

SAMPLE 1

REFERENCE SERVICE POLICY

Trillium Public Library Board

Reference policy

March 1994

This sample policy has been included in this *Sourcebook* section to assist you in writing a reference policy that suits the unique needs of your community. This is just a sample and each public library should develop its own policy.

TRILLIUM PUBLIC LIBRARY BOARD
REFERENCE SERVICE POLICY MANUAL

CONTENTS

Policy number

REF-1 Responsibility for reference service

REF-2 Type of service offered

REF-3 Excluded questions

REF-4 Telephone and fax requests

REF-5 Development of the reference collection

REF-6 Unanswered questions

REF-7 Reference statistics

REF-8 Circulation of reference material

RESPONSIBILITY FOR REFERENCE SERVICE

All public service staff of the Trillium Public Library have received training in offering subject assistance to library patrons. All staff may attempt to answer questions and requests for information from any library patron, regardless of age.

Date: _____

Chairperson: _____

Policy #REF-1
Board

Trillium Public Library

TYPE OF SERVICE OFFERED

Library staff will attempt to answer questions as fully as possible, but must keep in mind the needs of all patrons using the library. If a question proves to be very time-consuming (requiring more than 15 minutes to answer), the library patron may have to be called back later with the answer. A possible time-frame for answering the question should be provided to the patron.

The Trillium Public Library welcomes all questions from all patrons and, except for the circumstances noted in REF-3, will attempt to answer any question, and will do so without passing judgement on the nature of the question.

Date: _____

Chairperson: _____

Policy #REF-2
Board

Trillium Public Library

EXCLUDED QUESTIONS

School-related questions will be answered in the same manner as all reference questions.

Only simple answers can be provided for prize contest questions.

In the course of reference duty, a staff member may be asked to provide information from medical, legal, census or tax sources. Library staff will do so readily, but must not offer any interpretation of the information provided.

Date: _____

Chairperson: _____

Policy #REF-3
Board

Trillium Public Library

TELEPHONE AND FAX REQUESTS

Requests received by telephone, fax or in writing are treated as all other requests, but if the library is busy, priority will be given to the needs of patrons who have come into the library. Telephone questions will then be answered when time permits. The patron will need to be called back on the principle of first come-first served, giving a realistic expectation of how long it might take to address the question.

Date: _____

Chairperson: _____

Policy #REF-4
Board

Trillium Public Library

DEVELOPMENT OF THE REFERENCE COLLECTION

The Chief Executive Officer (CEO) is responsible for developing and maintaining the reference collection appropriate to the needs of the community. He/she may delegate tasks to other staff members, as appropriate.

Questions which the library staff was unable to answer will be noted. The CEO will peruse these questions from time to time, to assist in selecting materials for the library.

Date: _____

Chairperson: _____

Policy #REF-5
Board

Trillium Public Library

UNANSWERED QUESTIONS

Questions for which no answer or material has been found in the Trillium Public Library collection, will be referred to the appropriate agency by the library staff (if such an agency is known), or will become an interlibrary loan request.

If time permits, staff may contact the agency for the patron. This includes making long distance calls on a patron's behalf. If time does not allow this, the name of the organization, as well as information allowing the patrons to directly contact the agency will be supplied if possible.

Date: _____

Chairperson: _____

Policy #REF-6
Board

Trillium Public Library

REFERENCE STATISTICS

Accurate statistics regarding service to patrons should be recorded using the Reference Statistics Form provided.

Date: _____

Chairperson: _____

Policy #REF-7

Trillium Public Library

Board

CIRCULATION OF REFERENCE MATERIAL

Reference questions may be answered using the entire collection of the library. However, some material will be designated for use in the library only. Such material normally does not circulate. In exceptional circumstances, and at the discretion of the senior staff member on duty, a special one- or two-day loan may be granted.

Date: _____

Chairperson: _____

Policy #REF-8
Board

Trillium Public Library

SAMPLE 2

REFERENCE SERVICE PROCEDURES MANUAL

The Trillium Public Library Reference Policy contains eight policies with regard to reference service. With these policies in place, a procedures manual can be developed. In the example, Policy #REF-8, Circulation of reference material has been developed as a procedure.

In the procedures manual, the actual procedure for the circulation of reference material is described.

With the approval of the senior staff member on duty, reference material may be signed out from the Library for time periods during which the library is closed. The staff member should determine that a circulation copy is not available and the patron's borrowing record is clear.

The loan period should be as brief as possible -- overnight to two days. Exceptions to this policy may be made for the following materials which may be signed out more liberally, but for no more than one week:

- Earlier editions of reference materials
- Specialized collections

Examples of materials that may never be signed out from the library include:

- Ready reference material (i.e. almanacs)
- Book or periodical indexes
- Expensive materials
- Materials from multi-volume sets (i.e. encyclopedias)

In these cases, it may be possible to offer to photocopy sections of the materials needed by the patrons.

No more than two reference items per patron may be signed out at the same time.

The fine for an overdue reference item is \$____ per day, up to the cost of the item plus the fee for processing the item's replacement.

Because of an unlimited variety and increasing number of circumstances which may affect requests for loans, each loan request should be treated as a new situation.

SAMPLE 3

STATISTICS FORM

Form 1

Reference statistics

Month/dates: _____

Day	Directional questions	Ready reference questions	Research questions
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Total			
Grand total: _____			

SAMPLE 3**STATISTICS FORM (CONTINUED)****Form 2****Reference statistics**

Week of: _____

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
Telephone							
Directional (library hours, regulations, etc.)							
Reference (ready reference and research questions)							
In library							
Directional (library hours, regulations, etc.)							
Reference (ready reference and research questions)							
Referrals							
Questions not answered (record the topic on the back of this sheet)							