**ALA Guidelines for Behavioral Performance of Reference Service Providers**

**Approachability:** Patrons must be able to identify that a reference librarian is available to provide assistance and also must feel comfortable going to that person for help

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|  | Accomplished | N/A |
| Establishes a “reference presence” wherever patrons look for it; highly visible location for Reference Services with proper signage about coverage/hours/help |  |  |
| Is poised and ready to engage approaching patrons; Librarian is aware of the need to stop other activities when patron approaches |  |  |
| Employs a system of question triage to identify what types of questions the patrons have when more than 1 patron is waiting;  |  |  |
| Establishes eye contact with patrons and uses attentive and welcoming body language |  |  |
| Acknowledges patron through friendly greeting to initiate conversation or by standing up and moving forward towards patron |  |  |
| Roves through the library offering assistance when possible; Librarians going to the point-of-need  |  |  |
| Be mobile: get patrons started on initial research and move to other patrons |  |  |
| Approach patrons with assisting lines “are you finding what you need?” “Can I help you with anything?” etc. |  |  |
| Check back on patron’s progress |  |  |

**Comments:**

**Interest:** Librarian must demonstrate a high degree of interest in the reference transaction and should be committed to providing the most effective assistance.

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|  | Accomplished | N/A |
| Focuses on and Faces the patron when speaking and listening |  |  |
| Maintains or re-establishes eye contact throughout transaction |  |  |
| Signals an understanding of patrons’ needs through verbal or non-verbal confirmation |  |  |
| **(Virtual/on-line)** Maintains or re-establishes “word Contact” with patron by sending written or prepared prompts to convey interest in patron’s question |  |  |
| **(Virtual/on-line)** Acknowledges user email questions in timely manner |  |  |

**Comments:**

**Listening/Inquiring:** Librarian must be effective in identifying the patron’s information needs and must do so in a manner that keeps the patron at ease. Strong listening and questioning skills are necessary to be a good communicator.

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|  | Accomplished | N/A |
| Communicates in a receptive, cordial, encouraging manner |  |  |
| Uses a tone of voice or written language appropriate to the nature of the transaction |  |  |
| Allows patrons to state fully their information need in their own words before responding |  |  |
| Identifies the goals or objectives of the user’s research |  |  |
| Rephrases the question or request and asks for confirmation to ensure that it is understood |  |  |
| Seeks to clarify confusing terminology and avoids excessive jargon |  |  |
| Uses open-ended questioning techniques to encourage patron to expand on the request or provide more information |  |  |
| Uses closed/clarifying questions to refine search query |  |  |
| Maintains objectivity and does not interject value judgments about subject matter or nature of transaction |  |  |
| **(Virtual/on-line)** uses reference interview or web forms to gather as much information as possible without compromising user privacy |  |  |

**Comments:**

**Searching:** Portion of the process where behavior and accuracy intersect.

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|  | Accomplished | N/A |
| Finds out what patrons have already tried and encourages patrons to contribute ideas |  |  |
| Constructs a competent and complete search strategy involving: *selecting search terms, identifying sources appropriate to the patron’s need*  |  |  |
| Explains search strategy and sequence to patron as well as sources to be used |  |  |
| Attempts to conduct the search within the patron’s allotted time frame |  |  |
| Explains how to use sources when appropriate |  |  |
| Works with patron to narrow or broaden the topic |  |  |
| Recognizes when to refer patrons to a more appropriate guide, database, resource, etc. |  |  |
| Offers pointers, detailed search paths, or names of resources used to find answers |  |  |
| **(Virtual/on-line)** Uses appropriate technology (co-browsing, screen captures, scanning, email, etc.) to help guide patron through library resources |  |  |

**Comments:**

**Follow-up:** Librarian is responsible for determining if the patron is satisfied with the results of the search and also responsible for referring patron to other sources if needed.

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|  | Accomplished | N/A |
| Asks patron if their question has been completely answered |  |  |
| Encourages patron to return if they have further questions |  |  |
| Consults other librarians or experts when additional subject expertise is needed |  |  |
| Makes patron aware of other appropriate reference services (chat, email, etc.) |  |  |
| Makes arrangements, when appropriate, with patron to research a question even after the transaction is done |  |  |
| Refers patron to other sources if the query cannot be answered to the satisfaction of the patron |  |  |
| Takes care not to end the transaction prematurely |  |  |
| **(Virtual/on-line)** suggest the patron visit or call the library when appropriate |  |  |

**Comments:**