

2.7 Reference Service Policy

The following guidelines should be used by Reference Department staff in providing answers and materials for ready-reference and general research questions taken in person, by telephone, by mail, or submitted electronically.

The primary role of the Reference Staff is to assist patrons with their information searches and to educate them in the location and use of all types of reference resources. To be able to assist as many patrons as possible, the Reference Staff may need to limit the time and resources provided to any individual patron. Questions or assistance requiring more than 15 minutes at one time may need to be addressed by scheduling a “one-on-one” appointment through the library’s scheduling process. Reference staff will provide assistance to patrons but are not able to do or complete work for a patron. Patrons are not permitted to purchase dedicated staff time for reference or research services.

Confidentiality

All reference transactions should be treated with confidentiality, and the patron’s right to privacy must be ensured. Library staff will not handle identifying or sensitive personal information like Social Security numbers, banking information, medical information, etc. All information requests should be discussed only in a professional manner.

Timeliness

Patrons of all ages will be provided with correct answers or referrals to their reference requests as soon as possible. If an answer cannot be provided within twenty-four hours, the patron will be informed of the status of their request.

While priority is given to walk-in patrons, telephone and electronic requests will be answered as quickly as possible. If “same day” service cannot be provided, the patron will be informed. Library staff will schedule “one-on-one” reference appointments when staffing allows.

Locating Materials and Resources

Whenever possible, answers will first be sought using the resources available within the Chelmsford Library, whether print or electronic. The Reference Staff will also use the resources available through the Merrimack Valley Library Consortium (MVLC), the Massachusetts Library System (MLS), the OCLC WorldCat catalog, and other library-vetted sources.

If an answer cannot be provided immediately using local resources, appropriate print or electronic materials will be requested on the patron’s behalf.

Every effort will be made to provide patrons with a source for an answer, where appropriate. If a patron is unable to visit the library, the staff should offer to mail, fax, email, or text a copy of the material or a bibliography of the resources used (reproduction and/or shipping costs may apply).

Loaning of Reference Materials

Reference and Historical Collection materials will not leave the building. Materials in these areas are important for ready access to patrons and may include irreplaceable Local History items. Patrons are provided the opportunity to photocopy any items that will not be damaged by duplication.

Types of Questions

The Reference Staff strives to provide professional and complete answers to any type of question asked at the Reference Desk. In addition to general reference questions, the following types of questions receive special treatment:

- **Directory Information**

Reference Staff will assist patrons searching for names, addresses, or other contact information in any publicly available resource, including local directories, and electronic resources.

- **Homework Assignments**

The use of the library for homework and research assignments is part of the educational process, and staff should strive to provide students with a positive library experience. Questions from students should be answered in the same manner as other informational requests, and additional time should be given to provide the student with informal bibliographic instruction and research techniques. Reference staff will aid students but are not able to do or complete work for them.

- **Technology Questions**

All Reference Staff will be proficient with the technology resources available within the library and have the skills and training to assist with electronic research resources and basic computer, internet and personal device competencies. Technology questions beyond the scope of regular Library resources may be referred to the Head of Reference or the Library's Technology Manager.

- **Medical/Legal/Financial Information**

Medical, legal, tax and investing assistance is limited to directing patrons to Library resources and/or secondary referral sources such as local hospital libraries, law libraries, etc. Reference staff cannot, at any time, assist with the interpretation of medical, legal or financial information, or give patrons advice on these topics. While staff may offer assistance in the technical aspects of accessing or completing a form, they will not fill in a form with the patron's personal information. Tax forms will be available when distributed by the state of Massachusetts or the Federal Government.

Adopted, Board of Library Trustees, June 2016

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