

## *REFERENCE SERVICES GUIDELINES*

### *Introduction*

Reference service is the interaction between librarians providing reference assistance and library users. This interaction facilitates the effective and efficient selection, location and utilization of the Library's collections (regardless of format) and services. As an academic library, our role is to teach users how to do research, not to do the research for them.

The library aims to be the first point of contact for information needs of the Kwantlen Community. Kwantlen Librarians strive to provide excellent services through traditional library-based, in-person reference service integrated with new and emerging technology-driven methods such as Virtual Reference (AskAway chat reference).

Librarians recognize and honour intellectual freedom and privacy rights of researchers as outlined in the Library's confidentiality and intellectual freedom guidelines. Librarians adhere to all Library guidelines and procedures in addition to Kwantlen Polytechnic University policies and Principles of Academic Freedom.

The University Librarian is responsible for managing reference services in collaboration with the librarians, including the Chair of the Librarians and Reference Services Coordinator.

### *Purposes of Guidelines*

Reference Services Guidelines have been created to ensure support of the Library's vision, which in turn supports the mission and mandate of Kwantlen Polytechnic University.

Established guidelines ensure that through our reference services we provide streamlined access to a wealth of relevant information resources, and teach our students, faculty, staff and others to find, evaluate, and use these resources, which ultimately encourage research self-sufficiency.

These guidelines assist librarians by outlining a standard of assistance and service levels, and help train librarians new to the Institution.

## *Overview of Reference Services*

Reference services are determined on an annual basis and documented through the University Librarian's Education Plan for the academic year. The Education Plan outlines modes of reference service delivery, and the number of hours dedicated to each taking into account a number of factors not limited to, but including, budget, time, course timetables and challenges of operating within a multi-campus environment.

Modes of Reference Service currently include traditional in-person assistance through Information Desks located at each campus library, by telephone, email, Virtual Reference (AskAway chat reference), individual appointments, and group instruction sessions. Group sessions include workshops and instructor-booked library research and web classes which are usually held in the library's teaching classroom.

Kwantlen library users are primarily registered Kwantlen students, followed by faculty, administrators, staff and alumni. Librarians also assist students from other institutions and members from the community at large. From time-to-time it may be necessary to follow Service Priorities regarding the level of assistance provided based on the nature of affiliation with the Institution, and the nature of the question.

Librarians may from time to time provide answers to specific questions, but their primary goal is to assist students with individual research requests by teaching information skills and literacy that encourages research self-sufficiency. Librarians are conscious of a Duty to Accommodate Users with Disabilities and will, within reason, provide assistance. Often Librarians are the first point of contact for requests for Technical Assistance and will, within reason, try to provide assistance. Librarians do not: administer, proctor or invigilate exams on behalf of others; confirm or initial test and assignment results; act as an intermediary between students and instructors; or accept and distribute work/assignments on behalf of students and instructors because we cannot ensure timely or secure delivery to the relevant person. Students seeking non-reference assistance such as proofreading, editing, or tutoring services should be referred back to their instructor or to the Learning Centre as appropriate.

The Visibility of Reference Services is highly important. Service points and librarians should be readily identifiable.

Librarians adhere to Procedures, Policies, Principles, and selected Standards set by the Library, the Institution or external professional organizations. The Library adheres to, or in some cases has formally adopted, standards and guidelines from appropriate professional associations such as the British Columbia Library Association (BCLA), the Canadian Library Association (CLA ) and Association of College and Research Libraries (ACRL). The Library follows all applicable laws including the British Columbia's Freedom of Information and Protection of Privacy law.

Information used for Evaluation of Reference Services and to inform the Education Plan is collected through library surveys, feedbacks forms, and usage statistics.

Review of the Reference Services guidelines should occur on a consistent basis by the Reference Services Coordinator.

## *Reference Services - Details*

### **Education Plan for Reference Service**

An Education Plan is established by the University Librarian in collaboration with the Librarians on an annual basis prior to the start of an upcoming academic year. This plan establishes the number of reference service hours provided for the year, and the method by which these hours will be distributed. New initiatives are included in the Education Plan and evaluated prior to the formation of subsequent Education Plans. While mid-year changes to the Education Plan can occur, they are rare.

### **Modes of Reference Service Delivery**

All campus libraries provide in-person reference service through an Information Desk. Service hours are, with few exceptions, dictated by the annual Education Plan. In an effort to provide prompt, timely and undivided attention to queries, some service points are redirected to less busy campus libraries. All email queries are answered by Librarians at the Langley Campus Library Information Desk, while all telephone calls are routed to the Richmond Campus Library Information Desk.

- Information Desk. The Information Desk remains a known, and highly visible, point of reference service. The majority of reference service hours allocated through the Education Plan are provided through the 4 campus library Information Desks. Hours are allocated primarily on usage statistics including gate counts and reference statistics, student populations at each campus, and course timetables. Surrey Campus Library Information Desk has the greatest number of service hours with the fewest hours found at Cloverdale Campus. Information Desk schedules are set annually, in advance of the academic year.
- Email. In an effort to consolidate, and answer queries in a timely manner, emails are sent to a generic "Ask a Librarian" account. During the Fall and Spring semesters, all emails are answered by Librarians providing in-person reference services at the Langley Campus Information Desk. During Summer semester and Exam-Intersession periods, a schedule independent of the Langley Campus Information Desk is in place. As necessary, emails may be redirected to another librarian or contact external to the library.
- Virtual Chat reference - AskAway. Kwantlen librarians contribute hours to the provincial AskAway Virtual Chat Reference Service. The librarian who coordinates Kwantlen's AskAway

service develops a schedule in consultation with the team of Kwantlen librarians who provide this service and with the provincial liaison. These hours are noted on the Information Desk Schedule for information purposes only. Librarians participating in AskAway do so from their offices and this service does not conflict with the provision of service from the Information Desk.

- Phone Reference. In an effort to consolidate and answer phone queries in a timely manner, all reference calls are routed through the Librarians providing reference service at the Richmond Campus Library Information Desk. As necessary, phone calls may be redirected to another contact within the library. All non-library related calls are transferred back to the campus switchboard where the operators can provide more efficient routing of the caller to the appropriate contact or department, and free up the librarian to assist other library users.
- By appointment. A relatively new initiative is the provision of assistance through appointments scheduled to meet the convenience of the student. Students can request a 30-minute appointment through an online request form on the Library website.
- Research classes (workshops and instructor requested “library research and web classes”). Scheduled group instruction provides an opportunity for the reference librarian to share the same information, often tailored to a specific topic or research assignment, with a group of students. Current practice is for the librarian scheduled on the Information Desk to provide the instruction. In an effort to provide consistent service levels at the Information Desk, we strive to ensure a “backup” librarian covers the Information Desk or alternate reference services are available.
  - Group Instruction – workshops are organized by a team of librarians focused on information literacy.
  - Group Instruction - Instructor requested Library research and web instruction. Librarians scheduled on the Information Desk may be required to teach groups of student through a formal “library orientation” which is typically held in the library’s teaching classroom.

## ***Service Priorities***

While we strive to provide equitable access to all reference services to all users who request assistance, it must be acknowledged that from time-to-time prioritization of services is necessary given the number of available librarians, time constraints and budget.

Priority is given to registered Kwantlen students, faculty, administrators and staff over community members and students from other educational institutions and external organizations.

Depending on the nature of the question, in some cases it may be necessary to refer users to another library with resources and/or expertise better suited to meet the information needs of the user.

Some services, such as in-depth research assistance “by appointment” are limited to Kwantlen students, and may be limited in number if demand exceeds the allocation as outlined in the Education Plan.

Priority for service, where practical, will be given to users appearing in person, rather than to a telephone caller or email questions. Email reference is routinely checked. AskAway is provided according to a separate schedule agreed upon with our provincial service liaison and does not conflict with other service schedules and priorities.

### ***Duty to Accommodate Users with Disabilities***

While there are no definitive answers as to how much Librarians should do in the way of 'duty to accommodate' users with disabilities, the rule of thumb is to provide the service requested if it can be reasonably done within a reasonable amount of time. Where a request cannot be accommodated please refer users, as appropriate, to the Services for Students with Disabilities office.

The library does provide access to specialized software, a print enlarger, and adaptive technology equipment that may assist users with disabilities. JAWs/Zoomtext software is available on a dedicated computer at each campus library. Librarians are not expected to teach users how to use this software. Students requiring assistance should be referred to the Disability Advisor. A print enlarger is available Langley, Richmond and Surrey campus libraries. Access to adaptive technology equipment is pre-arranged through the Disability Advisor.

### ***Technical Assistance***

Librarians are often asked to provide technical assistance to users. While Librarians should be able to assist with rudimentary requests related to accessing and retrieving library resources users can be referred to the IET helpdesk for assistance. Librarians are not expected to trouble-shoot or train users on non-library related resources. Librarians are not expected to train users on software (e.g. Word, Excel, InDesign) that may be available through library computers. Librarians may assist to the level at which they are comfortable, time-permitting, and/or refer users to the IET helpdesk or their instructor.

### ***Visibility of Reference Services***

To encourage interaction with users, reference services need to be highly visible. Reference service points should be highly visible and easy to identify. Librarians should be readily identifiable and appear approachable. Reference Service points, hours and locations should be widely advertised and readily accessible by the Kwantlen community.

### ***Procedures, Policies, Principles, and selected Standards***

Librarians adhere to guidelines and procedures set by the Library. Many of these, including confidentiality and intellectual freedom statements, are available on the Library's website (see Library Procedures available through the About Us menu option).

Librarians also adhere to Institutional principles and policies. Policy documents (e.g. Plagiarism and Cheating) and the Principles of Academic Freedom document are available on the Kwantlen Website through the “Leadership, Policy & Governance” link available under the “Faculty & Staff” or “Community & Media” menu options.

Additionally the Library looks to the external professional associations like the Association of College and Research Libraries (ACRL) for standards. ACRL creates guidelines so that libraries, academic institutions, and accrediting agencies understand the components of an excellent library. The Library has adopted two ACRL standards: Standards for Libraries in Higher Education; and Guidelines for University Library Services to Undergraduate Students.

### ***Evaluation of Reference Services***

In an effort to inform decisions affecting the annual Education Plan and allocate resources within budget constraints, the library uses a number of different methods to collect statistics and information. External statistics including the Council of Post-Secondary Library Directors (CPSLD) Statistics Report and information sharing amongst peer institutions are also used for benchmarking purposes.

Within the library, statistics from each reference service point are collected and analyzed. At the Information Desks it is the responsibility of librarian at the desk to consistently and accurately record statistics for assistance provided, including telephone queries which are not, at this time, tracked separately. The Librarian responsible for e-mail reference collects and analyzes all email statistics. AskAway statistics are gathered and analyzed for Kwantlen specific information by the Librarian who coordinates Kwantlen’s AskAway service.

Information regarding reference services is also extracted from library surveys and feedback forms.

Comments about the collection are also recorded at the Information Desk. These are used by the subject liaison librarians as possible additions to the collections.

All librarians strive to provide excellent service. In an effort to keep up with new resources, initiatives and ever-changing technologies that may impact their work in reference services the Chair of the Librarians organizes two in-house training days every year.

### ***Guideline Review***

Reference Services guidelines should be reviewed regularly to ensure they continue to support the library’s vision and the mission and mandate of the institution as well as accurately reflect reference service at the Library.

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