



## **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. KPU Librarians strive to provide excellent services through traditional library-based, in-person reference service, virtual reference (AskAway chat reference) as well as email, text and phone service.

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 who serves as 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 by the University Librarian. The number of hours dedicated to each of the various modes of reference services are planned taking into account a number of factors including, budget, time, course timetables and challenges of operating within a multi-campus environment.

These **Modes of Reference Service** currently include traditional in-person assistance through Research Help Desks located at each campus library, by telephone, email, text, virtual (chat) reference or individual appointments.

Kwantlen library users are primarily registered KPU students, followed by faculty, administrators, staff and alumni. Librarians also assist students from other institutions and members from the community at large. Occasionally 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 literacy skills that encourage 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), and the 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** 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

### *Modes of Reference Service Delivery*

- **Research Help Desk.** The Research Help Desk is a recognizable, visible, point of reference service. The majority of reference service hours are allocated to the 4 campus library Research Help Desks. Hours are allocated primarily based on usage statistics including gate counts and reference statistics, student populations at each campus, and course timetables. The Surrey Campus Library Research Help Desk has the greatest number of service hours, with the fewest hours found at Cloverdale Campus. Research Help Desk schedules are set annually, in advance of the academic year.
- **Email & Text.** In an effort to consolidate and answer queries in a timely manner, emails are sent to a generic “Ask a Librarian” account. Emails and texts are answered by Librarians providing in-person reference services at the Langley & Richmond Campuses from Monday – Friday and the librarian at Surrey on weekends.
- **Virtual Chat reference - AskAway.** KPU librarians contribute hours to the provincial AskAway Virtual Chat Reference Service. The librarian who coordinates Kwantlen's AskAway service develops a schedule with the provincial liaison. These hours are noted on the Reference Schedule. Kwantlen librarians at Richmond and Langley also monitor the KPU AskAway queue Monday-Thursday while providing in-person reference services.
- **Phone Reference.** Because a librarian is not scheduled on the Research Help desk during all library open hours, the phone numbers provided on our website for reference help direct callers to the Service Desks at each campus library. Staff are able to answer directional questions and forward any reference related queries to the appropriate Research Help Desk or librarian. For phone requests requiring research assistance when no librarian is available in person, staff will refer callers to email and chat reference options.
- **By appointment.** When necessary or appropriate for the nature of the research question, librarians may provide specialized assistance through individually scheduled office appointments.

### **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.

Priority for service, where practical, will be given to users appearing in person, rather than to questions via telephone, email, chat or text.

### **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 done within a reasonable amount of time. Where a request cannot be accommodated please refer users, as appropriate, to the Accessibility Services 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 the Richmond, Surrey and Langley campus libraries. Librarians are not expected to teach users how to use this software. Students requiring assistance should be referred to the Accessibility Advisor at their campus. A print enlarger is available at Langley, Richmond and Surrey campus libraries. Access to adaptive technology equipment is prearranged through the Accessibility 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 IT Helpdesk for assistance. Librarians are not expected to troubleshoot 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 IT Helpdesk or their instructor.

### **Visibility of Reference Services**

Reference service points should be highly visible and easy to identify. Librarians should be readily identifiable and appear approachable. Reference Service hours and locations should be widely advertised and readily accessible by the KPU 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 (<http://www.kpu.ca/library/services/LibraryProcedures>).

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 KPU website (<http://www.kpu.ca/governance>).

Additionally, the Library looks to 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 Research Help Desks it is the responsibility of the librarian at the desk to consistently and accurately record statistics for any assistance provided in-person or by phone. Librarians record statistics as part of the response process in the email and text reference module. AskAway statistics are also recorded as part of the response process in chat reference and are made available to all the participating institutions. Librarians are also expected to record statistics for individual research assistance appointments or if they are called from their offices to provide research help outside the regular Research Help Desk operational hours. These various statistics are monitored, gathered and analyzed by the Reference Services Coordinator.

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

## **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.

Reviewed and revised: April 2019