should be a manual which is a “how-to-do-it” book for the library staff that covers most basic and immediate problems likely to arise. Such a manual is needed for staff training and for everyday referral. It is also useful when patrons contest specific practices. (Sample 2: Reference service procedures manual - sample page)

### Record-keeping

For reporting and planning purposes, it is useful to record certain kinds of information about the reference service. These fall into the categories of statistical records and records of questions asked.

### Statistical records

Reference statistics are among the other data required by provincial government in return for the library’s annual provincial grant. These statistics are collected through the *Annual Survey of Public Libraries*. Information compiled from that survey is published annually in the *Ontario Public Library Statistics*. In the *Annual Survey of Public Libraries*, a reference request is defined as:

“any request for information or aid which requires the use of one or more sources to determine the answers or which utilizes the professional judgement of the librarian; it includes ready reference, literature searches, and reading aids but *does not* include questions, the answers to which involve giving directions.”

For example, according to this definition, a sample reference request might be “Where can I find *Consumer reports*?” The questions, “Where is the fiction section?”, or “Where are the magazines?”, should not be counted as reference requests.



It is useful to develop a form for the collection of statistics. Often statistics are recorded on a separate page for each day, using a simple stick tally within pre-determined categories. Any number of categories may be used depending on the purpose for keeping the statistics, including the type of user asking the question (e.g., child, young adult, adult); the mode of contact (e.g., telephone, in person, letter); or the subject area using Dewey class (100, 200, 300 etc.); whether the question was answered. (Sample 3: Statistics form)

More accurate information can be obtained by doing a **random sampling** rather than gathering statistics every day. A good time to collect statistics is during the survey week selected for the *Annual Survey of Public Libraries*.

### **Record of questions asked**

It is very helpful to keep a record of the subject of **frequently asked or difficult to answer questions**. The policy (Sample 1: Reference service policy) includes a section on keeping track of questions which the library was unable to answer.

A “where-to-look” file or binder can be maintained if it is anticipated that other patrons will need the same information. These folders could then be incorporated into the pamphlet file where the existing subject headings will provide easy access. No matter what format is used for the where-to-look file, the key is that if one has been compiled, remember to use it!

Keeping track of **unanswered questions** is a useful method of identifying gaps in the collection. If outside resources for particular subject areas must be used on a regular basis, this indicates a collection area which needs improvement.



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### REFERENCE PROCESS

Reference service should be clearly thought out with respect to the ethics of the service and a written policy for the service should be in place. But just how does the reference process work? What happens when the library patron asks a question of the library staff, either in person or over the telephone? How does one find out what people really want to know? How does one find the answer?

The reference process is the interaction between the library user, the library staff member and information sources; it brings together library users and the information they need. This process has two components -- the reference interview and the actual search for information.

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### REFERENCE INTERVIEW

The reference interview is the process by which staff determine exactly what question is being asked by the patron. Everyone has a different way of asking for information. One of the key elements in providing reference service is drawing out from the patron a precise expression of what he/she is looking for. It may be nothing more than the user asking a question and the library staff providing the appropriate source. It may also be quite a complex exchange.

Conducting an effective reference interview is more of an art than a science. As is the case in so many disciplines that involve human interactions, misunderstandings can occur.

### Points to consider

The library staff should be aware of some of the difficulties which may arise during the interviewing process. Points to consider during the reference interview include:

- understanding the patron's reason for wanting the information
- avoiding premature diagnosis
- knowing what questions to ask the patron
- understanding the importance of non-verbal communication



### Understanding the patron's reason for wanting the information

Patrons with a question often inadvertently sabotage their chances of getting relevant information. It is important that library staff recognize how this happens and learn ways to overcome it.

1. Patrons frequently ask their questions indirectly. Their tendency is to generalize, for example, asking for “information on cars” rather than a consumer report on a specific type of car. The temptation on the part of library staff is to accept and answer the general question. While this saves time and effort, it often results in a patron never finding the needed information.
2. Another tendency of patrons is to attempt to “package” their questions in what they assume to be library terms. A questioner may ask for information on “apiculture” rather than “bee-keeping” for this reason.
3. Embarrassment (particularly on health and/or legal issues) is another key factor in how a patron phrases a question. Library staff must be particularly discreet and tactful on these occasions.
4. Patrons may be uncertain about their questions. They may not actually know the terminology in the particular discipline to which their question pertains. This is especially true in the sciences.
5. Patrons may be uncertain about the library's role with respect to their needs. Many questioners apologize for disrupting library staff from other duties. Some feel that their question really doesn't merit “wasting your time”. Others are uncertain if the library has, and/or could get, the information.



### Avoiding premature diagnosis

Library staff must avoid premature diagnosis of a questioner's need. The library staff must provide opportunity, encouragement, and help for questioners to express their real need. The two interviews which follow illustrate the idea of avoiding a premature diagnosis of the questioner's need.

In the first interview the staff member assumes that he/she knows what the patron wants and does not elicit further information from the patron.

In the second interview, the staff member summarizes what he/she understands the patron needed. The patron then had the opportunity to confirm and/or add information. This technique ensures that the reference interview is successful.

#### Interview 1

- Patron: Do you have audio?  
Staff: Audio? Do you mean books on tape?  
Patron: **Audio**, you know the magazine.  
Staff: Let me check. Yes, we have it. It's right over there. Let me show you.

#### Interview 2

- Patron: Do you have audio?  
Staff: Audio?  
Patron: **Audio**, you know the magazine.  
Staff: Let me check. Yes, we have it. It's right over there.  
**What in particular are you looking for?**  
Patron: Oh, I don't know. I just want to browse through them to see if they have any evaluation of equipment.  
Staff: What kind of equipment are you looking for tests on?  
Patron: A CD player actually.  
Staff: Which make do you have in mind?  
Patron: I'm not sure, I was hoping to find a consumer report on a variety of players. I've been around to the dealers, but I'd like to see some objective evaluations before I buy.  
Staff: Let me see. You would like some critical evaluations of CD players in order to select the make you will buy. Is that right?  
Patron: Yes.  
Staff: Okay. We have **Consumer Reports**, which may have references to magazine articles on CD players. They are over here, I'll give you a hand.  
Patron: Great. Thank you.



### **Knowing what questions to ask the patron**

Open questioning is an important technique which library staff must learn to use. An open question usually begins with:

who    what    where    when    how

The question, “May I help you?” is often answered by “no”, whereas the statement “What else can I help you with?” encourages the questioner to explain something about what he/she is seeking. Open questions provide the patron with the opportunity to express the question in his/her own words.

Closed questions (to which one can only answer using the terms “yes” or “no”) preempt explanations and often force the questioner to respond in the terms that the staff member presents. This can lead to an endless list of queries as staff members desperately search for the right question.

### **Understanding the importance of non-verbal communication**

Another critical concern is the body language of the staff and patron. Every potential patron makes a decision whether to approach the library staff member with a question. This decision is often made with a glance at the reference desk and the staff member there.

What does the reference area look like? Does it have a clear sign inviting patrons to please ask for help? Is it inviting? Is the staff member approachable?

A desk represents a barrier. To encourage patrons to cross that barrier the staff must look up regularly, smile, and nod. If someone is hovering, the staff member should make the approach. Moving from behind the desk and towards the person removes that barrier.

The physical level of the speakers is also important for communication. A sense of equality and openness is established when both the staff and the patron are on the same level, be it standing or sitting. Sitting also establishes a sense of familiarity and confidentiality. If possible, the reference area should have extra chairs for patrons. This provides staff with props that they can use to help create the necessary atmosphere.



Non-verbal communication will tell the patron a great deal about whether the staff member seems interested in helping them. Smiling, making eye contact and greeting the patron are all positive, encouraging actions on the part of the library staff. As the reference interview progresses, the staff member should react encouragingly to the questioner with nods, smiles, and other facial expressions and show some animation in gestures. The staff member who constantly looks back towards the desk, or at his/her watch, or who fidgets, is showing a desire to get away.

### Content of the interview

Throughout the interview with the patron, the following information is needed:

1. The **subject** of the request must be determined. However, if the staff member does not know anything about the subject, it is difficult to continue the interview. The patron may be able to describe the subject more fully; if not, the staff member can:
  - Check the definition of an unfamiliar term in the dictionary.
  - Look up the subject in an encyclopaedia. This method may open up other areas to search and suggest alternate subjects. For example, if the question is about the “New Deal”, a look at the index of an encyclopaedia would reveal that the New Deal is related to the Depression era, a particular period of American history, and President F. D. Roosevelt, thus providing other avenues to explore to find information.
2. The **purpose** for which the information is required may be difficult to determine, but the staff member can often infer it from the rest of the interview. Purpose is closely related to level and amount of information required.
3. The **level of information** varies for each type of patron. A specialist might require technical information, a layperson might want a practical account, and a student will need something within his/her scope of understanding. For example, a junior high school student might be happier with a biography from the *McGraw-Hill Encyclopaedia of Biography* or a general encyclopaedia article, than with the more scholarly information found in the *Dictionary of Scientific Biography*.



4. The **amount of information** required is important to establish. If the patron just wants a brief description or explanation, or some fact, the staff member can turn immediately to a handbook, encyclopaedia or dictionary. If not, indexes and catalogues can be used to find more extensive information.
5. The terms, **current** and **retrospective** refer to whether the information must be up-to-date or historical. For example, information on a contemporary author would be found in entirely different areas than for one who lived in the eighteenth century.
6. The **format** of the information required is an important consideration. Does the patron want an article, maps, or pictures? Will he/she use microfilm? If CD-ROM (Compact disc - Read only memory) products are available, is the patron willing to search for information in this format?
7. The **availability** of library materials is a practical concern. Is the patron willing to wait for interlibrary loan or a reserve? Can he/she use reference books, or must the books circulate?

By obtaining the type of information listed on this and the previous page, the staff member is beginning to determine the **search strategy**, the method by which the information will be located.

It is also important to remember the interview continues throughout the search process as feedback is obtained from the patron. He/she confirms whether or not the needed information has been located. Dissatisfaction may be indicated through a statement, for example, "This isn't really what I had in mind" or other non-verbal messages. Disinterest or "giving up" also indicates that the search may be off-track.



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**SEARCH  
STRATEGY**

The search strategy is really the second phase of the reference process. It is the overall plan for supplying information to the patron. This plan follows from the information collected during the reference interview. Remember that throughout the actual search, the interview and the question negotiation will continue.

**1. Categorize the question**

The reason for categorizing the question is to be able to choose the correct information sources for the type of question. Questions may be categorized into three major types:

- **Directional questions**

Directional questions are the questions usually prefaced by “Where is...?”. The patron wants to know the whereabouts of the mysteries section, the encyclopaedia, etc. He/she does not want assistance, just the location.

It is important to be cautious with directional questions as they may not be what they seem. To help clarify the type of question, you may need to say to the patron something like “May I ask what you are looking for...?”. Patrons often ask general directional questions when they really have a specific question in mind. The book or section of the collection the patron thinks may have the answer may not, or the library staff may be able to locate the information more effectively. On the other hand, do not make a simple question unnecessarily difficult.

- **Ready reference questions**

This type of question is sometimes known as quick-reference or fact-finding enquiries. Ready reference questions are those which can usually be answered using one reference tool. Straightforward questions such as “What is the French word for ‘sweater’?” or “What is the capital of Sri Lanka?” are considered ready reference.

When answering this type of question, it is important to remember not to attempt to answer the question off the top of your head. If a quick answer is blurted out, and it turns out to be wrong, the situation could be very embarrassing. The facts should always be checked in an appropriate reference source.



- **Research questions**

Research questions are more complex and require the staff member to search more than one or two sources. These in-depth or research questions may require more time and more than one kind of information. At times, what looks like a ready reference question can become a research question.

Although a surprisingly large amount of information can be found in a small library, most small libraries usually do not own sufficient resources to answer in-depth research questions. Library staff should become familiar with the use of interlibrary loan, the resources of other branches or collections and agencies, and know how to refer questions to them.

## **2. Interpret the question**

This is the process of matching the type of information needed with a likely source. There are two parts to this process.

### **Part 1:**

Match the category of the question with a source or sources which contain the kind of information needed. Reference sources can be categorized by subject, reading level, currency, and format. More detail on reference sources is given later in this *Sourcebook*.

### **Part 2:**

Translate the question into the terminology used in the particular tool(s). This may require:

- translating into a subject heading such as 'herbicides' rather than 'weedkillers', or 'Great Britain--History' rather than 'History, Great Britain'
- broadening the search terms; e.g., 'dinosaurs' rather than 'apatosaurus'
- narrowing the search terms; e.g., 'cats' rather than 'animals'



If a subject area is unclear, it may be necessary to use a dictionary or encyclopaedia, especially if the patron cannot provide clear information. A list of subject headings (such as *Library of Congress Subject Headings*) is also useful to determine the correct heading(s) to look up. If a computer and CD-ROM equipment is available, subject headings can be verified by using the CD-ROM versions of the Northern Ontario Catalogue (NorOnCat) and Catalogues of the Public Libraries of Southern Ontario.

### 3. Search

The staff will need to work with the patron to locate appropriate information. The most effective staff are those who are very familiar with their collection, particularly the reference collection. Library staff members should also be aware of the material in the library's regular collection that may also be useful in answering questions. Deciding where to start looking for information, based on knowledge of the materials in the library, becomes important.

For ready reference questions, it may be a matter of simply supplying one piece of information from basic reference works such as a dictionary or almanac.

For questions with some complexity, take one step back and begin with a "where-to-find" reference tool. References to materials that will be useful can be located using the headings in the library's catalogue, or a subject heading determined in the second step of the search strategy.

Often a subject question is not as straightforward as it may seem when the search begins. For example, when looking for information on the Rosetta Stone (an early example of writing), reference tools which are in the subject area of archeology are very useful, but information about this artifact can also be found in books on the history of language. The key is not to limit the search too quickly.



#### 4. Satisfaction

Throughout the process feedback from the patron should be encouraged. It is best to confirm that the search is on the right track and, if necessary, be prepared to quickly adjust the strategy as a clearer picture of the need emerges.

Remember, as well, that patrons may be uncertain or uneasy about the whole process. As material is produced for them to check through, attention is drawn to the material and away from the patron. This may help the patron to relax and offer a clearer idea of what he/she wants.

It is not always possible to complete a search while the user waits, and the person may need to be contacted later with more information. The search is not complete until the patron indicates that he/she is satisfied. If this is not possible within the scope of the local collection, make use of other resources in the community or the interlibrary loan system.

The next part of the reference process involves the sources themselves. To be successful at finding information, it is important that library staff become thoroughly familiar with individual reference works as well as the reference collection as a whole -- and is an on-going process.

By knowing the materials on the reference shelves, the staff are able to select the item which will best answer the question. The library staff member who knows the reference collection well can extend the use of a small collection and can frequently offer a more effective service than a staff member who is not familiar with a collection even though it contains more volumes.

**Note:** Keep in mind that while the term “books” may be commonly used, the item may not necessarily be in a printed format. Many reference books are now available in a number of alternative formats such as microform, CD-ROM, or are accessed through a computer network, thus the term “on-line”.



## Selecting appropriate materials for use by the general public

There are a number of tools to use in selecting reference material for a library, and some are specifically aimed at the smaller public library. Books and magazines which can be used to help in the selection process are available from the Southern Ontario Library Service (SOLS) or Ontario Library Service-North (OLS-N) offices.

Magazines may also be used as selection tools. Consider purchasing the following magazines or sharing them among a group of nearby libraries:

*Booklist*  
*Quill & Quire*  
*Library Journal*

Consider the following factors in selecting and acquiring reference material:

- cost of material and the amount of money in the library acquisition budget
- ease of use
- the **subject area** or range of coverage of the particular item -- consider how the subject area could be used to answer questions and if there are other reference tool(s) in the collection which already fall into this subject area
- think about the **reading level** and level of sophistication of the item and whether it matches the usual detail needed by the library's patrons
- **currency** - as only a limited number of reference tools provide very current information, but this is often the latest available information without going to magazines or newspapers
- consider whether the best reference tool would be one which displays the information using a computer, such as a CD-ROM product, or whether the printed form would be the best **format** for this reference material
- **suitability** for your library

Once the material is received, be sure to have a good look at each item using the method described on the next few pages.



### Keeping the collection current

Reference tools are regularly revised and updated. Publishers use several methods to maintain currency in their reference works:

1. Encyclopaedias and dictionaries are revised continuously. A certain percentage of the material is revised with each printing. Publishers usually concentrate on revising rapidly changing areas.
2. Annuals and yearbooks are totally revised or compiled from events, statistics, and articles for that year. The publishers of encyclopaedias also issue yearbooks to maintain currency of the encyclopaedia.
3. Complete revision is the method used when a new edition is published.
4. The loose-leaf format allows the publisher to send single updated pages to their subscribers as necessary. News services and directories often are published in this manner.
5. Periodical indexes which are published monthly and usually cumulated annually provide very current reference tools.

The collection should be weeded regularly. It is wiser to have nothing than something that is incorrect or out of date. No answer is preferable to a wrong answer. Outdated reference tools should not be left in the reference collection where they may be mistakenly used to search for current information on a certain subject.



## How to examine a reference source

The first step in becoming familiar with a reference source is to read the introductory material including the title, author, publication date, place, foreword, preface, introduction, instructions for use, and table of contents. If the reference source is in an electronic format, you may need to review the accompanying printed material or examine the 'help' section contained within the item.

Keep in mind when examining the reference book that there are two basic objectives: finding the **scope** and the **arrangement** of the material.

### Scope/purpose

The scope covers what the source includes and what is excluded. Consider the following questions.

- What do the publisher and editor wish to achieve?
- What time frame and subjects are covered?
- For what audience is it intended?
- • What are the specific inclusions and exclusions?

### Arrangement

Examine the basic arrangement of the main part and the indexes. Consider these questions.

- How is it arranged? Is the sequence of material alphabetical, classified, geographical, or chronological? For example, dictionaries are alphabetical, libraries are arranged in a classified order, atlases are geographic in arrangement, most history books follow a chronological order.
- Is it multi-volumed?
- Where are the indexes and appendixes?



In examining the arrangement of a particular source, look at the body of the work and scan a few entries, noting the following:

- Are the entries arranged in broad or specific groups?

In a **specific entry** reference tool, information is broken into smaller articles and arranged alphabetically in the publication. This method allows direct access -- often without using the index. For example, information on the planets would be entered under the name of each planet separately.

In a **broad entry** reference tool, information is presented in longer, more inclusive articles. For instance, under the broad heading 'Solar System' there would be subheadings for 'Origin', 'Mars', etc. One advantage of broad entry arrangement is that it provides a better overview of a subject.

- What style of presentation is used? For example, is it essay-style as in most encyclopaedias, or is it a compilation of data (frequently used in almanacs)?
- What graphic materials (maps, diagrams or illustrations) are used and are there captions?
- Are readings and/or bibliographies included?
- Note the search approach and capabilities of electronic sources, i.e., keyword searching or combination/Boolean searching.

It is also helpful to scan the index for the following information:

- What kind(s) of index is used: alphabetical (e.g., the library catalogue), geographical (such as the Postal Code book), chronological, classified (Propedia volume of *Britannica*), or a combination of these?
- How does the index refer to the entry? Are volume number, section number symbol, page number, or section of the page cited?
- Are "see also" references included? (e.g., 'aging', see also 'senior citizens')



### **Types of reference materials**

Almost anything or anyone -- a pamphlet, a community resource file, a government document and even the municipal clerk -- can be considered a reference source. While the book collection may be considered the principal source, questions are often answered and services provided from many other resources including information files, community resource files and local history collections.

### **Local history**

The most useful collections of local history materials are concerned with local people, their relation to the history of the community and local architecture. These collections might include:

- the records of churches, schools, institutions and clubs of the area
- scrapbooks of community projects
- pictures of old buildings
- Tweedsmuir histories produced by the Women's Institutes
- cemetery records compiled by local genealogical societies
- microfilm copies of back issues of newspapers, immigration records, census records, etc.

### **Community resource file**

Community resource files are created by collecting information on groups and organizations active in the community including the contact person, meeting times and tasks. This type of file could also contain a list of experts in the community or volunteer lists. Community resources can be accessed either by collecting information and compiling it into a resource file, or referring patrons directly to the appropriate organizations for them to continue their search.

Community resource files should be kept up-to-date on a continuing basis. There will be changes of address, changes of phone numbers, new "contact" people to list, or agencies which have ceased to exist. The local newspaper can also provide updates to the file as it will tell of appointments to positions, of new groups that have formed and of new programmes which are underway.



### Information files

In many libraries, a special collection in a file cabinet or drawer has been developed. The most common names for this type of reference collection are vertical file, pamphlet file or information file. In this type of collection, folders are arranged by subject and may contain pamphlets, newspaper clippings, pictures, inter-city bus schedules or even files of frequently-asked questions and their answers among the other materials.

### Published reference sources

Reference works are usually divided into two categories:

- “Where-to-find” reference sources

The most commonly used reference materials of the “where-to-find” type are the library catalogue, indexes, and bibliographies. In very small libraries or branches, there probably are very few (if any) indexes or bibliographies or even library catalogues. Nevertheless, it is important to be aware of their existence.

The **library catalogue** is often forgotten when considering reference tools, but it is an important reference tool in the library. It is an index to the library collection, particularly to the non-fiction books. The CD-ROM database provided for the INFO (Information Network for Ontario) project also provides a catalogue of the material found in many public libraries in Ontario.

**Bibliographies** are basically lists of books, articles or other materials which tell where to look for information. Bibliographies are often included at the end of publications for people who want additional resources for information on a particular subject or works by a specific author. *Books in Print* and its Canadian equivalent, *Canadian Books in Print*, are also examples of this type of reference tool.

**Indexes** are listings of topics, names or places that tell where information can be located. Indexes are particularly important as places to locate information in magazines and newspapers, but there are also indexes which cover collections of poems, plays, fiction and reports. With the advent of the microcomputer, more indexes are available on-line or on CD-ROM.



- **Self-contained reference works**

Self-contained works generally are those which contain the actual information as well as the means to locate it. For instance, encyclopaedias contain information on subjects as well as an index with which to locate the information. Other self-contained reference works are dictionaries, biographic sources, directories, almanacs, handbooks, manuals, atlases and yearbooks.

In addition to the reference collection, the library's circulating collection has many examples of self-contained works that are useful in information service.

### **A basic reference collection for the small public library in Ontario**

The list of reference materials which appears on this page and the next, was compiled for a workshop on reference service in a small public library. It includes items which should be in the reference collection of any small public library or branch in Ontario.

1. A multi-volume encyclopaedia published in the last five years.

*World Book Encyclopedia* is a good choice as it can be used by most grade levels and also by adults. Many encyclopaedias are available in both print and CD-ROM format.

2. A Canadian encyclopaedia

The latest editions of both *Canadian Encyclopedia* and the *Junior Canadian Encyclopedia* are needed.

3. A dictionary

Consider purchasing either *Funk & Wagnalls Canadian College Dictionary* or *Houghton Mifflin Canadian Dictionary of the English Language*. A French-English, English-French dictionary such as *Robert-Collins* or *Harrap's Shorter* would be a good addition.



4. An almanac published in the last two years

Popular general almanacs of American origin are the *World Almanac and Book of Facts* and *Information Please Almanac*. *Whitaker's Almanac* is also a good choice for a general almanac of British origin.

5. A Canadian almanac published in the last two years

There are three popular Canadian almanacs: *Canadian Almanac and Directory*; *Corpus Almanac and Canadian Sourcebook* and *Canadian Global Almanac*.

6. Ontario government directories: *KWIC Index to Services* is a keyword reference to Ontario government programmes and services and the *Telephone Directory* lists MPPs and Ministries as well as providing telephone numbers for personnel in each provincial ministry.

7. A general world atlas published in the last 3 years.

An excellent general world atlas is the *National Geographic Atlas of the World*. *Goode's Atlas*, geared more to students, is also useful.

8. Telephone and postal code directories

In addition to the local telephone directory, it is useful to have the directory for nearby larger town(s) or city visited frequently by residents of your town.

9. A thesaurus

A good choice for a thesaurus is *Roget's Thesaurus*

10. A book of quotations

A popular choice in libraries is *Bartlett's Familiar Quotations*

There is a list of basic reference material in French on the reverse side of this *Sourcebook*.



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**WORKING WITH  
CHILDREN**

Children need a wide variety of information, but often there is a limited choice of materials appropriate for their age group. Knowledgeable staff will be able to sort out the child's question and match it to the appropriate source of information.

**The reference process**

When a child asks for information, very often he/she is asking for information for the first time. The library staff must take extra time to reassure a child that his/her request is valid and that the staff can help to find the information. Children are quick to realize a lack of respect for their needs and are slow to forget an unfortunate experience at the library. The child who thinks of the library staff as being helpful and considerate is taking the first step to becoming a lifelong believer in libraries and their usefulness.

Children need information, but also may need more assistance in learning how to use reference sources than adults. People working with children should do more than look for building specifications for Iroquois longhouses, a diagram of the inside of a turtle or the exact wording of the Charter of Rights. They can help children to begin to use reference sources independently.

Library instruction for children, whether formal or informal, will vary depending on the level of education and maturity. For example, library instruction for first graders might focus on care of materials and awareness of fiction and non-fiction. Orientation to the library, introduction to specific library tools and explaining the research process might start at the third grade.

As with adults, library staff should conduct reference interviews in order to understand what the child wants and needs and to help the child clarify what he/she wants.

Be sure to use open-ended questions as discussed earlier on page 11. This type of question may encourage a child to ask for additional help or make him/her feel comfortable about coming back for help. Frequently children refuse an offer of assistance, particularly if closed questions are used.

When helping children, it may be helpful to try thinking of these questions which were suggested in *Principles of children's services in public libraries* by Mae Benne.



(Chicago: American Library Association, 1991, page 80)

What is the subject of the request?

Why does the child want the information?

What is the age, grade, or reading ability of the child?

Explore ramifications of the request by suggesting available library resources.

What will the child accept?

Avoid answering questions by pointing or telling children to check the library catalogue or look on the shelf. Going to the shelves with the child and helping him/her select appropriate materials by pointing out features of different materials on a topic helps to ensure that the question is being answered. At the same time, the child will pick up certain skills and perhaps be able to find materials on his/her own at another time.

### **Types of questions**

Children's questions may fall into one of several types. Some children ask questions because of personal interest, while others want to know more about a specific subject. During the school year, many questions are school-related.

Helping with school assignments can be a problem. Is it the library's policy to support school curriculum? How far will the staff go to help students find information for school assignments? The collection development policy of some public libraries states that textbooks are not purchased and neither are duplicates to provide all the students with copies of curriculum material.

Some libraries are reluctant to help students with homework questions. The library staff may not have time to help students clarify assignments, decide what to do a report on, or choose the perfect book to read, especially when it seems as if the entire school population has descended on the library at once.



Another problem with school assignments is that children come to the library after all of the material on a particular topic has been signed out. The relationship between the public library and the schools seems to be an on-going concern. The collection development policy should state the relationship between the public library collection and school curriculum. In the same way, teachers and public library staff can work together to help students with research projects. For example, if the public library staff are made aware of a particular project in advance, materials on this topic can be set aside.

In all types of questions, often children are unsure of what they need, uninterested in the topic, or unclear about how to approach it. With some help from the library staff, these problems can be addressed. More information on working with children is found in the *Sourcebook* called *Children's services*.

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### RESOURCES

This is a selective list of resources on the topic of reference and information service. Most of these titles are available for loan from the Ontario Library Service.

*Does this completely answer your questions?* Chicago: ALA Video/Library Video Network, 1992 [video]

Grogan, Denis. *Practical reference work*. 2nd ed. London: Library Association Publishing, 1991.

Jennerich, Elaine Zarembo and Edward J. Jennerich. *The reference interview as a creative art*. Littleton, Colorado: Libraries Unlimited, 1987.

Katz, Bill and Ruth A. Fraley, ed. *Reference services for children and young adults*. New York: Haworth Press, 1983.

McDaniel, Julie Ann and Judith K. Ohles. *Training paraprofessionals for reference service: a how-to-do-it manual for librarians*. New York: Neal-Schuman, 1993.

*Reference is more than an answer*. Milwaukee: Library Council of Metropolitan Milwaukee, 1991 [video].

*The reference librarian*, no. 16, 1986. Katz, Bill and Ruth A. Fraley, ed. "Reference services today: from interview to burnout". [whole issue of the periodical]



## Samples

1. Reference service policy
2. Reference service procedures
3. Statistics form