

**SUBJECT: TYPES OF REFERENCE AND USER INSTRUCTION QUESTIONS**

**EFFECTIVE: JULY 1, 2016**

**SUPERSEDES: 12/2014**

**1. PURPOSE:**

A. Definition of Reference and User Instruction

- 1) Reference and User Instruction is a personal aid to customers searching for information regardless of purpose. It begins by identifying the informational need and then meeting that need using the resources available in the library or by making a referral to resources in other libraries or agencies, if necessary.
- 2) Reference and User Instruction includes both direct and instructional services. Direct service provides the customer with the specific information requested, while instructional service teaches the customer independent use of library resources and technology.

**2. POLICY:**

A. Types of Service Provided:

- 1) Material Requests – Determining the availability and/or locating specific items requested by customers.

*Typical Material Requests:*

- “Do you own a copy of *David Copperfield*?”
- “Is a copy of *Pride and Prejudice* on the shelf?”
- “Can you help me get a copy of *Who Owns the Sun* from another library system?”

- 2) Ready Reference – Answering brief, factual questions, typically within a few minutes, using basic, readily available print and/or online sources such as almanacs, dictionaries, encyclopedias, quick Internet searches, etc.

*Typical Ready Reference Questions:*

- “What is the current population of Florida?”
- “Where is the nearest Post Office?”
- “Who was Dale Mabry?”

- 3) Standard Reference – Providing answers to more complex and time-consuming questions that may involve more than one concept and/or consulting multiple sources.

*Typical Standard Reference Questions:*

- “What is the cost of living in Phoenix compared to Tampa?”
- “I need a biography over 100 pages long on a woman scientist.”
- “I need three different sources of information on the Holocaust.”

- 4) Bibliographic & User Instruction – Teaching customers how to independently

use library materials and equipment such as the library catalog, specialized reference sources, electronic databases, and bibliographic tools. Instruction may take place one-on-one or be incorporated into library tours or group presentations.

*Typical Bibliographic Instruction Questions:*

- “How do I use the library catalog to find cookbooks?”
  - “How can I locate current magazine/newspaper articles online?”
  - “How do I find critical analysis of Hemingway’s writing?”
  - “How do I create a list of articles to send to the printer?”
- 5) Readers’ Advisory – Suggesting or recommending particular titles or authors to readers based upon familiarity with the collection, bibliographies, reading lists, and other print and online Readers’ Advisory tools.

*Typical Readers’ Advisory Questions:*

- “How can I locate mysteries with New Orleans as the locale?”
  - “What other authors write like Stephen King?”
  - “What is a good book on Florida gardening?”
- 6) Document Delivery—i.e., obituaries and news articles.
- 7) Referrals – Directing a customer to another library, agency, or specialist when the resources at hand do not provide the required information or the scope of the request is outside the library’s responsibility.
- 8) Operational/Directional Questions – Giving customers information that facilitates the use of the library building or equipment.

*Typical Operational/Directional Questions:*

- “Where are the restrooms?”
  - “How late are you open?”
  - “Can you give me directions to your branch?”
- 9) E-Government is the use of technology, particularly the Internet, as a means to deliver government services and to facilitate the interaction of the public with government entities. See [LS 310: E-Government](#) for details on handling related questions.

*Typical E-Government Questions:*

- “How do I find the state public assistance websites?”
  - “How do I make an appointment at an Immigration office?”
  - “How do I file for unemployment compensation?”
  - Can you help me find the Property Appraiser’s Website?”
- 10) Technology Instruction – Teaching library customers how to independently use online and computer-based resources such as the Internet, the library catalog, subscription databases, and productivity software provided by the library (e.g., word processing). Technology instruction also includes the use of electronic equipment provided by the library such as photocopiers,

printers, assistive devices, presentation systems and microfilm/fiche reader-printers, and technology required to access/use the library's digital collections such as ebook readers and tablet computers.

*Typical Technology Instruction Questions:*

- "How do I make the photocopier/printer work?"
- "How do I place a hold from my home computer or catalog App?"
- "How do I download an e-book, audio book, magazine, or movie?"
- "Can you show me how to set up an email account?"

**B. Specific Question Guidelines:**

- 1) When a customer's question requires calculation, interpretation, or value judgments, reference staff is limited to providing sources from which the customer can draw independent conclusions.
- 2) School assignments and contest questions should be treated like any other reference question.
- 3) Library Services reserves the right to set limits to specific reference services offered based upon such factors as demand for service, availability of resources, etc.
- 4) Staff does not conduct research for customers. Research is defined as, but not limited to, answering complex questions encompassing the in-depth use of a single source or the comparison and synthesis of many sources. Staff does not answer these questions directly, but offers customers instruction with the goal of enabling them to conduct their own independent research.

*Typical Research Questions:*

- "Can you compile my family's genealogy for me?"
- "What world economic conditions caused the Great Depression?"
- "Can you find me foundations that offer grants to minority small business owners?"

**3. PROCEDURE:**

**A. Limitations to answering specific types of questions apply as follows:**

- 1) Appraisals of old books, manuscripts, paintings, antiques, collectibles, etc. are left to experts, not library staff. Customers are referred to the appropriate reference sources or to consultants or experts. Staff should never give a personal appraisal regarding the value of a customer's possession.
- 2) Business & Financial Advice: Staff does not provide customers with business, investment, or financial advice. Staff can provide assistance in identifying useful sources of information.
- 3) Calculations & Computation: Mathematical calculations, problem solving, or manipulation of data are not performed by staff. If customers do not understand the process involved in making computations, staff can offer

- sources that provide explanations.
- 4) Consumer Evaluations & Product Recommendations: Staff does not make value judgments and/or recommendations for any item. Staff can help customers locate objective product information by showing them how to consult buying guides and online sources. Short published consumer ratings may be read over the telephone; longer articles can be faxed or emailed to the customer.
  - 5) Foreign Language Translations: Translation of foreign language phrases and idioms are not given by staff unless they are proficient in that language or the phrase appears in a source.
    - a) The use of online translation services are permitted as long as the customer agrees to that method.
    - b) Pronunciations, beyond giving diacritical marks, are not made unless the staff member is proficient in the language or it is available electronically.
    - c) Translation of words in non-Roman alphabets are not given unless staff is proficient in that language.
  - 6) Legal Questions: Staff will assist in locating sources of legal information but cannot interpret or explain material. Staff is not able to provide advice pertaining to legal matters, services, or forms.
    - a) Brief, specific citations and definitions can be read verbatim over the telephone; longer citations can be emailed.
    - b) If more information is required, customers are referred to legal directories, the James J. Lunsford Law Library, Bay Area Legal Services, or a lawyer referral service.
    - c) Staff does not perform legal research for customers.
  - 7) Medical Information: Brief definitions and descriptions from authoritative published sources may be provided. These sources are quoted verbatim with no interpretation on the part of the reference staff.
    - a) If more information is required, customers are directed to other material in the library and in subscription databases, or referred to outside sources such as their personal physician, the Shimberg Health Sciences Library at USF, or a physicians' referral service.
  - 8) Patents, Trademarks and Copyrights: Staff does not provide customers with advice concerning patents, trademarks, or copyrights, nor do they conduct patent or trademark searches. Customers are referred to the patent depository at USF Tampa Campus Library's Government Documents Department.
  - 9) Tax Forms & Preparation: Tax Forms and publications are made available online via the IRS website.

- a) Current information on IRS offices, web accessible forms and toll free numbers can be found on the [Tax Information section](#) of the Library's Website.
  - b) Staff does not provide tax advice, interpret or explain forms, or assist customers in completing/submitting their returns.
- 10) Online Forms and Applications: Library staff can provide limited assistance and computer instruction for customers completing online forms and applications (e.g., e-government forms, job applications).
- a) Staff can assist customers with the basic functions of the computer (i.e., keyboard, mouse, etc.), the Internet and productivity software provided by the library (see Technology Instruction above).
  - b) Staff cannot advise customers about which forms or applications they need.
  - c) Staff cannot enter data and/or submit completed forms or applications for customers.
  - d) Library Services is not responsible for the content found on other websites, for any failure of transmission of online applications or forms to other entities, or for the accurate submission of forms or information. Library Services cannot guarantee that other entities receive forms or information submitted from library computers or act on them appropriately. No agreement or contract is created between the customer and the library staff or the Library Services department.

#### **4. AUTHORITY:**

Pursuant to Section 5(1) of [Chapter 84-443](#), Laws of Florida, the Library Board has the duty and the responsibility, among others, to serve in a recommending capacity to the Director of Library Services and to the County Administrator in respect to all matters pertaining to the public library.

Approved:

Andrew Breidenbaugh, Director