Guidelines for Business Information Responses

Introduction

This sixth revision of the Guidelines for Business Information Responses is designed to assist information services staff in meeting user needs to resolve business information inquiries, as developed by members of the American Library Association. [1]

Serving as an enhancement to other Reference and User Services Association publications, including Definitions of Reference, Guidelines for Behavioral Performance of Reference and Information Service Providers, Professional Competencies for Reference and User Services Librarians, and Guidelines for Implementing and Maintaining Virtual Reference Services, the following issues and perspectives specific to business information responses are addressed:

1. Role of the Information Services Staff

2. Sources

3. Information Service Responses for Off-Site Users

4. Ethics and Copyright

1.0 Role of the Information Services Staff

1.1 Ensure the information services staff has the knowledge and preparation appropriate to meet the routine business information needs of the library's clientele, and/or is trained in the appropriate referral techniques and made aware of reliable alternative resources for business information questions (for referral guidelines, see Sections 2.12-2.16).

1.2 Encourage staff members to keep current in subject areas and refer questions beyond their level of competency.

1.3 Develop written policy regarding the provision of specialized information related to business questions. Disclaimers should clarify the role of the information specialist as someone who provides resource referrals and research guidance but not specific business advice or recommendations. The level of assistance and interpretation provided to the user should reflect the differing degrees of subject expertise between the specialists and non-specialists.

1.4 Make clear to the user the staff members' roles in answering business questions, as stated in the library's specialized information services policy.

1.5 Provide complete and accurate responses to a library user's questions when possible and guide the user to the most appropriate resources for their information needs, in accordance with the policy on specialized queries.

1.6 Provide instruction in the use of the sources, enabling the user interested in this approach to pursue information independently and effectively.

1.7 Find an alternative source for further explanation and/or for comparison if a user has trouble understanding a source. If no appropriate alternative source can be identified, a referral should be made.

1.8 Provide accurate sources in hand or clear and concise referrals to obtainable sources and/or services located elsewhere to satisfy the user's need for information.

Advice

1.9 Advise the user regarding the relative merits of sources and differences in source content, including acknowledgement of appropriate media or format as required, and make recommendations regarding library materials when appropriate.

1.10 Recommend materials that are the most comprehensive in scope and content and which best fits the timeframe of the information need.

Confidentiality

1.11 Respect the confidentiality of a user's request, both in-person and off-site, at all times.

1.12 Respect the user's privacy by not discussing queries within or outside of the library except when seeking assistance with that information query, and always ask the user for permission before seeking outside assistance. The user's name should never be mentioned without the user's consent.

Tact

1.13 Use discretion during the reference interview and in any follow-up. While it is important to conduct a thorough interview, this should be done in such a way as to minimize any discomfort to the user.

1.14 Identify the issue in question without intruding on the user's privacy.

1.15 Be impartial and nonjudgmental in handling a user's query.

2.0 Sources

2.1 Evaluate and acquire appropriate business subject sources that are current, accurate, informative, and accessible in order to meet the needs of the community served.

2.2 Give the user full access to information available in library collections within the parameters of the library's mission, copyright and licensing agreements. Information should not be withheld from a user unless the use of a resource providing that information violates a licensing agreement.

2.3 Direct the user to sources that may contain the information that they require. These sources may include in-house print and non-print collections, as well as access to external resources.

2.4 Provide aids that assist the user and the information services staff in identifying, accessing, using, and evaluating relevant sources.

Currency of Sources

2.5 Provide the most current information possible, consistent with the needs of the library's primary clientele and within the limitations of the library's materials budget and collection development policy.

2.6 Evaluate user guides periodically to remove references to dated materials and add in relevant content and sources.

2.7 Weed reference collections to withdraw dated materials or transfer selected dated materials to the general collections. Add new sources within the scope of the collection.

2.8 Emphasize the currency of publication dates when the information is of a time-sensitive nature.

2.9 Advise the user when there may be more current information available elsewhere on the topic.

Accuracy of Sources

2.10 Assist the user in assessing the accuracy of information by providing alternate sources for comparison or explanation whenever possible.

2.11 Assist the user, whenever possible, in differentiating between information content and advertisements or solicitations, in cases where there may be any misinterpretation.

Referrals to Other Sources

2.12 Answer the user's inquiries in accordance with local information services, collection development, and instructional policies.

2.13 Refer a query to individuals and/or to published sources in a variety of formats if that query cannot be answered using sources and personnel available within the library.

2.14 Make referrals to other sources only if the agency, service, or individual will extend its services to that user.

2.15 Maintain awareness of community, state, and private services outside of the library and ensure that referrals to services follow any protocols in effect.

2.16 Do not make recommendations to specific commercial service providers or business professionals, but rather provide access to other information or information sources that may help the user identify and locate the services.

3.0 Information Service Responses to Off-Site Users [2]

3.1 Handle all requests for assistance not made in-person (including voicemail and e-mail) with special care, since it is easy to misinterpret messages without the benefit of an in-person reference interview. This may also apply to other text-based communications such as chat or instant messaging (IM), since these technologies can lead to less-than-thorough reference interviews due to the slowness of texting responses in real time and the resulting tendency of the participants to keep their exchanges short.

3.2 Develop information services policies that include provisions for off-site requests.

3.3 For information requests that cannot be relayed over the telephone or online, inform the user about what information the library does have on the topic, and that they will need to visit the library to use in-house print and non-print materials and to receive further research assistance.

4.0 Ethics and Copyright

4.1 Adhere to the American Library Association's current Code of Ethics (as stated in the ALA Policy Manual and the ALA Handbook of Organization), which govern the conduct of all staff in the provision of information services.

4.2 Comply with the American Library Association's statements on Copyright and Fair Use in the proper usage and reproduction of information and information resources.

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[1] Originally prepared in 1992 by the Standards and Guidelines Committee, Reference and Adult Services Division, American Library Association as "Guidelines for Medical, Legal and Business Responses." Revised and updated by the Business Reference and Services Section (BRASS), Reference and User Services Association in 2000, 2001, 2007, 2008, and 2012. Approved by the RUSA Board of Directors, May 28, 2013. Revised and updated by BRASS in [January 2022; insert once approved].

[2] Off-site users include both affiliated and non-affiliated users requesting assistance from remote locations.

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