

Santa Monica College Library

GUIDELINES FOR REFERENCE DESK SERVICE

PURPOSE OF THE GUIDELINES:

These guidelines will assist you, as a Santa Monica College librarian, in our mission to deliver high quality information service to all users in a consistent manner throughout the Library. Newly appointed staff should have these guidelines incorporated into their training. Experienced staff should refer to them occasionally as a refresher. While these guidelines provide direction, situations may arise which may lead you to depart from them. You are expected to use your best professional judgment in unusual situations. Whenever a librarian makes an exception of note, affected librarians and/or staff should be notified.

REFERENCE SERVICE PHILOSOPHY AND HIERARCHY OF SERVICES:

While information services are available to all, our primary users are the students and staff of Santa Monica College. We provide in-person and limited telephone service to library users.

1. Reference librarians are civil and polite to patrons.
2. First duty to in-person patrons as opposed to telephone or other requests. Telephone calls to the reference desk must be taken (see "Types of Requests: Telephone," p. 3).
3. First come, first served, except: quick reference before long research or trips to the stacks, etc., when several people are waiting. Tell waiting patrons politely what you plan to do.
4. We want to empower students to function efficiently on their own in the library, so we encourage them to learn by doing.

RESPONSIBILITY FOR INFORMATION SERVICE:

The Assistant Dean of Learning Resources is ultimately responsible for the quality of information services delivered in the Library. The librarian designated as head of reference may be consulted on policy or other matters. All reference librarians have been specifically educated to provide assistance to patrons. Therefore, all requests for information other than those relating to circulation services and directional information have to be referred to reference librarians on duty at the reference desks. All staff, including student assistants and volunteers, must follow this guideline.

WHO IS SERVED:

While information services are available to all patrons, the primary users of the Santa Monica College Library are the students, faculty, administrators, and staff of the College. Those requiring special attention should receive it as staff time and resources permit (see "Time Spent With a Patron," p. 3). Students are the primary users of Library services. Faculty and Staff are shown consideration when needing services of the Library, with the goal of empowering them to utilize the Library's services on their own. When administrators need Library services or materials, the Library will make every reasonable effort to accommodate their requests as expeditiously as possible.

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CONFIDENTIALITY OF LIBRARY RECORDS:

Patron records are not to be disclosed except to the patron in question upon presentation of proper identification. The fact that an individual was in or is in the library is also a confidential matter. See the section in these guidelines on "Requests to Page Patrons" for further definition.

THE MANNER IN WHICH WE SERVE PATRONS:

Attitude: Always demonstrate a good public service attitude when working at the information desk. Good public service qualities include approachability, sensitivity, discretion, and courtesy. Remember that the manner of information delivery is as important as the information delivered. In addition, be respectful and accommodating of patron needs or requests for privacy when information of a sensitive nature is requested (e. g. information on a disease that the patron may be suffering from).

Telephone Etiquette: The words, inflection, and tone with which the telephone is answered should indicate a willingness to assist the caller. When answering incoming calls on the "public lines," always identify your location; for example: "Library, Reference Desk. May I help you?" (See also "Types of Requests: Telephone" below for more information on telephone requests.)

Other Work Done While on the Reference Desk: Work performed at an information desk should not interfere with approachability. You should be continuously alert to patrons needing your assistance. Desk Time should never be spent perusing purely personal interests. Similarly, personal telephone calls should not be placed or received while at an information desk. Incoming personal calls should be brief or transferred to a more private phone if possible. Business calls, other than those related to a user's question, should be placed at other times.

Tasks done at the reference desk should be those that permit constant interruption and are library-related, such as brief perusals of professional journals, reviewing of the reference log, checking library orientation schedules, collection development, matters affecting other librarians (e.g., special assignments to incoming classes, etc.).

Instructing vs. Answering Requests: In keeping with our goals of empowering patrons, reference efforts should be directed to instructing patrons briefly on how to use sources and services and then allowing them to follow through on their own. Patrons may be referred to written instructions whenever possible, with librarians following up on their progress minutes later. If patrons continue to have difficulty, help as much as possible without neglecting other patrons.

Directing vs. Accompanying Patrons to the Shelf: You should accompany patrons to the circulating or reference shelves to locate materials when users are having difficulty locating materials. Use this as an opportunity to teach them how our books are arranged on the shelves. If item is not found on the shelf and time permits, check sorting shelves. After patron's second fruitless search in subsequent days, inform technical services via a "Missing Books" form.

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When a Colleague Gives Misinformation or Incomplete Information: Patrons should leave the Library with correct information. You should behave toward other staff members in a professional manner, trying not to embarrass a colleague. If a situation arises when you overhear a colleague giving incomplete information or misinformation to a patron, tactfully offer "newer" information. Some suggested phrases to use are: "I have some new information on that...", "I was just working on that and found ...," "In addition, have you considered..."

Consulting Colleagues: After your own good faith attempts, do not hesitate to use the knowledge and resources of other staff members when you have been unable to help a patron.

THE MEANS EMPLOYED TO SERVE USERS:

Reference Interview: Always practice sound reference interview techniques when negotiating patron requests. Such techniques involve asking pertinent questions to determine what the patron wants and in what form. This negotiation process saves time and energy for both the staff and the patron. Some phrases to use are:

"Can you tell me a little more about..."

"Please tell me exactly what you need to know about..."

"We may not have a whole book on that subject, but we do have sources that will provide you with some information. Will that be enough to satisfy your needs?"

Closure: You are encouraged to follow-up with the patron whenever possible. For example, "Does this answer your question?" "Do you need further information?" "Did you find what you needed?"

Passing Information on to Other Librarians: The daily log at the circulation desk and the reference log should be used to write notes explaining or notifying other librarians of information of interest to them or which can affect service, such as problems with computers, new procedures, etc. The reference desk calendar should be used to notify librarians of desk assignment changes, meetings, orientations, etc. Librarians should check the log and the calendar on a regular basis. Messages left for librarians (telephone, students' notes, etc.) should be left at the librarians' desks or mailboxes. Check the in/out board for information on absences.

REFERRALS:

When to Refer: If a patron's request cannot be answered using resources in the SMC Library, the patron should first be referred to an appropriate resource within the campus. When information sought is not available within SMC, help the patron find the most appropriate outside source.

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Referrals Within SMC: There are many resources on the SMC Campus. Again, you are encouraged to ask other staff in the library or other departments for information. Telephone outside departments to verify their resources if necessary.

Referrals to Santa Monica Public or UCLA Libraries: Before sending a patron to UCLA or Santa Monica Public Library, check their online catalog to make sure the item is in their collection. When computers are unavailable, supply patrons with library information numbers: 310-451-8859 for Santa Monica Public Library; 310-825-7143 for UCLA catalog information.

TYPES OF REQUESTS:

IN PERSON

Order of Service: Try to acknowledge patrons as they approach the desk. The person who has been waiting the longest should be helped first. When a patron is "on hold" on the telephone, you may assist another patron who has a request which can be answered quickly. If patrons waiting for service have to wait longer than five minutes, obtain additional help if it is available.

Time Spent with a Patron:

Ten minutes is a reasonable amount of time for you to spend in assisting one patron, when no one else needs help.

Five minutes is suitable when others are waiting. Flexibility in applying these time guidelines is appropriate. Some instances when extra time may be needed: when working with the elderly, disabled, non-fluent English speaking, or first-time patrons.

Patrons with Special Needs:

When a patron needs additional assistance because of a physical handicap, language barrier, etc., and you are unable to provide that extra help yourself, find another staff member to help, or arrange another time with the patron when you can provide the extra help. For example, a visually impaired person who needs help with the online catalog may also be referred to the High Tech Training Center. Reading Edge users must be properly trained by Staff in the High Tech Training Center (PE 164) before using the equipment in the Library.

If the Reference Desk is too busy for you to help the patron with a special need yourself, you may ask another staff member to help. If you find yourself in a situation where a patron wants more help than is appropriate, use a phrase such as "This should help you get started..."

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TELEPHONE

Telephone patrons are as important as those who come into the library in person, although the depth of services differs.

Order of Service: Questions from patrons present in the library should be given priority. If there are several patrons waiting for assistance and the telephone rings, the telephone is answered and the callers may be told they will be placed "on hold" or encouraged to call back. These callers should not be kept waiting for more than a minute on this "initial hold" without an explanation and without their consent. If the caller is an SMC staff member/administrator, get the name, extension number, and request, and find out when you may call back at a less busy time.

Scope of Reference: Services include checking for up to three items in our collection via the computer catalog or the periodical holdings list, but does not include checking shelves for availability or doing research for the patron. Quick ready reference questions may be answered if time and pressure permits. If the caller is an employee of the college, we will provide the same level of service as if they came into the library in person. If the reference desk is busy, ask a colleague for assistance on the request. In the case of SMC employees, take their phone number and call them back with the information. Telephone reference is restricted to checking the catalog or holdings list for up to three items. Actual research is not done. (1) For patrons best served by coming in to do research, politely tell them this and assure them that reference librarians at desks will help them. (2) If time or pressure permits and information required is of a quick reference nature (e.g., a brief look into an almanac or dictionary), the librarians comply with the request. (3) Keep in mind that what you do can encourage or discourage patrons' realistic and unrealistic expectations of other librarians.

Citing Sources Used in Providing Information: Always cite the source and date of material when providing information in response to a request received over the telephone (see also "Interpreting Information," p. 7).

Requests to Page Patrons: We don't page patrons or search for them in the library in response to telephone-calls. The Confidentiality Law covers disclosure of use of the library as well as disclosure of the materials used. Inform callers that if it is an emergency, they should notify campus police, and the police will search for the person on campus (campus police: ext. 9300).

Patron Use of Telephone: Only faculty and staff members of SMC are allowed to utilize library telephones. Discourage use of public-area telephones, however, and take users to the 9690 extension in the Staff work area.

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REFERENCE LIBRARIANS' RESPONSIBILITIES:

Reference Desks are to be used by reference librarians only.

Reference Desk Surveys: Continual surveys should be kept to be used as needed and tallies are to be recorded on the forms provided for that purpose.

Orientations: (1) Scheduled by librarian who takes the telephone call or who is approached by the instructor. (2) Librarian on duty at time of orientation conducts it. (3) Orientation talks to be held away from the reference desk and other traffic flow areas. (4) Instructor to fill out a form indicating desired content of the orientation, desired length, etc., and attach a copy of assignment if appropriate. (5) Scheduling librarian to initial and date the form and write in orientation time and class on reference calendar. (6) In upper right corner of the form, indicate the day, month, and time of the orientation for quick reference. (7) Instructors to give 24 hours or more notice of orientation request, except for night orientation requests. (8) Orientations are scheduled for as near the top of hour as possible and no later than 30 minutes after the hour because of desk change schedules. (9) Basic orientations should have standard format and present standard information. (10) Only one orientation scheduled per hour, and orientations are scheduled only when librarians are on duty, unless otherwise arranged. (11) Each librarian is responsible for checking the calendar in advance to see if they will be conducting an orientation.

Reserve Requests: Instructors wishing to place items on reserve must fill out reserve book forms. They are to locate and bring to the reference desk or cataloger any SMC books or material that they wish to be placed on reserve.

Online Database Searching: Each librarian should be able to do basic quick searches when needed for faculty, staff, and for students who need biographical information unavailable in our regular collection. DIALOG forms are kept at the reference desk. When BIP books are unavailable, reference librarian on duty fulfills student requests; faculty and staff are allowed access to CIP, CD-ROMs.

Overseeing the Reference Area: While on duty at the reference desk and when time permits, librarians should check the reference area briefly to see that computers, indexes, printers, readers, reference materials, etc. are in order. If repairs or upkeep needed, librarians should attempt minor ones and then refer them to appropriate personnel if attempts are unavailing. Reference librarians who close the library should check to see that the computer and CD-ROM screens are dimmed. Problems, repairs, etc. of the online or CD-ROM databases should be noted in the daily logs.

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Security Procedures/Dispute Settlements: (1) Safety for patrons and library personnel is important. If you, the librarian, feel that a situation is dangerous, proper authorities (e.g., campus police, ext. 4300) should be notified. Otherwise, see Emergency Procedures booklet at the Reference Desk. (2) Routine situations: no eating, drinking, feet on furniture, sleeping, conversation, defacement of materials, etc. in library. Each librarian on duty is responsible for enforcing these rules. (3) If a student is absent from a desk, carrel, etc. for more than 15 minutes after a librarian is notified of his/her absence, then the desk may be claimed by another student. The librarian must bring personal effects left at the desk to the lost and found. (4) At any given time, the maximum number of people that may occupy a single-seat desk/table/carrel/workstation is one person; at a two-seat desk/table/carrel/workstation is two people; at a four-seat desk/table/carrel/workstation is 4 people. (5) If a book in the Main Collection marked "Library Use Only" is wanted for checkout, checkout is allowed after civilly informing the patrons that they will be responsible for replacement of the book at high monetary rate if the book is damaged, lost, or otherwise misappropriated. (6) Other problems are to be reported to the Assistant Dean or other personnel as appropriate.

Monitoring of Children in the Library: The Library is geared to the use of college-level and other adults. Librarians and other staff cannot be responsible for monitoring children. Since the Library wishes to provide an atmosphere conducive to study and research, parents or guardians are to of children who cause disturbances by crying, running, making noise, or exhibition of other disruptive behavior must remove the children from the Library.

Parents or guardians may not send children to the Library without the supervision of an accompanying responsible parent or adult guardian, nor may they leave children in the Library without the supervision of a responsible parent or adult guardian.

Noise/Food Abatement: To be effective, warnings about noise and food/ drink in the library have to be enforced by each librarian. Librarians on duty must speak to patrons observed or reported in violation of the no noise/no food regulations. If patrons persist in disturbances after two warnings, campus security may be called to eject offenders.

Time Spent on Machines: Use of computers, CD-ROMs, etc. should be limited to twenty minutes if others are waiting. Copy machines: ten minutes when others are waiting.

REQUESTS FOR SPECIALIZED INFORMATION

Assignment-Related Questions: We believe that part of the value of class assignments is in the process of learning to locate and use information in the library. We will not intentionally inhibit the process by answering assignment questions for students. We will make all attempts to enhance the process by assisting students to learn to use the materials in the library.

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When limited quantities of material are available in a subject area due to heavy demand, such as for a school assignment, the librarian responsible for reference can pursue the following options:

- 1) Sequestering material (reserve)
- 2) Assembling appropriate material at the reference desk and noting the fact in the reference log.
- 3) Discussing assignment with the instructor and suggesting options. When material is simply not available to meet school assignments, the instructor should be contacted and informed of the situation. This should also be noted in the reference log.

Discarded Library Material: No staff member is allowed to give discarded material to or hold discarded material for a specific patron (except for other SMC departments for instructional use). For example, patrons will ask, "What do you do with your old Life magazines?" The answer is the library staff cannot arrange to give or sell items to individuals until they appear on the "For Sale" truck.

Bibliographies: Bibliographies of the books in the SMC Library will be prepared by librarians upon request from SMC faculty and administrators. Due to the demands of desk and related duties, we are unable to prepare bibliographies on behalf of other patrons. The librarian in charge of reference may determine that preparation of an individual bibliography is appropriate in some cases due to the high interest or timeliness of the topic. If you feel preparation of a bibliography for an individual is appropriate, discuss this with the librarian responsible for reference

INTERPRETING INFORMATION

Citing Information: Do not interpret information. Always cite a source, being sure to include the date.

Consumer Information: You may locate information for the patron in books, periodicals, or other materials. Show the patron how to use the appropriate indexes, but do not assist the patron in interpreting the material found. Refrain from recommending any specific product that may include a personal preference or bias. Do not attempt to read or interpret product evaluations for the patron, either in person or over the phone.

Encyclopedia, Dictionary and Other Reference Evaluations and Endorsements: Staff may not endorse particular titles. Patrons should consult standard reviewing sources. Qualified professional staff may also discuss the merits and/or deficiencies of various reference sources with patrons (e.g., "It has been my experience that World Book offers these advantages ..., while Britannia offers these...").

Medical Questions: In response to medical questions, do not offer medical advice or interpretations of medical information, even when you have had experience with the disease, condition, or medication in question. Do not recommend a specific physician or hospital. Do not attempt to identify a disease, condition, or medication from a description. The patron must specify the disease, condition or medication he wishes to find out about.

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You may locate information for the patron in books, pamphlets, periodicals, or other materials. Show the patron how to use the appropriate indexes, but do not assist the patron in interpreting the material found. Be especially careful to keep your voice pleasant and neutral in order not to imply knowledge or concern.

Telephone reference should be limited to reading definitions of medical terms and descriptions of diseases or conditions from appropriate sources. Cite the source and date, and quote verbatim.

Tax Questions: Give information on the availability of tax forms only. Do not attempt to help patrons decide which tax form they need, and do not answer any questions concerning how they should complete their forms. Encourage patrons to consult tax professionals for specific tax questions. Refer patrons to sites supplying tax forms, such as Santa Monica Public Library.

Tutorial Assistance: You are expected to provide information, but not to interpret it. It is beyond the scope of library service to provide tutorial assistance to patrons. Requests to check homework or proofread a paper should be referred to the instructor or to the College's tutoring programs.

Monetary Appraisals: Values of works of art, antiques, rare books, coins, stamps, currency, etc., are available in published material. Staff should not provide appraisals.

Legal Questions: We are neither trained nor qualified to offer patrons legal advice. Do not interpret materials for patrons, even when pressured to do so. If possible, avoid listening to long explanations of the patron's problems. If you've listened to the "whole song and dance," the patron may interpret your responses as being directed towards his specific problems rather than merely the use of the tools.

Caution the patron that you are unqualified to apply or interpret the law. If necessary, refer the patron to the Assistant Dean of Learning Resources for an explanation of why you cannot do so.

Do not attempt to provide legislative histories.

Limit telephone reference to verification of whether or not the library owns the requested materials. Do not read statutes or material from codes to the patron over the phone, even if he has a precise citation. He may misinterpret your tone of voice, or leave out or insert punctuation or words that could change the interpretation of the material you are reading.

Foreign Language Translations: Foreign word and short phrase translations are available from library sources. Caution the patron that these are literal translations. You should not attempt translations for patrons.

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ACCIDENTS AND INCIDENTS:

The librarian on duty is in charge of the library and LRC for reporting accidents involving patron injury or illness to the college nurse (ext. 9262) An accident report is written whenever a patron accident or problem occurs, or whenever the campus police are called. Librarians must fill out internal library forms also.

COMPLAINTS CONCERNING MATERIALS, STAFF, SERVICES OR OTHER MATTERS:

Complaints always deserve the most careful consideration and reasoned response. You are expected to respond to complaints such as problems with the photocopiers (refer patron to the circulation desk) and loud patrons (the librarian will go and talk with the offenders). Refer more serious complaints to Assistant Dean.

EMERGENCY PROCEDURES:

Acquaint yourself with the procedures and review them from time to time to refresh your memory. Refer to Emergency pamphlets attached to these guidelines for instructions in handling bomb threats, fire threats, etc.

Earthquakes/Aftershocks Evacuations: In the event of an aftershock or earthquake of a magnitude 4.5 or higher on the Richter scale, the Library must be evacuated upon notification by the Administration. The Library will remain closed until it passes a safety inspection by engineers.

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