

Reference Referral Policy

Audience

This document details how to make referrals at all levels of reference experience and training. It is intended for use by anyone participating in reference services through any format (in-person, online chat, email, phone, etc.).

Definition

A referral occurs when one person answering a patron's question brings others in to help with the answer. Referrals can happen in all formats of reference. Referrals include:

- One person sending a question/patron to another for additional help and expertise, and ceasing their own work on the question;
- Multiple reference personnel passing a question back and forth, with each contributing based on their expertise/knowledge of different aspects of the question.

A referral is a collegial way to meet a patron's information needs most effectively. Patrons ask a variety of interdisciplinary questions, and the University of Illinois library system has a wealth of expertise to help our users. A referral does not represent a failure on the part of an individual to adequately answer a question but is rather another tool that will help get the best answer to each question.

When to refer

The purpose of a reference referral is to have questions answered by the person most knowledgeable in the subject area. Referrals should normally occur when:

- The patron has a specific, non-trivial information need;
- or
- The initial answerer feels that additional specialized assistance would benefit the patron.

Criteria to consider:

- Are there specific policies for answering this type of question?
- Can I provide the most complete answer to this question using widely-available reference sources?
- I have not found that we have access to the resource the patron is looking for. Rather than telling the patron definitively "we don't have that" – might a referral to the subject specialist be more helpful and ensure that I haven't missed something? [This also helps to alert the subject specialist that there is a collection need so they can decide if the content should be purchased for the collection.]

- Could a subject specialist answer this question more efficiently? (Will this question take longer than 10-15 minutes for me to find the answer?)
- Will the patron be better served by a subject specialist for the discipline of this question?
 - Am I familiar with the advanced research resources for this discipline?
 - Is the patron working on a long or detailed project (e.g., 10+ page paper, undergraduate or graduate thesis, dissertation, independent study, etc.)?
 - Is the patron working on a highly specialized topic, or one that requires detailed knowledge of discipline-specific language?
 - Does the question involve special formats or specific collections (e.g., film, music recordings and scores, rare books, archives, patents, statistics, etc.)?
 - Is the patron asking for a resource or publication to be added to the collection or asking about a resource that has been canceled?
- Will there be a subject specialist available within the time frame required by the patron to have the question answered?

Always provide patrons with the [name and contact information for the subject specialist \(or specialists\)](#) relevant to their topic and explain that they can provide additional, in-depth research assistance.

Questions are most commonly referred to:

- The subject or functional specialist (there are often multiple individuals who can help answer a question; check the [subject specialists list](#) and the staff directory);
- Libraries or units (this is a good choice if you cannot determine the appropriate subject/functional specialist).

How to refer

When answering the question in person or by phone:

- Always check with a specialist or library/unit before sending a patron to them. If the specialist is not available, try contacting the library/unit in case there are others there who are available to assist.
- Many specialists have LibCal enabled so that patrons can see when they are available for consultation (this will show on the subject specialists list and the staff directory).
- If the question comes by phone and neither the specialist or unit is available, ask the patron if they would like to be transferred so that they can leave a voicemail message.
- Give the [specialist's contact information](#) to the patron.

When answering via email:

- Reply to the patron, letting them know who you are referring the question to and include the specialist or library/unit on the message.
- Include details of any steps you have already taken to find the answer.

When answering via chat:

- If someone from the library/unit relevant to the question topic is on chat, message them to ask if you can transfer the patron.
- If no one with related expertise is on chat, provide the patron with any relevant information you find and give them the contact information for the specialist or library/unit.

Receiving Referrals

When you receive a referral, it is important to communicate promptly to keep the patron informed and to ensure it is clear who is working on the question.

- When accepting a referral, reply directly to the patron with an acknowledgement within 24 hours. If possible, provide your best estimate for how long it will take to supply the answer.
- When relevant, confirm to the person who referred the question that you have received it and are working on it.
- If you must forward the patron's question to yet another library/unit or specialist, notify the patron that they are being referred, to whom, and why.