# SOP Template: Reference and Information Services Workflow

This SOP defines the **Reference and Information Services Workflow**, detailing the systematic process for assisting patrons with research inquiries, accessing information resources, and providing accurate, timely support. It covers request intake, information retrieval, resource evaluation, user guidance, documentation, and follow-up procedures to enhance user satisfaction and ensure efficient, reliable service delivery in libraries or information centers.

## 1. Purpose

To ensure consistent, efficient, and effective delivery of reference and information services to all patrons, resulting in high-quality support and improved user satisfaction.

## 2. Scope

This SOP applies to all staff involved in providing reference and information services at the library or information center, across all service points (in person, online, and via phone).

## 3. Responsibilities

- **Reference Staff:** Address patron inquiries, adhere to the workflow, and document transactions.
- **Supervisors/Managers:** Oversee implementation and review workflow efficacy.

## 4. Workflow Steps

1. **Request Intake**
   - Greet patron and identify their information need.
   - Clarify the request using active listening and reference interview techniques.
   - Record request details in the reference transaction log or management system.
2. **Information Retrieval**
   - Select appropriate search strategies and resources (catalogs, databases, print materials, online sources, etc.).
   - Conduct searches systematically and efficiently.
3. **Evaluation of Information**
   - Assess relevance, accuracy, authority, and timeliness of located information.
   - Prioritize sources based on the patron's needs.
4. **User Guidance & Instruction**
   - Deliver information clearly and concisely to the patron.
   - Provide instruction on how to access and use resources.
   - Offer additional assistance if needed (e.g., citation guidance, advanced search techniques).
5. **Documentation**
   - Log the completed transaction as required.
   - Note resources recommended, outcomes, and any follow-up actions needed.
6. **Follow-up**
   - Check back with patron, if appropriate, to ensure their needs are met.
   - Document any feedback, further requests, or unresolved issues.

## 5. Documentation & Record Keeping

- Use the official transaction log or management system for all reference inquiries.
- Maintain confidentiality and privacy in all records.

## 6. Quality Assurance & Review

- Supervisors should periodically review reference interactions for consistency and quality.
- Solicit and evaluate patron feedback to inform service improvements.

## 7. References

- Institutional policies and procedures documentation.
- ALA Reference and User Services Association (RUSA) Guidelines.
- Relevant legal and ethical standards.

## 8. Revision History

| Version | Date | Description | Author/Editor |
|---------|------|-------------|---------------|
| 1.0 | 2024-06-20 | Initial creation | [Your Name or Team] |