USC Upstate Library Reference Desk Policy

Please note that the main headings of this policy were adapted from the ‘Guidelines for Behavioral Performance of Reference and Information Service Providers”. The guidelines were approved by the Reference and User Services Association (RUSA) Board of Directors of the American Library Association (ALA) in June 2004 and were last viewed online on May 14, 2010 at http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/guidelinesbehavioral.cfm.

“Reference transactions are information consultations in which library staff [library faculty] recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs.” This definition/description was adapted from the January 2008 RUSA Reference Guidelines and was last viewed online on May 14, 2010 at http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/definitionsreference.cfm.

1.0 Administration

In order for the reference desk to function collegiately in a professional manner the following expectations are essential for librarians:

1.1 Arrives for the reference shift on time;

1.2 If lateness is unavoidable, notifies the reference librarian on duty or the reference coordinator;

1.3 Negotiates with colleagues to make up any hours missed;

1.4 Remains on duty until the replacement arrives. If s/he must leave, then notifies the reference coordinator or finds someone else to take over;

1.5 Willingly assists at the reference desk as requested;

1.6 Willingly shares expertise and assists with particularly difficult questions;

1.7 Knows the scope and use of important sources available in major subject areas from the USC Upstate Library. Educates him or herself with unfamiliar sources;

1.8 Knows how to locate sources and explains their usefulness;

1.9 Is familiar with USC Upstate library policies and services;

1.10 Is familiar with USC Upstate campus services and policies;

1.11 Is familiar with content and resources taught in library instruction sessions;
1.12 Shows respect for colleagues by clearing the reference desk of personal work at the end of her/his shift;

1.13 Shows respect for colleagues by never removing desk supplies intended for use by all.

2.0 Approachability

In order to have a successful reference transaction, patrons must be able to identify that a reference librarian is available to provide assistance and also must feel comfortable in going to that person for help. For distance learning sites (such as the University Center of Greenville, etc.), this also means placing contact information for email, telephone, and other services, in prominent locations to make them obvious and welcoming to patrons. Approachability behaviors, such as the initial verbal and non-verbal responses of the librarian, will set the tone for the entire communication process and will influence the depth and level of interaction between the librarian and the patrons. At this stage in the process, the behaviors exhibited by the reference member should serve to welcome the patrons and to place them at ease. The librarian's role in the communications process is to make the patrons feel comfortable in a situation that may be perceived as intimidating, risky, confusing, and overwhelming. Expectations include:

2.1 Establishes a “reference presence” wherever patrons look for it. This includes having reference services in a highly visible location and using proper signage (both in the library and on the library’s web site) to indicate the location, hours, and availability of in-person and remote help or assistance;

2.2 Wears name tag during reference desk duty;

2.3 While it is recognized that each librarian has his/her own personal style, the reference librarian treats all patrons with equal respect, whether students, faculty, or other members of the community;

2.4 Looks up frequently;

2.5 Establishes eye contact with persons passing or approaching the desk;

2.6 Pleasantly greets patrons as they approach the desk;

2.7 Remains at the reference desk unless stepping away to assist a patron. Returns attention to the desk every few minutes;

2.8 Does not make outgoing telephone calls unless responding to a telephone reference question. Triages patrons in the library first and telephone patrons second;

2.9 Remains accessible to patrons and colleagues during on-call reference desk shift;
2.10 Acknowledges user online questions (email, chat, etc.) in a timely manner.

3.0 Interest

A successful librarian must demonstrate a high degree of interest in the reference transaction. While not every query will contain stimulating intellectual challenges, the librarian should be interested in each patron's informational needs and should be committed to providing the most effective assistance. Librarians who demonstrate a high level of interest in the inquiries of their patrons will generate a higher level of satisfaction among users.

3.1 When patron approaches, acknowledges patron as first priority. Demonstrates that assistance to patrons takes precedence over any other task while on reference desk duty;

3.2 Gives full attention to the patron. Acknowledges others who approach or are waiting. If other patrons are waiting, advises them that s/he will be with them as soon as possible. Spends no more than 3-5 minutes with a patron if others are waiting;

3.3 Recognizes that each patron deserves the same courtesy - even if the question has been asked many times before;

3.4 Gives full attention to the patron in online environments by sending written or prepared prompts, etc., to convey interest in the patron’s question;

3.5 Using the library may be intimidating to patrons. Exhibits patience even if the question involves the most basic knowledge;

3.6 Maintains objectivity and does not interject value judgments about subject matter or the nature of the question into the transaction;

3.7 Uses reference interviews or online interactions to gather as much information as possible without compromising user privacy.

4.0 Listening/Inquiring

The reference interview is the heart of the reference transaction and is crucial to the success of the process. The librarian must be effective in identifying the patron's information needs and must do so in a manner that keeps patrons at ease. Strong listening and questioning skills are necessary for a positive interaction.

4.1 Determines if patron requires distance education library support and services;
4.2 Listens attentively and patiently to patron’s needs. Allows the patrons to fully state their information needs in their own words before responding;

4.3 Rephrases the question or request and asks for confirmation to ensure that it is understood. Continues dialogue until both parties agree on the question;

4.4 Seeks to clarify confusing terminology and avoids jargon;

4.5 Verifies spelling and other possible factual errors in the original query;

4.6 Is attentive to patrons’ response. Some may need or want only minimal help. Allows the patron to experiment if that is what the patron wants to do;

4.7 Finds out what patrons have already tried and encourages patrons to contribute ideas;

4.8 Remains calm and unflappable when faced with difficult patrons or difficult questions;

4.9 Explains library policies pleasantly but firmly;

4.10 When providing online reference, provides prominent jargon-free web links wherever research assistance may be sought;

4.11 Uses open-ended questions to encourage patrons to expand on the request or present additional information. Examples would be ‘Please tell me more about your topic’, ‘What additional information can you give me’ or ‘How much information do you need’;

4.12 Uses closed and/or clarifying questions to refine the search query. Examples would be ‘What have you already found?’ , ‘What type of information do you need (books, articles, etc.)’ , ‘Do you need current or historical information?’ or ‘Is this for a class assignment?’.

5.0 Searching

The search process is the portion of the transaction in which behavior and accuracy intersect. Without an effective search, not only is the desired information unlikely to be found, but patrons may become discouraged as well. Yet many of the aspects of searching that lead to accurate results are dependent on the behavior of the librarian.

5.1 Considers all inquiries seriously and remains impartial throughout the reference interview and research process, focusing on the method of obtaining information rather than on a particular opinion;
5.2 Is concerned with the patron’s right to access and shares knowledge of access to information, allowing the patron to conclude the pursuit of information;

5.3 Understands the strengths of each subject specialist and consults in order to effectively respond to a patron’s request;

5.4 Consults with other USC Upstate library employees when lacking in knowledge in a specific area or unable to find the answer;

5.5 Consults with others on departmental policies;

5.6 Consults campus sources to assist patrons with their request(s);

5.7 Refers patrons to pertinent USC Upstate library handout, LibGuide or other resources;

5.8 Suggests a logical course of action appropriate to the question asked and the length of time available;

5.9 Does not do the work for the patron;

5.10 Makes sure patron understands the need to consult all necessary sources, but does not attempt to force the patron into using suggested sources;

5.11 Makes sure information provided is from the best available source;

5.12 If there are multiple sources with differing answers, advises patron of the discrepancies;

5.13 Advises patron of USC Upstate library holdings in various subject areas. Guides patrons to outside sources;

5.14 If the patron is not familiar with a source or tool, teaches the patron patiently but not condescendingly;

5.15 Makes sure that patron knows how to use a suggested tool or source;

5.16 Is knowledgeable about USC Upstate course assignments and the sources suggested for those assignments;

5.17 Links the goals or objectives of the user’s research to a specific course or assignment;

5.18 Selects search terms that are most relevant to the information desired;
5.19 Explains the search strategy and sequence to the patrons, as well as the sources to be used;

5.20 Works with the patrons to narrow or broaden the topic when too little or too much information is identified;

5.21 Recommends technology and services to help guide patrons through library resources including delivery of information to all regardless of physical location;

5.22 Directs patron to other area libraries when it is known that their sources are better suited to answer a specific question than the ones at USC Upstate.

6.0 Follow-up

The reference transaction does not end when the patron leaves the librarian. The librarian is responsible for determining if the patron is satisfied with the results of the search, and is also responsible for referring the patron to other sources, even when those sources are not available in the USC Upstate library.

6.1 Concludes when the patron seems comfortable, but indicates a willingness to continue if necessary;

6.2 At the conclusion of the initial reference interview, invites the patron to return to the desk for more help if necessary;

6.3 If time permits, checks back with patrons who have been helped with a simple phrase “Did this answer your question?” or “Did this satisfy your needs?”;

6.4 Offers to take the patron’s contact information and get back to the patron if a more thorough investigation by the librarian is needed to adequately answer the question;

6.5 Facilitates the process of referring patrons to outside libraries or information agencies through such activities as calling ahead, providing directions and instructions;

6.6 Suggests that the patron visit or call the USC Upstate Library when s/he needs future assistance;

6.7 Shares information with reference colleagues, but does not discuss the patron’s question in a derogatory manner.