

**SUBJECT: REFERENCE AND USER INSTRUCTION MISSION**

**EFFECTIVE: JULY 1, 2016**

**SUPERSEDES: 12/2014**

**1. PURPOSE:**

- A. The Tampa-Hillsborough County Public Library (the Library) provides reference and user instruction in order to facilitate the use of library resources and connect customers to accurate and timely information.

**2. POLICY:**

A. Guiding Principles for Staff:

- 1) Maintain the customer's right to confidentiality in accordance with *Florida Statutes, Chapter 257.261* and the American Library Association's *Code of Ethics*.
- 2) Treat the information needs of all customers as serious and legitimate; act upon them with courtesy, respect, and without discrimination or value judgments.
- 3) Present an approachable demeanor and ensure that customer needs have first priority.
- 4) Utilize appropriate sources, regardless of format and instruct in the use of library resources and the technology used in accessing these resources.

**3. PROCEDURE:**

A. Provision of Quality Reference and User Instruction:

- 1) Adhere to the American Library Association's *Guidelines for Behavioral Performance of Reference and Information Services Providers*.
- 2) Demonstrate a positive customer service attitude throughout the reference interview.

B. Reference and User Instruction Core Competencies:

- 1) Staff should exhibit the following communication skills:
  - a) Be approachable and ready to engage customers by establishing eye contact. Use a friendly greeting and acknowledge others waiting for service.
  - b) Maintain a clutter free, barrier free service desk for visibility and accessibility. Computer monitors, signs, brochure holders, etc. are not to become barriers between staff and customers.

- c) Use the public information area for library business only. Phone calls, conversations, reading, or computer/mobile device use of a personal nature are not to take place there.
  - d) Demonstrate a high level of interest in the customer's inquiries, and signal an understanding of needs through verbal and non-verbal confirmation. Offer to escort the customer to the stacks and willingly assist them in locating materials.
  - e) Frequently rove through the library to offer assistance to customers. Use verbal and nonverbal cues to determine which customers need help, approach and offer assistance. Check back periodically on their progress.
  - f) Demonstrate sensitivity to diverse populations, age groups, and skill levels. Recognize their varying needs and assist appropriately.
  - g) Communicate in a receptive and cordial manner. Allow customers to state their information needs before responding. Tactfully restate the question and ask for confirmation. Use open-ended questioning techniques and clarifying questions to identify the subject area, the type of information requested (such as bibliographical, critical, or factual), the depth and amount of information needed, as well as the currency of information needed. Avoid the use of jargon.
  - h) Refer the customer to another staff member when necessary. Politely ask the customer for permission to refer their question, and ask other staff members for assistance.
- 2) Staff should exhibit competency with Information Sources and Search Skills
- a) Maintain a working knowledge of major reference sources of varying formats, and apply these sources to assist customers.
  - b) Maintain an understanding of the search features of the Library's ILS, online catalog, digital collections, and other resources available through the online library.
  - c) Understand the structure and organization of information for a variety of disciplines and in a variety of formats.
  - d) Select the appropriate source(s) for the question as well as the questioner. Search with skill, and be able to demonstrate and explain the search to the customer.
  - e) Locate and evaluate information resources best suited for answering questions in a variety of subject areas.
  - f) Recommend popular materials and informational resources to supplement customer requests.

- g) Follow up to determine if the question has been answered to the customer's satisfaction.
- 3) Staff should exhibit the following user instruction and presentation skills:
- a) Provide basic instruction in the use of library equipment: computers, printers/copiers, microfilm reader/scanners, various assistive devices, etc.
  - b) Inform customers about document delivery options, and instruct in the use of each method: print, e-mail, mail, fax, downloading to a portable storage device, and interlibrary loan.
  - c) Present information in a clear and concise manner.
  - d) Provide basic instruction in the use of the library's online catalog, digital collections, resources available through the online library, and related technology including but not limited to: Internet searching, e-mail, Microsoft Office products, and portable devices used to access the digital collections.
  - e) Develop basic instructional material and user guides for customer use.
- 4) Staff should exhibit the following computer literacy and technology skills:
- a) Awareness of emerging and evolving information technologies and formats.
  - b) Basic knowledge of computer terminology and the operation of common peripherals.
  - c) Understanding of the structure and workings of the Internet and basic applications: e-mail, Web, etc. Understanding of the Library's network and its component parts: firewall, filtering, ILS, networked printing, computer reservation software, etc.
  - d) Perform minor troubleshooting for computers, peripherals, and other library equipment.
- (1) Staff should demonstrate commitment to professional development.
- a) Branch supervisors are responsible for discussing and reviewing reference policies at least once each year, and encouraging staff to pursue applicable skill development.
  - b) Branch supervisors are responsible for informing new employees about all reference service policies and expectations.
  - c) Take personal responsibility for professional growth by showing a commitment to continuous learning, staying current with information trends, and attending available training.

**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