# Reference Transactions

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Public Instruction
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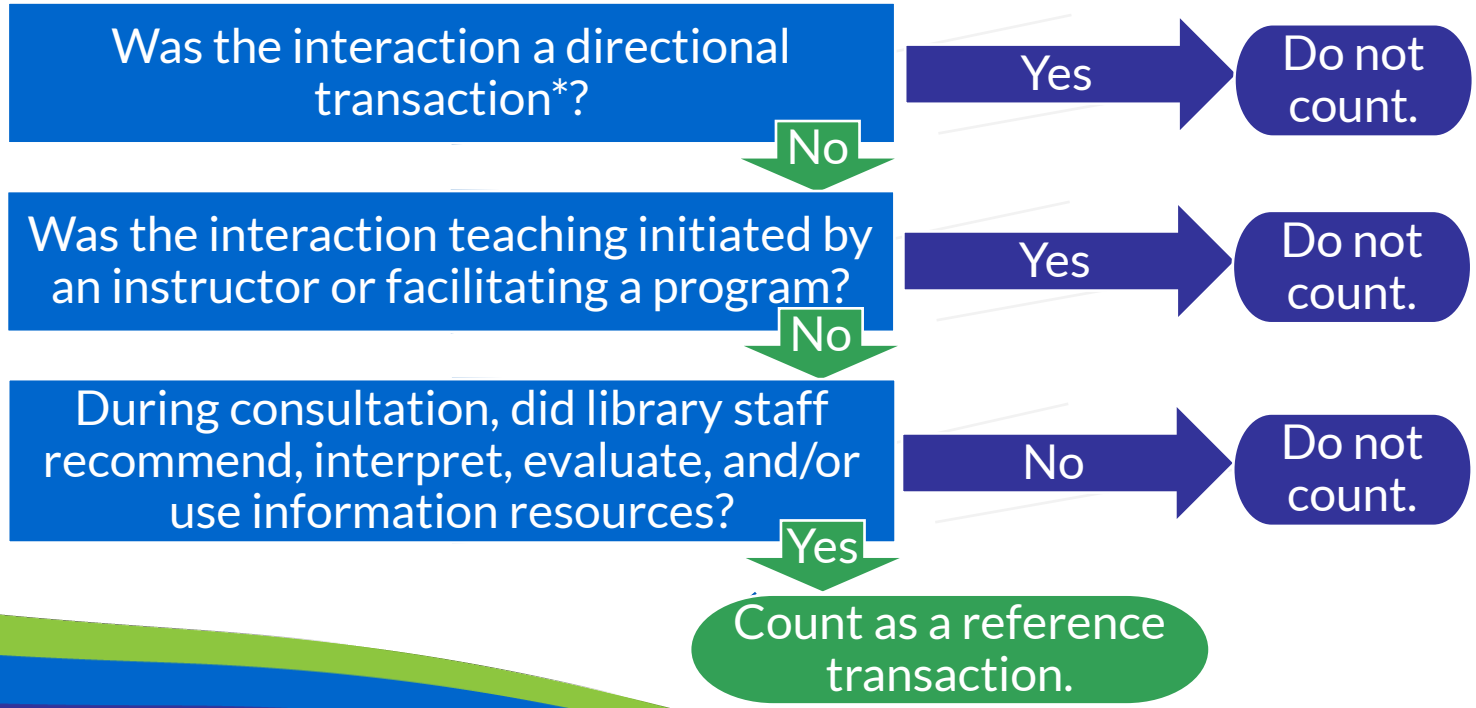
# Reference Transactions



# Reference Transaction Examples

| Help a patron… | Directional | Formal Instruction | Information Consultation |
|---|---|---|---|
| Use BadgerLink to find a magazine article | N | N | Y |
| Perform a web search for instructions to connect to a WIFI printer | N | N | Y |
| Provide IT help for a device or software issue via phone or chat | N | N | Y |
| Walk through the city website | N | N | Y |
| Find books related to a patron's interest | N | N | Y |

# Not a Reference Transaction

| Help a patron… | Directional | Formal Instruction | Information Consultation |
|---|---|---|---|
| Make a photocopy | **Y** | N | **N** |
| Find the youth librarian | **Y** | N | **N** |
| Place a hold on an item | N | N | **N** |
| Register for an upcoming event | N | N | **N** |
| As an on-site proctor for a virtual course | N | **Y** | **N** |
| With a question during a program | N | **Y** | Y |

One or more of the following is true: the question is directional, formal instruction is provided, or the interaction is not an information consultation.

# IMLS Reference Transactions

The following excerpts are from the IMLS definition for Reference Transactions in the Public Libraries Survey.

*Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs.*

*A reference transaction includes information and referral service, scheduled and unscheduled individual instruction and assistance in using information sources (including websites and computer-assisted instruction).*

*Count Readers Advisory questions as reference transactions.*

# IMLS Reference Transactions cont.

*Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements.*

*Do not include transactions that include only a directional service, such as instruction for locating staff, library users, or physical features within the library.*

In addition, Wisconsin provides guidance that reference transactions may be counted regardless of the communication method. For example, reference transactions which occur in phone conversations, email, and on-line chat should be included.