

## REFERENCE SERVICES & RESOURCE SHARING POLICY

Providing professional reference assistance and resource sharing is a vital service to the community, and the Crete Public Library District (CPLD or just CPL) encourages everyone to use these services. The most recent standards for reference services and resource sharing come from **Serving Our Public: Standards for Illinois Public Libraries**. Additionally, the library has additional agreements with such partners as the Reaching Across Illinois Library System (RAILS) and the SWAN consortium, which may also include minimum standards for these services. These policies apply to services in both the Adult Services and Youth Services departments.

The library's reference services and materials and resource sharing services are available to all persons regardless of age, sex, race, color, ancestry, national origin, citizenship status, religion, disability, sexual orientation, gender identity, or any other category protected by applicable law. The library also understands that it serves a diverse public with unique individual needs and varying levels of ability to conduct research independently.

Services are generally provided by trained staff during all hours that the library is open, though the library may establish guidelines to ensure that all patrons receive fair and equal access to these services within the limitations of staff time and resources.

### **Goals**

- To enable patrons to obtain accurate information in a timely fashion.
- To enable patrons to discover educational and recreational materials of interest.
- To acquire the materials that meet the above criteria.
- To provide a qualified staff to assist all patrons in an efficient, courteous, confidential, and nonjudgmental manner.

Although a library card is not required to receive general reference assistance, it is necessary in order to checkout materials and may be required for certain services, including, but not limited to resource sharing (aka interlibrary loan) and access to Crete Public Library (CPL) databases. Non-residents are welcome to use these services, as well, but for access to some system-, state-, or nation-wide services, a non-resident patron may be directed to their home library.

Reference services are provided in response to all means of inquiry, including telephone, mail, email, and other modes of communication. Priority is given to requests made in person over those made by other means, if both are received at the same time. Any request in progress takes priority over a new request.

### **Reference Services**

Simply put, reference service is personal assistance to patrons in the pursuit of specific information. This can include research assistance, reader's advisory services, and technology and computer assistance, among other things. The library strives to promote information literacy by not only providing patrons with complete and accurate answers to their information questions, but by using and sharing trusted and reliable sources and by instructing patrons in the use of appropriate resources. These resources may include books, audio-visual materials, internet sources, subscription databases, and outside agencies, among others.

Whenever possible and depending on the question, answers to reference questions will be provided at the time of inquiry. If this is not possible, staff will provide an answer within one business day, otherwise a longer response time will be arranged in consultation with the patron. If a question cannot be completed with on-site resources, referral will be made to another source or agency. Such referrals will be verified and/or mediated by library staff.

Staff may set reasonable limits on the amount of time and level of response given to patron requests. Simple requests can usually be answered fully and quickly by staff. More complex questions may require that patrons participate in the process of searching for the needed information, with staff providing guidance and advice on the search strategy and process. Patrons doing in-depth research should expect to receive professional assistance, direction, and library instruction, but will be expected to conduct the actual research themselves.

In the instance of legal, medical, investment, or tax questions, the staff may only guide the patron to the material available on the topic of interest. The staff may not evaluate or interpret the information provided nor may the staff define the meaning of terms, offer investment advice, select income tax forms, or serve as a surrogate for a professional in any of these fields. If materials provided by staff are beyond the understanding of the patron, the patron will be advised to consult with a professional from the above listed fields for additional information or advice.

### **Readers' Advisory Services**

Readers' advisory service involves matching readers, listeners, and viewers to materials of interest in a variety of formats, usually for entertainment purposes, not informational needs.

- Trained staff will interview patrons about their reading interests and use a variety of sources to select potential materials, including professional journals, databases, read-alike lists, and other similar resources.
- Each patron's reading, listening, and viewing tastes will be taken seriously and without judgement, however the nature of readers' advisory also makes personal interpretations and recommendations by staff unavoidable.
- Staff will attempt to provide selections from the library's own collections, then will offer access to resource sharing services if materials are not available on site.
- Readers' advisory is subject to the same policies as other reference services, such as time limitations (see above).

### **Holds**

Patrons can place holds on materials that are either owned by the Crete Public Library but currently checked out to someone else or that are not owned by CPL but are available at other libraries. Holds may be requested in person, by phone, or through other means of communication with staff at the Information Desk or via remote access to the library's resources, such as the online catalog or the library's app. Holds allow patrons to access the collections of hundreds of other libraries through a process called resource sharing (see Resource Sharing section below). [Rev. 06/2018, Rev. again 10/2021 with whole policy]

### **Technology and Computer Assistance**

Library staff will assist patrons with the use of the library's computers and other available technology, such as copiers, scanners, databases, and fax machines, as part of the library's reference services. See the *Technology and Internet Use Policy* for full details.

### **One-on-One Assistance**

Patrons requiring in-depth assistance can make an appointment for a one-on-one session with a staff member. This allows staff to devote the appropriate time to a patron's inquiry without the responsibility of monitoring a public service desk at the same time. Appointments can cover assistance with research questions and readers' advisory, as well as technology assistance.

- Patrons will be assigned a staff member most knowledgeable on their topic.
- Appointments are for up to 60 minutes.
- Patrons can use this service up to three times per month.
- Drop ins will be accommodated based on staff availability.

### **Fees**

While reference and readers' advisory assistance are provided free of charge, certain fees may be passed on to the patron, including, but not limited to, photocopies/printouts, interlibrary loan fees from outside agencies, postage, or online search charges.

### **Staff Training**

The Crete Public Library District encourages staff of all levels to pursue continuing education opportunities which will enable them to better meet the needs of the library's patrons. All staff members receive in-house training regarding appropriate responses to patron questions, including reference questions. This training includes reference interviewing techniques, reader's advisory service, and bibliographic instruction. All staff members are taught to treat each question asked with respect and discretion insofar as the level of assistance required and the topic of the question.

### **Ethics & Standards**

The Crete Public Library District provides these services in accordance with the American Library Association's *Code of Ethics*, *Library Bill of Rights*, *Freedom to Read* statement, and *Freedom to View* statement (see appendix), as well as applicable copyright law. The staff attempts to answer all questions equally, without regard for the purpose of the inquiry. Questions and answers are handled in confidence and with impartiality. Names of users and the transactions which occur between users and the staff are confidential and not discussed outside a professional context unless required by law. Patrons are, however, expected to abide by the library's *Patron Behavior Policy* and any other applicable library policies, include the library's anti-harassment and anti-discrimination policies.

### **Other Limitations**

As information professionals, library staff provide guidance and instruction. Library staff are not able to provide services in other areas of professional practice. Staff do not:

- Engage in conversation or debate of a personal nature, including but not limited to religious or political beliefs, or their personal lives.
- Provide editorial, typing, tutoring, or translation services.
- Recommend individual practitioners (e.g. doctors, lawyers, tutors, repair services, etc.).
- Conduct genealogical, patent, trademark or other in-depth research.
- Complete homework assignments for students. These are intended to be educational for the student, and library staff will guide them to the appropriate resources to complete the assignment.

### **Resource Sharing**

Resource sharing is the process through which libraries make their collections available to the patrons of other libraries, for example, by interlibrary loan or reciprocal borrowing. The Crete

Public Library belongs to a number of library consortia (e.g. RAILS, SWAN, OCLC, ILLINET), through which it is able to borrow materials for its patrons and to lend materials to the patrons of other libraries. The resource sharing activities patrons are usually most familiar with are interlibrary loan and reciprocal borrowing/lending.

## **Interlibrary Loan**

Interlibrary loan is the process by which a library requests materials from or supplies materials to another library. Through the Crete Public Library's resource sharing partners, patrons can access materials from other libraries in Illinois and from other national, and sometimes international, OCLC participating libraries. The requested materials will be sent to CPL, where the patron may checkout or otherwise use the item, based on the stipulations of the owning library. In general, e-content, such as ebooks, e-audiobooks, and downloadable videos, are not available for interlibrary loan due to publisher restrictions.

The library affirms that interlibrary loan is an adjunct to, not a substitute for, the library's own collection. The library will exhaust local resources first, including its own collection and those of libraries in the SWAN shared online catalog and in RAILS, before requesting items from libraries out of the system. The Crete Public Library District endorses the Illinois State Library's *ILLINET Interlibrary Loan Code*.

Eligibility: All aspects of this service are available to patrons holding a Crete Public Library card in good standing. Availability to patrons holding cards from other libraries may be limited, depending on the location or format of the requested item.

Formats: All formats of materials may be requested via interlibrary loan. The library cannot guarantee, however, that the requested materials will be obtainable as lending policies are set by the lending library.

Fees: There is generally no fee for borrowing materials from other libraries in Illinois (unless a charge is passed on from the lending library). Any fees associated with out-of-state materials are the responsibility of the requesting patron. Fees will be discussed with patrons before the materials are requested from the owning library. Once the materials arrive at CPL, the patron is responsible for any fees, regardless of whether or not the materials are ever picked up and/or used by the patron.

Lending Periods: The length of the loan is determined by the lending library, and renewal may be provided at the discretion of the lender. The Crete Public Library will strictly observe any conditions for use of loaned materials that are imposed by the owning library (e.g., short loan period, in library use only, no renewals).

Patron Responsibility: The patron is responsible for picking up the requested item and returning the item in a timely manner. If an item is lost or damaged, the patron is responsible for all overdue fees, the cost of the item, and any processing fees charged by the owning library. When materials are lost or are returned late, the borrowing privileges of both the patron and the Crete Public Library are jeopardized.

Patrons who consistently abuse interlibrary loan borrowing privileges will find their privileges suspended.

## **Lending to Other Libraries**

CPL's resource sharing agreements with other partners stipulate that the library will also loan materials to other libraries. The library endeavors to make available the broadest range of materials for interlibrary lending, but reserves the right to refuse requests. For instance, reference materials, new materials, newspapers, or materials that might be damaged by the delivery service may be reserved for patrons at CPL only. The library also reserves the right to ask a borrowing library to restrict use of the materials sent. CPL's first priority for materials is to the taxpayers of the Crete Public Library District.

Submitting Requests: Libraries may submit requests to CPL through various means (phone, email, fax, electronically, etc.) and can contact the Information Desk for current instructions. All photocopy requests must be in writing indicating copyright compliance.

Loan Periods: Materials being lent by the Crete Public Library will be subject to the current circulation procedures and lending periods. Renewals or special requests will be considered on a case-by-case basis.

Fees: The Crete Public Library does not charge for lending materials to in-state or LVIS libraries. Shipping fees may be charged to non-LVIS and international libraries on a case-by-case basis. An invoice will be sent with the item. The borrowing library is responsible for all lost and damaged materials incurred by their patrons, including any processing fees, if applicable.

## **Reciprocal Borrowing/Lending**

Reciprocal borrowing is the ability of a person who holds a valid library card in good standing from most libraries in Illinois to borrow materials on site from the Crete Public Library under the same conditions that the library provides those materials to its own patrons, subject to reasonable restrictions. In other words, patrons of other libraries may physically visit CPL and checkout many of its materials. CPL agrees to this service as part of its resource sharing agreements. Additionally, CPL patrons can physically travel to many other Illinois libraries and expect the same services. Restrictions may be set by any library limiting the checkout of materials to reciprocal borrowers, including, but not limited to certain formats of materials, new materials, etc. Patrons are encouraged to contact the library they intend to visit and inquire about their reciprocal borrowing restrictions before traveling to the library.

The Board of Library Trustees of the Crete Public Library District will review the Reference and Resource Sharing policy periodically and reserves the right to amend them at any time.

### **See Appendix:**

RAILS Resource Sharing Plan

SWAN Interlibrary Loan Documentation

ALA Library Bill of Rights

ALA Freedom to View Statement

ILLINET Interlibrary Loan Code

ALA. Code of Ethics

ALA Freedom to Read Statement

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