Linscheid Library
Reference Standards and Best Practices

As an active partner in the academic life of East Central University, Linscheid Library shall deliver reference services based on the RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers (2013) and the following best practices.

Approachability

- The Reference Assistant is a primary point of contact for most library patrons. As such, it is crucial that one is open and inviting in a way that encourages assistance and does not make a patron feel intimidated or uncomfortable.
- Establish a priority system to determine whom to help in what order.

  **In-Person**
  - Look up from your work frequently.
  - Acknowledge patrons as they walk past with a smile or nod.
  - Be prepared with welcoming body language and good posture.
  - Look up immediately and greet the patron warmly as they approach the desk.
  - While assisting a patron, acknowledge other patrons that are waiting to be helped.
  - Be identifiable as a library employee. Wear a name tag or lanyard.
  - Occasionally rove the reference area, being careful to notice any patrons that might need assistance.
  - Use verbal or nonverbal cues to determine which patrons need help.

  **Remote**
  - Be timely in your responses.
  - When answering a chat, greet the patron to let them know that you have received their request and are working on it.
  - When answering an email, respond with a greeting.
  - When answering a phone call, clearly identify yourself by name and ask how you can help. Enunciate so you can be understood.

Accessibility

- Try to remain in the reference area as much as possible during your shift.
- Do not use headphones at the Reference Desk or while on call.
- Be on time for your reference shift, and do not leave until your replacement has arrived.

  **In-Person**
  - If you must leave the desk, put the sign up indicating that you will be back soon or to ask at the Circulation Desk.
  - Use the phone for reference purposes only. Keep other work-related calls to a minimum.
  - Be prepared to pause any projects in order to acknowledge patrons.

  **Remote**
  - Make sure chat notifications are enabled and pay attention to them.
If you must leave the desk, change the chat setting to indicate that you are away.
- Check the reference email inbox at regular intervals.
- Check for missed chats at least once per shift.

**Interest**

- Be objective and nonjudgmental with all patrons. Do not interject value judgments about the subject matter or the nature of the question.
- Make the patron feel like their question is important by prioritizing their needs.
- Make the patron feel comfortable. Communicate in a receptive, cordial, and supportive manner.
- Be patient and gracious with your time.
- Show an understanding of the patron’s needs with communication techniques such as asking questions, sharing similar personal experiences, and allowing the patron to respond without interrupting or answering for them.

  **In-Person**
  - When engaged in a conversation with a patron, make eye contact.
  - Demonstrate your interest in the patron’s question with verbal and nonverbal responses.
  - When applicable, leave the desk to help the patron at their work station. When assisting a patron at a public computer, allow them to control the mouse and keyboard and sit or kneel next to them.

  **Remote**
  - When taking extra time to answer a question, let the patron know you are looking into it.

**Listening/Inquiring**

- Allow the patron to fully state their information need in their own words before responding.
- Jot down notes to yourself if you need to.
- Project calm confidence. Don’t panic if you don’t know the answer to a question.
- Use a tone of voice and/or written language appropriate to the patron and the nature of the transaction.
- Rephrase the question or request, if necessary, and ask for confirmation to ensure accurate understanding.
- Seek to clarify confusing terminology and avoid jargon.
- Encourage the patron to expand on the request or present additional information using open-ended questions.
- Refine the search query using closed and/or clarifying questions.
- Respect patron privacy with confidentiality. Do not include patron names when recording a reference transaction.

  **In-Person**
  - While listening to a patron, maintain open and encouraging body language.
Make eye contact, nod, and smile when appropriate. Remember to keep your arms uncrossed.

**Remote**
- If an email question is unclear, answer it to the best of your ability and include confirmation questions to verify that you are on the right track.

**Teaching/Searching**
- If you don’t know the answer to a question, use it as a teaching moment for you and the patron. Demonstrate how to figure out the answer to their question.
- Find out what the patron has already tried, and encourage the patron to contribute their ideas.
- Work with the patron to come up with relevant search terms and identify appropriate sources.
- Explain your search strategy and each step of your search process.
- Try to conduct the search within the patron’s allotted time frame. Do not force a patron to sit through an explanation if they are in a hurry.
- If the topic of research requires more in-depth help, refer the patron to the relevant librarian and encourage them to set up an appointment.

**In-Person**
- Accompany the patron in the initial stages of the search process unless the patron prefers to conduct the search themselves.

**Remote**
- Provide links to online resources when appropriate.
- When answering an email, provide step-by-step instructions and/or research tips that can be applied to the patron’s query.

**Follow-Up**
- After answering a question, ask whether you have provided the needed information.
- Make the patron aware of other available reference platforms (e-mail, chat, etc.).
- If you cannot answer the patron’s question immediately, ask for their contact information so you can do more research and formulate a thorough response.
- Consult with other librarians or experts in the field when additional subject expertise is needed.
- Refer the patron to other sources or institutions if the query cannot be answered by library staff.
- Take care not to end the reference interview prematurely.

**In-Person**
- Occasionally rove through the reference or public areas offering (additional) assistance.
- Encourage the patron to return to the desk if they have further questions.

**Remote**
- Encourage the patron to contact the library again if they have further questions.