

July 12, 2000

Minutes of the regular meeting of the Board of Trustees of the Skokie Public Library held in the Skokie Public Library Board Room, Wednesday, July 12, 2000.

CALL TO ORDER

John Graham, President, called the meeting to order at 7:34 p.m.

Members present: John Graham, President; Diana Hunter, Vice President/President Emerita; Eva D. Weiner, Secretary; Zelda Rich; Richard J. Witry; John M. Wozniak and Carolyn A. Anthony, Director. Susan Greer arrived at 7:42 p.m.

Also present: Architect Robert Hunter of O'Donnell, Wicklund, Pigozzi and Peterson; Skokie resident Carole Riding.

APPROVAL OF THE MINUTES OF THE REGULAR MEETING OF JUNE 14, 2000

Mrs. Hunter made a motion, seconded by Dr. Wozniak, to approve the minutes of the regular meeting of June 14, 2000, subject to additions and/or corrections.

There being no additions or corrections, the minutes were approved and placed on file.

BUILDING PROJECT

The Board agreed to move the regular order of business and skip to Item H (Building Project).

Architect Robert Hunter described the traditional phases and preliminary schedule he has drawn up. Discussion ensued regarding the differences between the construction method vs. design-bid-build. With a construction manager the first step would be for Mr. Hunter to develop a Request for Qualifications. We would then advertise and interview qualified construction managers.

Mrs. Greer arrived at 7:42 p.m.

Discussion continued re general contractors and construction managers.

A motion was made by Mrs. Hunter, seconded by Mrs. Rich:

**MOTION:** That the Board of Library Trustees direct Architect Robert Hunter to prepare a Request for Qualifications for a construction manager.

The motion passed unanimously.

Mrs. Anthony will talk to Library attorney Lorie Slutsky regarding an "Agency CM" contract. Mr. Hunter presented the Board with a new drawing of the first floor plans. The Children's Department would be to the right of the entrance off the Village Green and Readers Services would be straight ahead by the water court in the original building. With this plan, the refreshment center is essentially closed off to youth. Two functions that wouldn't move include Circulation and the Petty Auditorium. More discussion ensued regarding an 'open' view in the lobby and throughout the whole first floor. Mr. Hunter will look at a relocation of the Youth program room to the Northeast corner of the Department. Mr. Graham thanked Mr. Hunter for his presentation. Mr. Hunter left the meeting at 8:38 p.m. The meeting returned to the regular order of business.

### CONSENT AGENDA ITEMS

#### FINANCIAL STATEMENTS LIST OF BILLS

Mrs. Rich made a motion, seconded by Mrs. Greer:

**MOTION:** THAT THE FINANCIAL STATEMENT FOR THE MONTH OF JUNE, 2000, THE LIBRARY NOTE FUND, THE YEAR-TO-DATE BUDGETARY STATUS AND THE LIST OF BILLS BE APPROVED FOR PAYMENT, SUBJECT TO AUDIT.

The roll call vote for approval was unanimous.

CIRCULATION REPORT  
 LIBRARY USE STATISTICS  
 REPORT(S) FROM DEPARTMENT HEAD(S) (1)  
 GIFT  
 CORRESPONDENCE  
PERSONNEL

Dr. Wozniak made a motion, seconded by Mrs. Rich:

- MOTION: THAT THE SKOKIE PUBLIC LIBRARY BOARD OF TRUSTEES PLACE ON FILE THE FOLLOWING CONSENT AGENDA ITEMS:
1. CIRCULATION REPORT
  2. LIBRARY USE STATISTICS
  3. REPORT(S) FROM DEPARTMENT HEAD(S)
  4. GIFT
    - \$250 from Leon Manelis in memory of his mother, Helen Manelis Levinson, for Skokie Public Library recital fund
  5. CORRESPONDENCE
    - Letter from Joanne Bethishou; letter from Jan Schakowsky, Member of Congress; letter from Skokie resident Ruth Dick
  6. PERSONNEL
    - Appointments: Leah Lerner, part-time Clerk; Administrative Office, effective July 5, 2000; Jessica Smith, part-time Computer Assistant, Youth Services Department effective July 6, 2000
    - Resignations: Roberta Johnson, part-time substitute Librarian, Adult Services Department, effective June 10, 2000; Christina Brennan, part-time Bookmobile Assistant, Adult Services Department, effective July 15, 2000.

The motion to place the Consent Agenda items on file was unanimously approved.

#### DIRECTOR'S REPORT

Usage—Circulation in June was up about 1.5% over June of last year. We see a continuation of trends including a slight decrease in book circulation with strong

increases in A-V, particularly video and continuing growth in Mobile Library circulation. Another trend is increasing use of telephone renewal.

Book Sale—The book sale June 9-11 was a big success with a record net profit of \$8,800. Camille Cleland, Assistant Director for Technical Services and Automation Coordinator, again did an admirable job of coordinating the event and many staff volunteered to collect money, restock tables and provide readers' advisory assistance. It seems to become a larger operation each year.

Illinois Humanities Council Grant—The Illinois Humanities Council will fund a presentation on Latin American piano music by Dr. Enrique Alberto Arias October 15. Dr. Arias is on the faculty at DePaul University. The program, a highlight of National Hispanic Heritage Month, will include both speaking and performance by Dr. Arias and also a vocalist.

Company Bankruptcy—Tower Computing Company which has been on retainer for emergency assistance in network support for several years has gone out of business. Because they work on a retainer basis, we have an outstanding balance of \$1,257.50 with the company. A new firm Lighthouse, made up of a number of former Tower employees, has agreed to honor the existing agreement and balance of hours.

Netlibrary Subscription—NSLS has completed an agreement with netLibrary for a subscription to 548 book titles in electronic form. The titles will be available to our patrons as well as to patrons of other NSLS libraries. We don't anticipate a lot of use of this format until such titles can be integrated into the catalog, something which should be possible with our next automation system.

Selection of New Automation Vendor—Various staff spent up to 4.5 days this past month attending demonstrations by vendors of three library automation systems. We will do follow up checking of details at the exhibits at the ALA Annual Conference and hope to present the Board a recommendation at the August meeting.

ALA Annual Conference—A number of staff will attend portions of the conference or visit the exhibits since the Conference is in Chicago. Mrs. Anthony will provide an introduction to a panel on the Brave New Workplace for a LAMA (Library Administrators and Managers Association) program Saturday afternoon. She also has meetings and a hearing of the ALA Task Force on External Accreditation on which she serves and two Urban Libraries Council meetings. She will attend the Advocates dinner Friday evening, recognizing the five selected Illinois library advocates as well as others from throughout the country.

Mrs. Anthony pointed out the letter from Ruth Dick under correspondence. Mrs. Anthony mentioned that today was Harry Potter Day in the Library. Many children came to the Library in costume; Mrs. Anthony also received a phone call from reporter Eric Zorn of the Chicago Tribune regarding Harry Potter.

#### BUILDING PROJECT

Mrs. Anthony pointed out that October 27 is the deadline for Live & Learn Construction Grants from the State. We also received notification that the Library's name was submitted as a recipient for a Member Initiative Grant by Ira I. Silverstein, State Senator. Mrs. Anthony called his office and we are slated for \$20,000.

Mrs. Hunter made the following motion, seconded by Mrs. Greer:

MOTION: That the Board of Library Trustees authorize the Director to apply for a Member Initiative Grant for capital improvement as stated in Senator Ira I. Silverstein's letter of July 7, 2000.

The motion passed unanimously.

#### NON-RESIDENT FEE

After discussion, and note of State law which stipulates that a library Board may not provide services to non-residents for less than the cost of service to residents,

Mr. Witry made the following motion, seconded by Mrs. Hunter:

MOTION: That the Board of Library Trustees increase the cost of a fee card for use of the Skokie Public Library from \$150.00 to \$200.00, with a \$100.00 card for student use as recommended by the Director effective September 1, 2000.

The roll vote for approval was unanimous.

#### NILES TOWNSHIP PROPERTY TAX APPEAL COOPERATIVE

The trustees noted Mrs. Anthony's informational memo regarding the Niles Township Property Tax Appeal Cooperative.

#### REFERENCE AND TELEFACSIMILE POLICIES

After discussion, Mrs. Rich made the following motion, seconded by

Dr. Wozniak:

MOTION: That the Board of Trustees reaffirm approval of the general Reference Policy, Standards and Guidelines and an appendix Telefacsimile Policy with a couple of non-substantive changes that have been made to update terminology. (copies attached)

The motion passed unanimously.

JCPL

The trustees read over the informational materials from our attorney Heidi Katz. Mrs. Anthony should have a recommendation at the August board meeting as to which vendor we have chosen for our new automation system.

LIBRARY CABLE NETWORK CHANNEL 24

The July 2000 Cable Guide was noted by the trustees.

NORTH SUBURBAN LIBRARY SYSTEM

The trustees noted the exceptional report from Pat Groh.

"LIBRARIES HELPING PATRONS GET THE HANG OF NET SURFING",  
CHICAGO TRIBUNE JULY 6, 2000

The trustees noted the above article.

COMMENTS FROM TRUSTEES

Mrs. Anthony called Item N4, Online Learning Opportunities, to the trustees attention.

Mrs. Hunter attended the Mystery Author's Luncheon during ALA. Tim Green, former Chicago Bear, put on a very dynamic presentation.

Mrs. Rich will write a short report about the ALTA-SOS luncheon she attended at ALA. The speaker was from the Secretary of State's office and she was wonderful; she presented the materials well and with a sense of humor.

ADJOURNMENT

At 9:15 p.m., Mr. Witry made a motion to adjourn, seconded by Mrs. Rich. The motion passed unanimously.



---

Eva D. Weiner, Secretary

# 1. REFERENCE POLICY, STANDARDS AND GUIDELINES

## I. Statement of Purpose

Providing excellent reference service is one of the primary goals of Skokie Public Library. Reference service consists of personal assistance provided to users in pursuit of information, formal and informal instruction in the use of the Library and its resources, and the provision of a wide range of information sources, including extension of the Library's information service potential through interlibrary and interagency cooperation, and electronic access to information.

The purpose of this statement of reference policy and guidelines is to:

1. Set standards and guidelines for consistent reference service in anticipating and meeting user needs and demands.
2. Improve the quality of service to the patron.
3. Provide guidance for staff members being trained at the Adult Services and Youth Services desks.
4. Establish criteria for the evaluation of the performance of individual staff and of the department as a whole.

The policies and guidelines stated herein incorporate many of the ideals presented by the American Library Association in the document *Information Services for Information Consumers: Guidelines for Providers*. They also incorporate many of the model reference guidelines established by the Reference Librarians Association of the North Suburban Library System.

## II. General Standards of Reference Service

*Attitude*-- The Library is judged by the attitude of those serving the public. It is essential to maintain a calm, pleasant, honest, attentive, and helpful demeanor, whatever the attitude of the patron. Patrons should be greeted and offered assistance in a pleasant, helpful manner. A positive attitude, courtesy and respect toward other staff is also essential see *All Desk Service Expectations Evaluation Criteria* (Appendix A)

*Information Resources*-- The Library provides access to information resources relevant to its mission and reflecting the interests of the full spectrum of the population it serves. These information resources should satisfy—through quality, quantity, content, and format—a diversity of user needs. Our policy of collection and resource development to meet the informational needs of the community is implemented and periodically revised to reflect changing needs within the community.



*Privacy*-- Reference transactions with patrons are to be treated with complete confidentiality.

*Judgment*-- Staff should consistently follow library guidelines in order to best serve the library's users. Professional judgment and discretion guide staff in making rare exceptions to guidelines.

*Ethics*-- The American Library Association's Code of Ethics (as stated in the ALA Policy Manual in the ALA Handbook of Organization) governs the conduct of all staff members providing information service. The *ALA Statement of Professional Ethics* states:

1. Librarians must provide the highest level of service through appropriate and usefully organized collections, fair and equitable circulation and service policies, and skillful, accurate, unbiased, and courteous responses to all requests for assistance.
2. Librarians must resist all efforts by groups or individuals to censor library materials.
3. Librarians must protect each user's right to privacy with respect to information sought or received, and materials consulted, borrowed, or acquired.
4. Librarians must adhere to the principles of due process and equality of opportunity in peer relationships and personnel actions.
5. Librarians must distinguish clearly in their actions and statements between their personal philosophies and attitudes and those of an institution or professional body.
6. Librarians must avoid situations in which personal interests might be served or financial benefits gained at the expense of library users, colleagues, or the employing institution.

### **III. Desk Staff Service Expectations**

Note: The following sections are from the *Desk Staff Service Expectations Evaluation Criteria*. The full document is available (Appendix A) as well as *All Staff Service Expectations Evaluation Criteria*.

***Approachability; acts in a manner that encourages patrons to ask questions.***

Benchmark/Expected Behaviors:

- consistently exhibits a professional attitude and appearance that welcomes patrons and invites inquiries
- keeps conversations at the desk quiet and to a minimum; looks up frequently and stops conversations when patron is approaching
- makes eye contact with patrons approaching desk, presents a pleasant facial expression and greets patron in a friendly manner (for example with "hello" or "may I help you?")
- gives patron undivided attention; remains calm and is helpful to patrons

- acknowledges waiting patrons and assures them they will be helped as soon as is appropriate
- leaves desk to approach patrons who appear to need assistance
- does only appropriate Library-related work at public service desk

Exceeds:

- exhibits all benchmark behaviors **plus** the following
- notices when desk is busy and serves patrons even when not scheduled at a desk
- notices barriers to approachability and offers suggestions to overcome them
- turns confrontation into respectful dialogue

***Conducts Reference Interview and Follow-Through According to the Following Behaviors.***

Benchmark/Expected Behaviors:

- listens carefully and allows patron to finish asking question before responding; asks clarifying and verifying questions
- shows tact and sensitivity to patron's level of understanding and evaluates individual needs
- exhibits respect for the legitimacy and worth of patron's question and a non-judgmental attitude toward it
- accompanies patron to shelf if patron wants or needs this help as well as invites the patron to check back at the desk if they aren't satisfied with findings
- adequately explains to the patron how to use our resources
- gives accurate and complete information, asks help of coworkers if needed and cites sources
- asks follow-up question such as "Have you found what you needed?" or "Have I completely answered your question?"
- offers outside options if patron does not find exactly what is needed at the Library
- gives name when asked

Exceeds:

- exhibits all benchmark behaviors **plus** the following
- continues working on patron's difficult question during off-desk time
- takes initiative to research other options rather than only suggesting these options
- periodically monitors patron's progress, showing continued willingness to help, in between other patron transactions

***Knows and Follows Library Guidelines.***

Benchmark/Expected Behaviors:

- has read and knows location of Service Statement and Service Expectations, policies and procedures, Personnel Code and Employee Guide
- follows the information in these documents
- wears staff name tag while at work
- does not abuse telephone for personal use
- checks out all Library materials for personal use
  - is adept at using the phone system including voice mail

Exceeds:

- exhibits all benchmark behaviors **plus** the following
- takes the initiative to suggest improvements in guidelines and/or participates in writing or revising guidelines
- displays a positive attitude in following guidelines

***Exhibits Teamwork Regarding Working at the Desk.***

**Benchmark/Expected Behaviors:**

- is cooperative and willing to help with reference questions at desk
- informs colleagues when leaving desk
- arrives punctually for desk hours; returns from breaks and mealtimes promptly
- gives in depth assistance on an appointment basis only
- accommodates and is sensitive to work flow and pace of activity at the desk; balances work with one patron on the floor with the needs of staff and other patrons at the desk
- defers extensive individual assistance of patron to later time by taking phone number for call back when it is less busy
- willingly shares expertise with other staff and exhibits professional respect for the knowledge and abilities of other staff
- puts away tools used before going off the desk
- is willing to fill in or change desk hours when asked
- expresses willingness to help fellow staff desk with difficult situations

**Exceeds:**

- exhibits all benchmark behaviors **plus** the following
- encourages teamwork through encouragement and praise
- helps at desk even when not scheduled when there is a need without being asked
- develops procedures which make desk run more efficiently; receptive to new ideas and ways of doing things
- maintains consistent level of performance under conditions of stress or uncertainty

***Exhibits Knowledge of Materials and Sources; Continues to Develop Knowledge of Collections and Resources***

**Benchmark/Expected Behaviors:**

- is familiar with basic information sources and reference tools and uses them efficiently
- is familiar with the SKO-KEY system and uses it efficiently
- keeps abreast of current issues in the profession
- demonstrates proficiency in use of equipment used for patron service
- is familiar with new materials and resources, both print and electronic
- takes advantage of continuing education opportunities
- perfects readers advisory skill by reading a variety of books, book lists and readers advisory tools.

**Exceeds:**

- exhibits all benchmark behaviors **plus** the following
- consistently shares new information and techniques with other staff
- demonstrates creative thinking in using all available resources in satisfying patron needs
- has a comprehensive knowledge of our resources **and** is aware of what is available at other libraries and institutions
- has expertise in one or more fields and applies this knowledge to searches
- prepares and presents workshops on reference and/or readers advisory tools and services

#### **IV. General Desk Guidelines**

*Reference Users*-- Service is provided to all persons regardless of age, sex, nationality, appearance, religion, race, social or economic status, disability, or place of residence.

*Basic Assistance*-- Reference staff should never assume that a patron knows how to locate library materials or use online resources. Assistance should be offered whenever a patron needs assistance or appears to need it. The staff member should provide as much instruction and assistance as the patron needs and time permits consistent with these Reference Standards and Guidelines.

*Extended Instruction*-- If patrons request more instruction than time allows, they should be referred to the support and training guides available at the Library.

- *Computer based training modules [CBT's]* are available for many databases at the workstation. Both the Library-created modules and the help features right in the programs should prove useful if the patron is willing to give them some time.
- *Printed job-aids* are available for SKO-KEY resources including the Internet. These resources include sample searches and more detail than the CBT's.
- *Multimedia computer training courses* are available for many computer applications.
- *Volunteer computer trainers* are available by appointment to assist in user training on office applications and the Internet.
- *Staff roving technology guides* are available during busy periods for basic assistance.
- *Skokie Public Library technology training sessions.*

If a user needs additional personalized assistance from desk staff, it may be necessary to set up a time for extended instruction. Staff members offering their services should make appointments for up to 30 minutes to occur during their off-desk time.

*Priority*-- While at any Desk, service to the public should be given priority over other duties. Reference questions are received from patrons present in the Library, as well as through the telephone, fax, email (the library's Home Page has an "Ask a Librarian" option) and U.S. Mail. Questions from patrons present in the Library are given top priority. Questions received from remote patrons are dealt with in the order in which they are received.

#### *Examples:*

- Generally if you are assisting an in-house patron and you must answer the phone, give the caller an option to be placed on hold, called back, or at your discretion, you may answer a short question.
- If a caller is on hold and additional patrons approach the desk, take caller's name, telephone number and question, and return the call as soon as possible; route subsequent calls to voice mail (when possible) until in house traffic subsides.
- If a patron approaches when you are on the phone end the call as quickly as possible or take the caller's name and telephone number. Return the call as soon as possible.

It may often be necessary to work with several people at once; getting each started and then returning to make sure each patron is finding information. You may offer to complete the question at another time contacting the patron by telephone.

When the desk is very busy, and patrons are queuing up for long periods of time, a reference librarian who is off desk should be asked to assist until the rush subsides.

*Statistics--* Accurate statistics regarding service to patrons are recorded bimonthly. The methods used to gather statistics are based on *Output Measures for Public Libraries*. Desk staff should be careful to distinguish information transactions, reference transactions, and reader's advisory transactions from each other. Each request from a patron should be counted separately regardless of the number of sources consulted or gathered. Requests may come in person, by phone, by mail or electronically. Definitions and examples are listed on the statistics sheets (Appendix B).

*The Reference Interview--* The key to successful reference service is the reference interview. The purpose of the reference interview is to define the patron's information needs, including time frame and the depth of information needed. Skokie Public Library is committed to practicing all the behaviors that contribute to providing correct answers to reference questions.

### STAGES OF A REFERENCE INTERVIEW

<u>Stage</u>	<u>Sets of Behaviors</u>	<u>Specific Minimum Required Behaviors</u>
1) Setting the Tone	Approachability	Smiles Makes eye contact Gives friendly greeting Is at same eye level as patron
2) Getting the Facts	Interest	Maintains eye contact Makes attentive comments ("I see," "Uh-huh") Gives patron full attention Speaks in a comfortable, relaxed tone
	Listening	Does not interrupt patron *Paraphrases or repeats to demonstrate understanding *Asks clarifying questions if not sure of patron's question
	Inquiring	*Asks open questions to probe *Verifies specific question (before searching) by paraphrasing and using a closed question
	Searching	Involves the patron as much as possible in the research process Keeps patron informed of progress

		of staff research on the question Offers referral if answer not found in house
3) Giving Information	Informing	Speaks clearly and distinctly Cites the source Checks with patron to be sure answer is understood
4) Following-Up	Follow-Up	*Asks "Does this completely answer your question?" or other appropriate follow-up question

\*The five most important behaviors associated with providing correct answers to reference questions.

The two most important elements of the interview are VERIFYING the patron's specific question, that is repeating the request back to patron in your own words and asking a FOLLOW-UP question at the conclusion of the information transaction (i.e., "Does that completely answer your question?")

*Limitations on Reference Service*--A patron should not be allowed to monopolize a staff member's time to the detriment of service to other patrons. Reference staff may ask patrons to perform tasks that are time consuming and that do not require a library employee's skill. Whenever the patron is asked to do his/her own research, the staff member should assist the patron in getting started by directing the patron to the appropriate resources and should return to check on the patron's progress. If possible, the staff member should verify the patron's satisfaction upon his/her exit from the reference area and should offer further assistance if required.

-- Patrons may be invited to the staff side of the Information Services Desk to observe the process being employed by the librarian on a computer to obtain the information requested. Patrons should be allowed to observe for no longer than 15 minutes. Patrons should never be allowed to sit and use desk computers. It is preferable to perform such demonstrations at a public computer when possible.

-- In the provision of service to patrons, it is best to print citations or abstracts from databases containing full text. If the patron seeks full text, you may assist them in locating the material on public workstations where they may be printed out with a copy card. In the case of the Internet, one page of text should be printed with the URL displayed. The patron should then be directed to the public Internet workstations where they may be assisted in locating and printing more detailed information.

-- The Reference staff is available for limited help with technical problems on the public access computers. They should not instruct individuals in the use of public access computers for office applications. Users are asked to familiarize themselves with the hardware and software they are using. Tutorials and guides are available for this purpose.

*Performance of Off-Desk Tasks*--The key to working at any public desk is remaining totally approachable at all times. Off-desk tasks have low priority when on duty at the Reference Desk. During slow periods, while on duty at the Reference Desk, reference related tasks should be given priority over off-desk tasks.

Reference related tasks include: Studying materials directly related to a pending patron question; looking at service and desk information binders, memos and notebooks; examining new materials including those on the New Reference Bookshelf. Scanning professional journals and selection tools are considered off-desk tasks. For further details on this topic, see *Appropriate and Inappropriate Desk Activities* (Appendix C).

*Incomplete Reference Transactions*--Unresolved reference questions should be passed on to the next shift. Staff should take the time to summarize the work that has been done on questions being passed on. This may be done verbally, but some written record on a yellow slip is preferable. If the question lingers because it is busy, or the question is particularly tough, a written record will prevent the duplication of effort. If you wish to continue working on a question beyond your shift, leave a slip in the folder on the door to the phone room, so that we are accountable if the patron calls back. The important thing is not to leave the desk without documenting the status of the question.

The requested information should be provided to the patron within 24 hours or the patron should be informed of the status of the request within that same 24 hours. Reference staff should consult with other staff members whose specialized knowledge might be helpful in answering a question. Problem questions should be brought to the attention of the Coordinator of Information Services or the Assistant Coordinator of Information Services for decisions on their appropriate disposition.

*Referral Guidelines*-- Referrals should not usually be given as a first response to a request for information. Between the resources available to us and the collective expertise of our staff, we should be able to supply some information on most topics. If, after you are reasonably assured by your work and the opinion of your colleagues, that we do not have access to the necessary resources to answer the question, or, if the patron expresses a need for more information than has been supplied, a referral should be made to another institution.

If you believe that a call to a large institution might produce results, if time permits, and the call is within our local calling area, try contacting the referral agency yourself first. In this way you may ascertain whether the referral is appropriate. Sometimes an institution that does not handle the type of referral you are trying to make will know of another institution that has the appropriate information.

Some examples:

1. Patron is interested in collecting a particular form of porcelain. You have given them books and checked for articles on the topic but more detail is needed. An association of collectors of this specific type is located in the Encyclopedia of Associations--Referral appropriate.

2. Patron has a technical question on eligibility for college financial aid. You have shown them books and brochures on the topic but the answer to the question is not apparent. You find a reference to a Federal financial aid hotline in the brochure and suggest they try it--Referral appropriate.
3. Patron is looking for information on a new prescription medication. The Health Reference Center and Physicians Desk Reference are checked with no results. A referral is made to the Food and Drug Administration.--Referral inappropriate: There are a number of online and loose-leaf services available to the Library with the most current information on prescription drugs. Holding the question for a colleague aware of other options would be the appropriate action.

When giving a patron a referral number, always indicate that they should get back to us should the referral be a dead end--keep the process open ended. We do not want to convey the impression to the user that we are giving them the “run around”.

*Referrals to NSLS*-- Back up reference is still available from NSLS from the Night Owl Service. SRS/Night Owl is available to all NSLS member libraries when there are requests for information that cannot be answered from the resources of the local library. See System Reference Service/Night Owl Procedures Handout (Appendix D)

*Interlibrary Loan*--When someone requests an item that is not owned by the Skokie Public Library the librarian should offer to provide the patron with alternatives to obtain the item. The NSLS *Liaison* catalog or OCLC WorldCat can be consulted to identify libraries owning the item. The patron should then be offered the options of traveling to a library owning the item, or of obtaining it through interlibrary loan. If it is a recent or popular item, a request for purchase should be suggested.

For a more complete explanation of interlibrary loan, see *Skokie Public Library Interlibrary Loan Policy* (Appendix E).

*Advice and Personal Opinion*--Librarians may advise patrons regarding the relative merits of sources and make recommendations regarding library materials when appropriate. Materials recommended should be the most comprehensive and the most current available. Staff members should be careful in giving patrons their personal opinions or providing information based on their experience rather than library materials or research. Staff members who feel qualified to give advice should make it clear that their opinions are personal and not a function of their position at the Library. A staff member's refusal to give advice that falls outside of reader's advisory or factual information service should not be considered as a refusal to provide information.

*Specialized Knowledge and Skills*--Staff with special skills or knowledge, such as advanced knowledge of computer science, job hunting, or foreign language ability, may be called upon to assist a patron, but should be consulted before the patron is assured that help will be provided.



*Identification Held for Use of Reference Materials*--The patron's identification should be held for selected materials kept at the Reference Desk. A library card is preferable; credit cards are not acceptable. Materials for which identification is held with have "HOLD ID" marked on the sign-out card. Only materials decided upon by the Coordinator of Information Services or the Assistant Coordinator of Information Services should be placed in this category. Patrons demanding use of materials without submitting identification should be referred to the Coordinator of Information Services, the Associate Director for Public Services or the Head of Adult Services.

*Infopasses*--Infopasses should be provided only when the Library's collection and resources is judged inadequate to meet a patron's needs. Infopasses should be provided for private academic libraries that have restricted access such as Northwestern University or University of Chicago. Sometimes passes are only needed for evening or weekend hours. Infopasses for high school students should generally be provided by their school library.

*Books for Class Assignments*--Books related to school assignments may be set aside at public service desks for in-library use, upon the teacher's request or when a need becomes apparent to the Reference Staff. If the Library owns more than one copy of a book related to the assignment, the duplicate copy may stay in circulation. Books set aside for assignments may not be checked out overnight. They may be signed out from the Reference Desk for in-library use, just as other reference books kept at the Reference Desk. Occasionally books may be loaned to the teacher or school librarian for use at the school.

*Service to Young People and Children*--The reference collection of the Adult Services Department is generally planned to serve patrons who have attained at least a ninth-grade level education. Special materials are available for adults who need literacy assistance. Reference service to young people and children in the Adult Services Department should be no different than service to adults, but it should be determined whether the patron would be better served by the Youth Services Department or the Adult Services Department. The same guideline holds for adult patrons requesting reference information in the Youth Services Department.

*Appointments*--Staff members may offer to set up an appointment to meet with patrons who need extensive assistance. These appointments should not exceed one-half hour. Public desk staffing and other regular library duties should take precedence over these appointments. Appointments should not be scheduled while the staff member is on duty at a public desk. The purpose of these appointments should be to recommend and introduce appropriate library resources--not to provide specific answers for a list of questions or give personal advice and opinions. The appointment should be made within the framework of the current week's schedule.

*Unshelved Reference Books*--If a reference book cannot be located immediately upon request, the staff member should offer to call the patron with information regarding the book's whereabouts. If the book cannot be found by the following day, the Coordinator

of Information Services or the Assistant Coordinator of Information Services should be so informed by the staff member handling the request.

## V. Telephone Reference

Public service desk staff should always answer the telephone cordially with mention of the department's name. The Telephone Reference Center at the Information Services Desk has a direct phone line. Therefore, the name of the library as well as the department name should be mentioned.

Examples:

- "Skokie Public Library Reference Desk, how may I help you?"
- "Skokie Public Library Reference Desk, \_\_\_\_\_ speaking." [giving your name];
- "Youth Services Desk, how may I help you?"
- "Reader's Services Desk, this is \_\_\_\_\_ speaking." [giving your name].

Although telephone reference questions should be answered as completely as possible, replies should be given within a period of time which will not unfairly deprive other telephone patrons or in-building patrons of service. Patrons should not be kept waiting on hold for more than two minutes during the search for the information requested. Unless the request can be handled within this period, it is preferable to request the patron's name and phone number and to call them back with the requested information or suggest that they come to the Library for further assistance.

If it is necessary to put a caller on hold, the staff member should politely alert the caller before doing so and then push the hold button. Unattended telephone calls should always be placed on hold. When a call must be transferred to another desk or department, the caller should be informed to whom or to which desk he or she is being transferred, and the staff member receiving the call should be given a brief explanation of why the call is being transferred. When a question is received via voicemail, a return call either acknowledging or answering the question should be made within 30 minutes.

If it would be more practical to FAX the information required to answer the telephone request, the staff member should offer to FAX the information, as long as such use of the FAX machine falls within the Library's stated FAX policies and procedures (See Appendix F for details)

Long distance telephone questions should be treated like other requests received by telephone, except that it may be suggested, when appropriate, that the patron contact his or her local library. If the question cannot be answered quickly, the staff member should suggest the patron call back at a specified time. We generally do not return long distance phone requests, so be sure to make the patron aware that they will need to call us back to follow through on their question.

Staff should check the catalog and shelves for a maximum of three books per telephone request. If it is expected that the search will take more than two minutes, the patron should be called back with the information. A maximum of three requests for information may be taken per-phone call. If a caller has more extensive requests, a trip to the Library or a call at a later date should be advised.

**VI. Facsimile--** Refer to the *New Fax Policy* (Appendix F).

## **VII. Computer Competencies**

Reference staff are expected be competent in the basic operation and usage of computers in the Library. The Library will provide training opportunities to assist staff in successfully mastering these skills.

The skills enumerated relate to the four primary computer usages in the Reference area of the Library:

- *Public Access Computers* utilized by patrons for word processing and other office applications.
- *Local Area Network (LAN) Workstations* utilized by patrons and staff for access to SKO-KEY databases.
- *Internet Workstations* utilized by patrons to access the Internet.
- *Multimedia Workstations* utilized by patrons to access multimedia CD-ROM products.

### *General Computer Competencies*

1. Ability to turn on and boot up all Library computers.
2. Ability to effectively operate a mouse.
3. Ability to format a diskette.
4. Ability to organize and manipulate computer files and documents.
5. Familiarity with basic Windows operations such as minimizing and maximizing windows and multi-tasking.
6. Ability to print documents and switch printers.
7. Ability to add paper to printers and clear paper jams.
8. Ability to recognize and react appropriately to vandalism and abuse of Library computers and peripherals (see Appendix G).
9. Ability to troubleshoot basic malfunctions of Library computers [see the *Computer Troubleshooting Manual* found at all public service desks].

### *Public Access Computers--*

1. Ability to assist users to open all applications on the computers.
2. Ability to locate and provide appropriate application manuals for patron use.
3. Ability to assist users in saving and/or printing documents generated on the computers.
4. Ability to exit all applications.

#### *LAN Workstations--*

1. Ability to assist patrons in locating and accessing all databases and training modules available on the SKO-KEY system.
2. Ability to assist patrons in basic usage of LAN databases and training modules.
3. Ability to exit all LAN databases and training modules.
4. Ability to assist patrons in printing or saving output from LAN databases.

#### *Internet Workstations--*

1. Ability to access the World Wide Web browser on the LAN.
2. Familiarity with Library's' Appropriate Internet Usage Statement (Appendix H).
3. Ability to assist a user in entering and accessing a URL.
4. Ability to assist a user in locating and using bookmarked resources.
5. Familiarity with location and usage of major Internet search engines and subject lists.
6. Ability to assist a user in printing or saving documents found on the Internet.
7. Ability to assist a patron in utilizing telnet.
8. Ability to assist patrons in aborting "frozen" transmissions.
9. Ability to exit the Internet and return to the SKO-KEY menu.

#### *Multimedia Workstations--*

1. Ability to start up CD-ROM programs housed in the disk changers or from the supply kept at the Periodicals Desk.
2. Ability to exit CD-ROM applications.

### **VIII. Online Searching**

Online searching may be done for Skokie Public Library cardholders at the discretion of the reference staff member in order to save time and/or in order to provide more complete or more current information. The judgment of the Reference Desk staff will prevail in determining whether or not an online database is the most appropriate resource to use.

**Online searches are not conducted on demand.** Online searches are not always able to be performed immediately. If it is a busy time, or if the intake librarian is not comfortable searching a particular database, the patron should be informed that the search will be performed as soon as possible.

Occasionally, an online search for a **specific piece of information** may be performed for a non-Skokie resident. This type of search is performed by the librarian as the most efficient way to locate a specific item or citation. Under no circumstance, should subject searching, full text or searches with long format output be undertaken for non-residents. We do not do searches for a fee for non-Skokie residents. If a non-Skokie patron wants us to do an online search for them for a fee, you should refer the patron to the Dialog Search Service which will do a "Dialsearch" for anyone for a fee or to an information broker.

If the cost of the online search will likely exceed \$25.00, the patron should be informed that they will have to cover the excess amount. A good way of estimating cost is to run the search and print out 1 or 2 of the results in the format the patron desires. The cost of the test should provide a basis for an estimate of the amount of expense of a printout of the total search. If the search exceeds the \$25.00 limit by a small amount & the patron has not been informed prior to the search, do not mention the charge. The \$25.00 amount is only a guideline for limiting broad or expensive searches.

The monetary limit applies per request or log on. If you feel a patron is abusing the privilege, contact a supervisor for a ruling. There is no specific limit on the number of searches we will conduct for an individual patron within a given period of time.

## **IX Specific Question Guidelines**

*School Assignments*-- Every effort should be made to satisfactorily answer the student's question(s) *and* provide the sources for information and the instruction needed to use those sources. The student is expected to use that material to meet the requirements of the assignment, but questions posed by the student as reference questions, whether they are assigned questions or not, should be answered by reference staff. Reference staff should not, however, interpret or "write" the paper for the student or organize the information into the exact configuration needed to fulfill the assignment.

If every effort has been made by the reference staff and the student to locate information, without success, the student will be encouraged to return to the teacher for further instructions or an altered assignment. A note to this effect may be given the student if the staff member feels it is justified.

*Multiple Questions*--A patron with multiple questions should be given guidance and assistance, but staff members cannot assume the responsibility of providing specific answers when presented with a series of questions all at the same time. Three questions at one time is a reasonable number of questions to be answered at one session.

*Contest Questions*-- Simple, factual questions are treated as any other question. Some contest questions are tricky and might have more than one answer which seems to be correct. The Library takes no responsibility to guarantee that the answer provided is the correct answer for any particular contest. Reference staff should not conduct lengthy searches, interpret contest rules, or do work that should be done by patrons, such as writing paragraphs.

*Consumer Evaluations*-- Reference staff should help patrons locate objective consumer product information by showing them how to consult the indexes to *Consumer Reports* and related magazines, encyclopedia buying guides, and/or general electronic databases such as InfoTrac, which may lead to product evaluations in other periodicals. Staff members should not offer personal opinions recommending one product or another.

*Book, Antique and Art Appraisals*--Reference staff should not make any appraisals or estimates of monetary value of works of art, antiques, rare books, coins, stamps, currency or other collectibles. Patrons requesting such information should be referred to the appropriate reference sources or to consultants or dealers.

*Critical Analyses of Literary Works*-- Except for reference transactions which fall specifically within the category of reader's advisory transactions, reference staff should not provide *personal* critical analyses, interpretations, or judgments regarding the merit of literary works (or the patron's own writing efforts).

*Genealogical Questions*-- Reference staff should provide general assistance in genealogical research, guidance in locating materials in the collections, and assistance in locating and using the resources available through interlibrary loan. Except for simple obituary requests, staff members should not engage in actual genealogical research for patrons.

*Translations*-- Translations are provided only if a person on the Library staff with appropriate expertise is available and agrees to provide this service. Generally, translations consist of perusing a document to give a general idea of the contents. Complete word-for-word translations should not exceed two or three sentences. Otherwise, the staff member should use appropriate resources to obtain information regarding professional translators..

*In-Depth Research*--Reference research usually consists of the location of specific facts, or the identification and provision of resources on a topic. Patrons needing extensive compilations or research (bibliographies, lists, statistics, etc.) should be directed to the appropriate resources and offered as much assistance as staff time allows. Staff time should be spent gathering resources relevant to the patrons request. Interpretation or development of an argument or theme should be left to the patron.

*Mathematical Calculations*-- Reference staff may perform simple mathematical calculations for patrons as time and skill allow. Calculations requiring more than an elementary knowledge of arithmetic should be left to the patron. Mathematical reference resources may be consulted.

*Medical and Legal Questions*-- Librarians do not provide advice in the areas of law or medicine. If such information can be found in reference sources, it is provided. However, the comprehensiveness of complex legal or medical searches should not be guaranteed. In regard to telephone requests for medical information, brief definitions and descriptions from authoritative published sources may be provided. These sources should be quoted verbatim with absolutely no personal interpretation. The patron should be informed of the source(s) of the information provided. Under no circumstances should the staff member offer advice in these areas, regardless of how commonplace the knowledge seems to be. If more information is required, the patron should be encouraged to examine the appropriate resources at the Library, and/or should be referred to a more appropriate source outside the Library.

Staff members should be aware that authoritatively offering unqualified advice could legally result in the liability of the Library for losses or damages incurred as a result of the advice or information taken by the patron.

*Criss-Cross Directories*-- Criss-Cross inquiries should be answered by telephone or in person. No more than three requests should be answered per patron at any one time. A maximum of two "nearby's" per listing, if requested, should be provided. Therefore, a maximum of nine listings may be provided (3 listings with 2 nearby's for each listing). Patrons requiring more should be informed of this policy, and should be invited to come to the Library to use the directories in person.

## **X. Loan of Reference Materials**

Only patrons with North Suburban Library System member cards have Skokie Public Library borrowing privileges. Fee cards are available for patrons outside the north suburban area. Disabled persons may obtain borrowing privileges without regard to residency through the Community Services Office.

With the approval of the staff member on duty at the Reference Desk, reference materials may be signed out from the Library. They are signed out at the Reference Desk and must be returned to the Reference Desk. The staff member should first determine that another copy is not available in the circulating collection.

The loan period should be as brief as possible--overnight to three days. Longer periods must be approved by the Coordinator of Information Services, the Assistant Coordinator of Information Services, the Associate Director for Public Services, Adult Services Department Head, Youth Services Department Head or Assistant Youth Services Department Head. If the staff member is not sure whether a reference book should be loaned or not, contact one of the above managers.

Materials from Desk Reference, Book Indexes, the Business Table or other frequently used, expensive or difficult to replace materials should not be signed out. Current encyclopedias and bound volumes of periodicals are included in this category.

Each request should be treated as a new situation. Exceptions to the basic policy may be made for the following materials, which may be signed out for a more lengthy period:

Earlier editions of reference books -- one week loan  
Circulating Illinois Documents -- three week loan

Note: Illinois Documents that are bar-coded and not marked "REF" may be checked out at the Circulation Desk. All circulating Illinois Documents without bar-codes must be checked out at the Reference Desk.

## **XI. Special Collections**

*Employment Resource Center*-- The ERC is a special collection of Reference and Circulating books, and AV materials. The collection includes a selection of business directories, career books, books on resumes, interviewing, job search strategies and small business management.

All Reference Librarians are trained and expected to do a thorough reference interview for job seekers, orient users to resources in all areas covered by ERC and assist in their use, and provide referrals to appropriate agencies and associations.

When a Reference Librarian has provided a patron with basic ERC assistance and has determined that specialized services are needed, and if the patron is interested, s/he should refer patron to the Career Librarian. The most efficient way to refer patrons to the Career Librarian is to take patron's name and telephone number and leave it for him, or to have the patron call him directly.

For a more complete explanation of the Employment Resource Center see *ERC Guidelines* (Appendix I).

*Illinois Documents Collection*-- The Illinois Documents Depository Collection is housed within the Reference Room.. The Illinois State Library obtains and distributes free of charge Illinois State government publications to each depository library. The collection consists of any document, report, directory, rule, regulation, newsletter, pamphlet, brochure, periodical or other printed material supplied by the Illinois State Library as part of the Illinois Documents Depository Program. Since the function of the collection is to provide access for all Illinois citizens to state government information, the collection is available for patrons to look at in the library and in most cases to check-out, either directly or through interlibrary loan.

Adopted 3/12/97  
Skokie Public Library  
Board of Trustees



**Reference Policy, Standards and Guidelines Appendix F**

**SKOKIE PUBLIC LIBRARY  
TELEFACSIMILE POLICY**

Skokie Public Library routinely utilizes telefacsimile (FAX) transmission as a means of providing and improving services to patrons of Skokie Public Library and to all libraries who agree to provide reciprocal services.

**Introduction**

FAX technology is most frequently used to:

1. Communicate information in response to reference requests.
2. Receive and submit interlibrary loan requests.
3. Receive and deliver articles, documents and correspondence between the Library and its users.
4. For administrative and professional communications between the Library and the professional, business and community worlds.

This document covers general policies for the use of telefacsimile technology in the Library. Procedures and guidelines of a more specific nature may be found in departmental procedure manuals. The policies established in this document should be followed consistently and conscientiously. Questions of interpretation or implementation should be taken to department supervisors.

**Policies**

**I. GENERAL**

- A. All photocopying of materials for the purpose of faxing information must comply with federal copyright law.
- B. The Library's administrative and reference FAX machines are not available for use by the public in sending or receiving FAX transmissions.
- C. The Library's administrative and reference FAX machines may be used only for library-related purposes.
- D. Sources of faxed information should be clearly cited in each transmission.
- E. Materials may not be faxed outside the Greater Chicago area for the fulfillment of an information request under any circumstances without the approval of a supervisor.
- F. All long distance FAX transmissions should be recorded on a long distance call slip and turned in to the Administrative Office for recording in the Long Distance Log Book so that Library phone bills can be accurately audited.

**II. REFERENCE**

Individual Request for Document Delivery

- A. Registered users of Skokie Public Library will be eligible for document delivery via FAX transmission. A registered user of Skokie Public Library is defined as any person or institution with a patron record on the JCPL system. All holders of JCPL cards would be automatically eligible for this service, as would reciprocal borrowers from NSLS institutions who have registered with a JCPL library.

B. Users requesting a document via FAX will be assessed a charge of one dollar plus ten cents per page. The per page cost will not be applied to the INFO-FAX cover page. The librarian sending the FAX will add the special charge to the requester's borrowing record. The charge does not apply to documents supplied via Interlibrary Loan.

C. Requests supplied via FAX for any user during a single business day should not significantly exceed 10 pages of text.

D. Registered users without FAX machines may be offered the delivery of photocopied documents via the U.S. Postal Service. The same fee schedule as FAX delivery will be applied to cover postage and handling expenses.

E. Requests for document delivery via FAX from non-registered callers should be referred to the caller's home library for the initiation of an Interlibrary Loan request.

#### Reference Service to an Individual

F. The use of the FAX machine to provide information in the fulfillment of a patron's reference request should be employed at the librarian's discretion when the use of this technology is deemed to be the most efficient way to transmit complex or tabular information to a remote user. There will be no charge assessed for this service. Information faxed at the librarian's discretion should not exceed two pages of text. More than two pages of data should be considered a document and thus subject to fee.

#### Requests from Other Libraries

G. Materials may be faxed to libraries within the Greater Chicago area at no charge as a professional courtesy. It is assumed that this is a reciprocal agreement among libraries.

### III. INTERLIBRARY LOAN

#### Materials Requested by Other Libraries from Skokie Public Library

A. Interlibrary Loan requests are routinely received via FAX. They are handled by staff as any other Interlibrary Loan requests.

B. Skokie Public Library should respond to requests for periodical articles received via FAX from other libraries within 24 hours.

C. Articles requested to be faxed to fulfill an Interlibrary Loan request should not significantly exceed 10 pages of text.

D. Skokie Public Library will not fax books or texts significantly exceeding 10 pages.

#### Materials Provided to Skokie Patrons

E. Patrons will not be charged for the delivery of documents via Interlibrary Loan. The provision of materials not owned by Skokie Public Library to its users is considered a basic service.

Adopted 7/10/91

Revised January, 1996

BB/CAA:kk