**DEPARTMENT OF EDUCATION**

# Minnesota Public Library Report, Reference Transactions

Reference transactions in public libraries include a range of interactions between library staff and customers. Reference is both an art and a science and is practiced by professionals with training and/or experience in using library resources to satisfy customer queries.

Customers need and expect expert assistance with discovering, navigating and using resources in library collections as well as professional consultation about reading, listening and viewing choices that satisfy their preferences for learning and enjoyment.

Reference service is a traditional performance measure for public libraries. Reference transactions is a required data element for the annual Public Libraries in the United States Survey issued by the Institute of Museum and Library Services and is included in the Minnesota Public Library Report. Reference transaction statistics are used by libraries and policy-makers for local, regional, state and national library service and staffing planning.

## Definition

The data element appears in the Minnesota Public Library Report in the Public Service Information section.

**\*P07/P07m) Reference Transactions**

Enter the number of reference transactions during the year. A reference transaction is a patron contact with library staff that involves the knowledge, use, recommendation, interpretation and/or instruction in the use of one or more information sources. Information sources include print and non-print materials, online databases, catalogs and other holdings records. It also includes communication or referral with other libraries, institutions and people inside and outside the library. The request may come in person from an adult, young adult or child by phone, mail, e-mail, online, or other means. A reference transaction includes readers' advisory and individual instruction and assistance in using information sources. Include both on-demand and scheduled reference transactions.

Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements. Do not include directional questions or questions about library rules or policies. Examples of directional questions are "Where are the children's books?" and "I'm looking for a book with the call number 811.2 G25." An example of a rule or policy question is "How late are you open?"

# Examples

Reference transactions include the following types of information requests.

- Author/title—requests to locate or reserve a specific title or the works of a specific author (in-library or via interlibrary loan)
- General subject—requests for nonfiction subjects or fiction titles for information
- Readers' advisory—requests for fiction or nonfiction subjects in any format for personal enjoyment
- Local studies—requests for information, photographs, maps, books, newspapers, journals, or other materials associated with the library's service area
- Genealogy—requests for assistance with finding genealogical or family history information
- Community information—requests about or referral to community services, programs, activities or facilities
- Literacy/ESL—requests for material for learning English
- Non-English languages—requests for books, newspapers or other material in a language other than English
- Technology instruction—requests for help on how to search the internet, download information or media from library or internet resources, submit online forms or registrations, use email, word processing or spreadsheets, or scan documents or graphics
- One-on-one assistance related to passive programming

Information requests usually involve the use of one or more of the following resources or tools.

- Library catalogues
- Indexes
- Print materials
- Audiovisual materials
- Microforms
- Electronic materials (downloadable media)
- Electronic collections (databases)
- Internet websites
- Social media platforms
- Communication with or referral to other libraries, institutions or people (internal or external to the library)
- Technology such as the internet, apps and ebook readers

Reference transactions *do not include* the following types of interactions.

**Administrative requests**

- Customer registration or library card replacement
- Circulation transactions (holds, loans and returns)
- Reserving space for events, meetings or independent study
- Explaining library policies and procedures

**Directional requests**

- Directions to library facilities (Where is the photocopier?)
- Directions to library resources (Where are the books on poetry?)

**Technical assistance**

- Troubleshooting library equipment, computer hardware or software (removing a copier paper jam, rebooting a computer or reserving public computer time)

Do not count administrative, directional or technical assistance transactions as reference service.

# How to collect the data

Count all reference transactions with individuals of any age conducted in-person, online, over the phone, or by mail. Include transactions conducted in the library or in a location other than the library such as a school or community event. Count every enquiry, not just every customer.

Reference transactions can be collected by an *actual count* or estimated through *sampling*. Sampling is considered as statistically precise as an actual count.

An actual count is typically recorded by making a hash mark for each reference transaction on a daily or weekly tally sheet.

If you sample, please consider using one of these sampling methods. Statistical integrity improves when libraries use similar methods and time periods.

- Estimate by counting public service activity during a typical week in April or October and multiplying the count by 52.

- Estimate by counting public service activity during one typical week in April and another in October; add these numbers and multiply by 26.

- Estimate by counting public service activity quarterly during one typical week in February, May, July and November; add these numbers and multiply by 13.

A *typical week* is a time that is neither unusually busy nor unusually slow. Avoid holiday weeks, vacation periods for key staff, or days when extraordinary events are taking place in the community or the library. Choose a week in which the library is open its regular hours. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open).

If the library does not track reference transactions, check **n.c**. ☐. (not counted box) for *P07m) Reference Transactions. Do not report inaccurate data. Only report valid data from an actual count or sampling.

If you have questions or concerns, please contact Joe Manion, State Data Coordinator, at 651-582-8640 or joe.manion@state.mn.us.