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Librarian

Introduction to
REFERENCE WORK

BY

MARGARET HUTCHINS

Assistant Professor

SCHOOL OF LIBRARY SERVICE

COLUMBIA UNIVERSITY

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To

FRANCES SIMPSON AND ISADORE GILBERT MUDGE

Reference Librarians and Teachers

THIS BOOK IS DEDICATED IN GRATI-
TUDE BY ONE OF THEIR PUPILS

Preface

This book aims to describe and interpret reference work as the reference librarian sees it for the information of administrators of libraries and other librarians and library school students. The writer has tried to share with others what has been gained from thirty-five years' devotion to the subject, two thirds of which were spent in actual practice of reference work in university and public libraries, and all of which have been filled with observing it, reading about it, listening to others talk about it, and thinking about it. Humbly, she hopes that she has voiced the ideas of all reference librarians so far as a single one can do that, saying, as it were: "This is what we reference librarians call reference work, this is what we are trying to do, this is the way we believe it should be done. We think it's the most interesting work in the world! Please try to understand and help us in doing it the right way."

Although the book covers the same field as the previous American Library Association publication on *Reference Work*, written by James I. Wyer, it is not a revision of that work. Fifteen years ago a survey of reference work in libraries was made in preparation for Wyer's book. This has not been repeated for the present book. Neither have any research studies been instituted for the purpose of providing material for it. It therefore does not pretend to contribute any facts previously unknown to most experienced reference librarians.

Because it is an attempt to interpret the essence of reference work in its universal aspects, it deals more with the principles and methods of reference work in general than with routines and practices of individual libraries or even types of libraries. As books on libraries in special fields of knowledge are being published in increasing numbers it is expected that they will deal adequately with the problems of reference service that are peculiar to those subjects. Therefore that aspect of reference work is intentionally slighted here.

Moreover, following the precedent of the book by Wyer, information on individual reference works is omitted since that is already covered by Mudge's *Guide to Reference Books* and its supplements, Shores' *Basic Reference Books*, Hirshberg's *Subject Guide to Reference Books*, and similar works. As illustrations, here and there, mention is made of certain reference books. It has not been deemed necessary to give full bibliographical citations for those that are listed in the well-known bibliographies mentioned.

To all librarians and library school teachers who studied and commented on the outlines for this book, to all librarians who have granted the hospitality of

their libraries, and to all reference librarians who have generously shared their experiences and ideas with me, I wish to express my appreciation. For reading and helpfully criticizing parts of the book as it was being written, I am grateful to Isabella K. Rhodes, Alice I. Bryan and Miriam D. Tompkins of the Faculty of Library Service, Columbia University, Violet A. Cabeen of the documents division of the Columbia University Library, and Winifred Ver Nooy, reference librarian of the University of Chicago. Above all, I wish to thank the American Library Association and Columbia University, the first for giving me the invitation and the second for allowing me the time to put into writing the record of a reference librarian's experiences and ideals of reference work.

MARGARET HUTCHINS

New York City

June 23, 1943

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By Way of Introduction

NOTE: Although it is a reprehensible habit, especially for reference librarians, to skip the introduction of a book, it is recommended that the sophisticated reader skip this one, which is, indeed, simple, frivolous and, some think, out of keeping with the serious purpose of the book. It is a recollection of experiences and observations of the writer and her friends, with the addition of a few reference questions recorded by various librarians, which wrote itself into an artless story. Its aim is to show by concrete examples that, first, there is more to reference work than meets the eye of the casual observer, and second, there is more in common in the reference work of all kinds and sizes of libraries than the librarian of limited experience is prone to believe.

The opening of the university was ten days off when Marcia Fiske, refreshed by two months of mountain climbing after a hard year's grind in library school, started her professional career as a reference assistant in the university library. She had wondered what "they" would have for her to do before people came back from their vacations and began asking her reference questions, but she soon found that there was plenty to occupy her in spite of the dearth of inquirers. Her first task was to study the library staff manual and the reference department's own routines and records: the plan of the reference room, the author list and shelf list of reference books, the charges for books at the bindery, the file of deferred questions waiting for their inquirers to call for them, the interlibrary loans records, the subject index to bibliographies and debate material and other indexes compiled by the department, the list of subject headings for the vertical file, the list of periodicals. Then she tried to fix in her mind the aids kept at the information desk and instructions on what kinds of questions were to be answered there and what were to be referred to the reference desk.

The first actual work she did was to help in taking an inventory of the reference collections. "That's one of the best ways of becoming familiar with the books and the arrangement of the room," she was told. After the shelves had been read, she was further initiated into the contents and arrangement of the whole library by being sent to the stacks to see if the missing books had gotten shelved there; and then to the shelf list and catalog to see if by chance call numbers had been changed without the reference room records having been revised.

Next she was called on to help the reference assistant who was weeding out the vertical files and assigning subject headings to the new pamphlets that had piled up in the last few weeks while most of the staff were on vacation. Then she was given order cards to fill out for titles that had been checked on a bibliography.

This involved ascertaining or verifying various items such as price and publisher. She was asked what subjects she was interested in and set to work looking over current bibliographies and reviews for books on the theater and drama that she thought might be recommended for purchase for reference use. Her list she had then to check against various files of cards to make sure that the books were not already in the library or on order.

She helped the assistant who was checking in reference books just back from the bindery, to make sure that directions had been followed, and when that was done, she helped put British parliamentary papers in order for binding. She was asked to arrange a bibliography on slips for typing. She helped prepare a problem for the course in the use of the library given by the reference department. One day she was given a list of items wanted on interlibrary loan to check through the library catalog, the union catalog and the union lists of serials. She relabeled shelves in a section where some books had been shifted, and revised the plan and directory at the reference desk in accordance with the changes.

She approached more nearly her ideas of reference work when she was given a letter from a woman upstate who wanted some books on termites, and was instructed to find out what the government had published on the subject. And she felt that she was a full-fledged reference librarian indeed when, taking part in a department-wide search for a quotation wanted by the president of the university, she had the good luck to find it in the book she had been assigned to scan.

Finally the university opened and Marcia sat at the reference desk ready to answer questions. She was not quite sure whether she was glad or sorry that one of the other members of the reference staff was sitting beside her. It made her self-conscious, but what if she were alone and a professor came up and asked her about something she had never heard of? She was relieved, however, that her first question was easy: "Where is the Britannica encyclopedia?" And the second wasn't bad: "Where can I find a life of Rudyard Kipling?" But when she was asked to find out what the "lawful age" referred to in a deposition of March 1770 was, she was glad to have the experienced librarian by her side to turn to for advice.

It was a fortnight later when she was having a turn at the information desk near the catalog that, as she finished pointing out the chemistry laboratory on a map of the campus for a newcomer, she noticed a tall young man standing and looking about him at the top of the stairs between her and the reference room.

John Roberts had climbed the broad marble stairway with mingled feelings of eager anticipation and reluctance. The building was larger and more formal than the library of his Alma Mater and he was sure it would contain books and articles whose titles he had noted in his reading for his master's thesis there and been unable to obtain, but how in thunder was he going to find them in this huge building? Strange libraries were awesome places. He had wandered around in a few of them in his limited travels about the country, but never had tried to make any use of them. However, now that registration was over, classes organized, and his program of work mapped out, there seemed to be a little breathing space in

which he could tackle the task of going on with his research for his Ph.D., which was to be in the same field as his M.A.

At the top of the stairs he paused. Which way to go? To the right, through a wide doorway he saw a large, book-lined room with a counter, behind which sat two or three librarians; to the left, almost the same setup but lacking the books. Straight ahead was another stairway that would take him down to the entrance again and he was tempted to descend it, but on his way across the landing he saw in the room at the left a simple desk with an attractive young woman seated at it, talking with a student, who just then turned away with a smiling "thank you." Evidently she was there to help just such uncertain people as he.

He started toward her but on the way he discovered the card catalog. That was something familiar, though, like everything else, on a larger scale than he was used to. However, the cards in it were just like the printed ones he had fingered back in his small "university" library, and to his joy he found listed in it two or three of the books he was looking for, though others still eluded him. He was standing flipping over card after card in a vain search when he realized that the young woman was standing beside him.

"Can I help you?" she offered somewhat timidly.

He showed her his list of unfound items.

"What have you looked under for this one?" she asked, pointing to the first one. He told her and she suggested that he had better try looking for *Journal of Statistical Research* instead of Howard, since it seemed to be an article in that journal rather than a book by Howard. Then she went through the list with him giving a bit of advice about each one, saying as she left him, "If you don't find them now, come over to the desk and perhaps I'll have some other suggestions."

Following her recommendations he found all but seven and these he took back to her.

"Do you mind if I look these up, too? Maybe you turned over two cards at once," she said.

Of course he doubted this, but following her back to the catalog he was chagrined to find that he had looked for Philipps when he should have looked for Phillips, and had failed to see a card which read "Bulletin of statistics, see Royal statistical society." In the end she had reduced his unfound references to four.

"Do you know where you got these?" she inquired.

When he acknowledged that he did not, she shook her head. "I'm afraid I can't find them right now," she said, "but if you'll take them across to the reference desk," she pointed to the counter in the other room, "probably someone there can find them for you, and if they are not in the library, perhaps they can borrow them for you."

"Thank you, Miss Fiske," he said, pleased with himself that he had noticed and remembered her name on a sign on the desk.

As he turned to leave the room he faced a clock which showed that it was nearly six. So, tucking away his bunch of call slips he hurried off to dinner, postponing further search until another time.

The next afternoon he ran up the library stairway. Casting a glance at the desk on the left he felt some disappointment at seeing a young man seated there, but when he approached the counter which had been pointed out to him as the reference desk he was surprised and pleased to see Miss Fiske.

"I thought you belonged in the other room," he said to her.

"Sometimes I do," she laughed, "and sometimes I'm here. The reference department mans both desks. I suppose you are after those references we couldn't find yesterday. I think we'd better turn those over to Miss Blanchard. She has charge of interlibrary loans and she's a whiz at running down tough ones."

Miss Blanchard gave him some cards to fill out, which embarrassed him by asking the same question that Miss Fiske had asked him the day before: Where was the reference found? "I can't fill out that blank," he said, "I found these in some things I was reading last spring and I don't remember which they were."

"Well," she hesitated, "perhaps I can find them just the same, but it would be easier, you know, if we had some idea of the date, and if you knew in what books you read about them, we'd know they must have been published at least before those were. It's a good idea to make a note of the book you are reading when you take a reference from it. But you call back tomorrow for a report on them."

When he called the following day he found several people ahead of him at the reference desk. He watched Miss Fiske show a boy who asked for a list of references on the last Presidential campaign how to use the *Readers' Guide*, while the young man who had been at the information desk the day before got a folder containing pamphlets and clippings on socialized medicine from a vertical file and handed it to a coed. Nearby, an older woman, whom he took to be the head of the department, was discussing with a professor the problem of furnishing a class of a few hundred students with maps of the transcontinental railways in the 1870's.

The young man turned to him after the girl departed, but before he could speak the telephone rang. Excusing himself, he answered it: "Reference department, Mr. Andrews speaking—yes, Dean Rhodes—whether it is from the *Iliad* or the *Odyssey*? Will you spell that sixth word, please?"

Before he hung up, Miss Fiske returned, flushed, from the periodical indexes. "I nearly got caught that time," she remarked to the librarian who had just finished her conference with the professor. "That was a Library 24 student, trying to get me to do his problem for him. He was one of Miss Blanchard's students, and he picked a time when she wasn't here and a greenhorn like me was."

Jolin remembered noticing in the university catalog the description of a course, open to Freshmen, on the use of the library, and now he wondered if they would let him visit it; but when the head of the department approached him, he had not the nerve to ask and simply murmured that he was sorry to hear that Miss Blanchard was not there as she had told him to call about some books. However, the librarian told him that she would see if Miss Blanchard had left a note for him. Taking his name and consulting a file of slips, she soon gave him the call

numbers of two of the titles he had asked for, which had turned out to be a government publication and a paper in a society's proceedings. She then said that Miss Blanchard had located the other two, one at L.C. and the other at J.C., (whatever those may be, thought John) and she wanted to know whether micro-films would be satisfactory. Seeing his puzzled face, she explained that the Library of Congress would not lend material for students but might sell a reproduction on a film (she held up a small reel to illustrate), which he could read by means of the reading machine in a small room adjoining the reference room. Somewhat mystified at the way in which Miss Blanchard had located these articles in distant libraries and amazed that the library maintained reading machines for the convenience of readers, John indicated that anything the reference department would do for him would be accepted with gratitude. As he was about to leave, he said, "That course in the use of the library ought to be good for fellows from the sticks like me. Why don't you offer one for graduate students?"

"Well, you know, we have thought of it," she replied, "and perhaps we will sometime. There are some seminars in which we do give a few lectures now. Perhaps it's better in graduate work to do it that way, on account of the subject specialization, you know."

In the months that followed John continued to call on the reference department for all sorts of things in addition to his research problems, from help in the choice of a book to give his aunt on her birthday and instructions on how to make a shipshape bibliography to planning his Christmas holiday research trip to the seacoast, with railroad connections, hotel recommendations, diagrams of the streets on which the libraries were located, and notes of introduction to various reference librarians. As a result, on his trip he found that he could walk boldly into any library, university, public, or special, and ask his way to the reference department in confidence that there would be somebody to help him find what he wanted in the library.

Many months later, his dissertation finished, he called at the reference desk to thank them for their assistance to him during his sojourn at the university.

"And what are you going to do now to celebrate your freedom?" asked Miss Fiske. On his reply that he thought he would explore New England, where his grandfather came from, before starting his teaching at one of the high schools in a large city in the fall, she exclaimed, "Then you'd be interested to see our latest exhibit!" and led him to a table display of vacation folders and travel books, which kept him busy for several minutes making notes for his trip.

Six weeks later he was following the twists and turns of the highway down the Connecticut Valley when he was led astray into an enticing byroad running into a narrow valley. At the end he found himself in an enchanting little old village with a name that haunted him. On the way back to the highway it came to him that he had heard his grandfather speak of some name like that as the village which his great-great-grandfather had helped to settle.

"I'll stop at the first library I come to," John said to himself, "and find out whether I am right or not." The first library he saw was on a broad shady street

in a small city. If it had not been for the sign "Public Library" he would have passed it by as just another of those big mansions of the 1890's with which the street was lined.

Inside, although the arrangement and furnishing of the rooms suggested a private home, he found the familiar counter for circulation in the foyer and over the doorway of the room on the left a neat sign "Reference." But when he stepped inside the reference room he found only shelves of reference books in neat array, and empty tables and chairs -- no desk, no reference librarian, no one at all in fact. As he turned to go out, however, he met a librarian, who had left the counter to greet him, and soon he was telling her of his desire to look into the history of the little village. She led him then up the stairway with its old mahogany rail to a large room, telling him that Mrs. Allen who had charge of the local collection would be much interested in finding him all she could on the place and on his family connections with it.

This room seemed much more like the reference rooms he had encountered before than the one downstairs. Several people were seated at the table busily reading and writing; books and pamphlets were scattered around; and the white-haired woman in charge certainly did take an interest in his wants, bringing him town histories, county histories, family histories, and genealogies, all with slips of paper inserted wherever mention was made of the village or of anyone with the names he had given her. Before he knew it, two hours had slipped away, and he and Mrs. Allen were the only ones left in the room.

Chatting with her he learned that the library answered many letters of inquiry about local history and local affairs. One of the most interesting searches she told him about was the attempt to locate an old locomotive, famous in its day, which had been kept in the local roundhouse for some time after it had gone out of service many years before and then had been moved. The search had involved the scanning of old newspapers as well as books, conferences with old residents of the city, and correspondence with railway officials before definite information about its removal to another part of the state and its ultimate destruction in a freight-yard fire was established.

"Well," John said, "I thought when I looked into your reference room downstairs that you didn't do much reference work in this library, but I guess you do all right, only it's all done up here."

"No, not all," Mrs. Allen said, "though I do think myself it's the most interesting part of it, but this is vacation time you know. In a few days now things will be humming downstairs, too, when the schools have opened and the clubs begin to meet."

This reminded John that his vacation was nearly over, too, and he must be on his way.

A big city high school was also a new experience for John, who had had all his early schooling in a small country town. Never before had he seen a high school librarian busy telling one girl where to find out the number of calories in spare ribs for her home economics course and another what qualifications she

would have to have to become an army nurse, finding a picture of Gutenberg's printing press for the school annual and of medieval doorways for the operetta, helping the debating team to find documents for and against the thirteen-month calendar and a group from a civics class to find out who presides at council meetings and signs ordinances in the absence of the mayor.

Aside from problems connected with his pupils' reading and learning, however, he found the public library was better equipped than the school library to provide him with the kind of books and assistance which he needed to continue his researches. He often had to wait for service but found it interesting to watch the many kinds of people who came to the reference desk, to ask sometimes the most curious or amusing questions, only to be met with equanimity, courtesy and effectiveness by the attendants: a school teacher asking for the text of a United States Supreme Court decision in a public school case, a newspaper writer wanting to know the meaning of the Japanese word "Maru," a housekeeper trying to find out how to make orange wine, a clerk wanting to know who the "Potato Saint" was, a music student after a description of the first comic opera in America, a real-estate dealer wanting information on the underground waters of the county, a clubwoman in search of poetical selections on peace, a high school student wanting to know how to make a drumhead, an advertiser asking what per cent of the population of the United States live on farms, a teacher after a picture of Cartwright's loom, an officer of a mining firm wanting information on moisture in washed coal, the chairman of a relief committee asking for the names of the directors of the Chase National Bank, a commercial artist wanting to know the colors of the uniforms of the Swiss guard in the Vatican, a messenger from an electrical firm sent for the specifications of insulated cables. John especially admired the patience of the staff in ascertaining what shy or taciturn people really wanted, and their quickness and tact in recognizing and correcting mistakes in pronunciation or spelling that were preventing people from finding what they wanted.

* * * * *

As John was finishing his third year of teaching he received a letter from one of his friends on the faculty of Fairfield University where he had received his first two degrees:

DEAR BOBS:

Prexie tells me he's been trying to get you to come back here and take over the Ec. department, but you are holding off for some reason. Says you seem to be tied to the fleshpots of Egypt, especially their libraries. I suppose you are thinking of us as limping along in the same old way with old Prof Johnson in charge of the library and poor little Mary Baird working her head off with only a parcel of students to help her, but I'm here to tell you you wouldn't know the place now. After Johnnie passed out of the picture they got a young fellow from one of the libraries up yonder. It was by his suggestion that they applied for and got some money from one of the foundations and with the help of that he's making a real library for us.

One of the things he's done is to bring down a reference librarian from the big

university library where he came from. Some of the Old Guard were sniffy over that at first. There wasn't any librarian could tell them anything about books and as for the students, do them good to hunt for themselves if they wanted anything more than what was on the reserve lists. But she's got them eating out of her hand now. She's friendly and she's intelligent. She doesn't jump away the minute you ask her where the books on democracy are. She stops and talks with you and the first thing you know you've told her you want to find out who it was of the old classic writers that claimed a democracy was as despotic as a tyranny, and then, by George, if she doesn't look in just one or two books and bring you the very passage from Aristotle! And it would have taken you—or perhaps not you, but me at any rate—hours to dig it out for myself. It's like magic, the way she handles books. If anyone asks a question at the club now, somebody is sure to call out, "Ask Miss Fiske. She'll find it."

Oh, another thing they've done at the library is to get one of those reading machines so that the whole world's at your disposal. Anything at all you want—ask Miss Fiske and if it's in the library she'll find it, and if it isn't she will, too, and bring it right to you from the ends of the earth.

So, if it's the library that's keeping you—just come and see what we have now.

Here's hoping you'll join us.

FRED

Telegram:

PRES. R. T. CHISHOLM,
FAIRFIELD UNIVERSITY.

I ACCEPT YOUR OFFER AND WILL BE THERE SEPTEMBER 1.

JOHN H. ROBERTS

I

THE SCOPE OF REFERENCE WORK AS A BRANCH OF LIBRARY SERVICE

The Meaning and Content of Reference Work

Definitions

A search for published definitions of the branch of library service commonly called reference work reveals none that is not either too narrow or too broad. Some are both! To say that it is "that part of library administration which deals with the assistance given to readers in their use of the resources of the library"¹ is too narrow because in these days the reference librarian may assist readers to use resources outside his own library. It is too broad because practically all members of a library staff assist readers indirectly if not directly. The cataloger furnishes the reader with an aid to the use of the library, and the page who brings books to the reader is certainly helping him in his use of the library's resources; but neither is generally considered to be engaged in reference work.

The attempt in 1929 to differentiate reference work by defining it as "direct" or "sympathetic and informed personal aid in interpreting library collections for study and research"² was soon made obsolete by the development of separate library departments for the aid of readers in adult education. It was also, from the beginning, too narrow a definition because many of the readers who are aided by reference librarians, even in libraries organized primarily for study and research, are in need of information to be put into immediate practical use rather than in connection with intellectual pursuits. The lecturer who wants to know how to pronounce Rzhev may seek aid from the reference department after he has finished the study and research in preparation for his lecture.

Moreover, all attempts to define reference work have been actually statements of the main objective rather than definitions of the content or scope of reference activities. The actual contact with the reader is the goal of the reference librarian's work, but all the time he spends in answering questions may amount to less than half of the hours in which he is engaged in work pertaining strictly to his special department of library service.

Reference work includes the direct, personal aid within a library to persons in search of information for whatever purpose, and also various library activities especially aimed at making information as easily available as possible. Selecting and organizing materials with this end in view is as important a part

¹Wyer, James I. *Reference Work* (Chicago, A.L.A., 1930), p. 4.

²*Ibid.*

of reference work as their interpretation to the individual reader. It is the driving power without which the goal cannot be attained. For efficient reference service the library administration must provide the necessary equipment of quarters and books as well as a staff trained in their use. The staff members who use materials for the purpose of finding information are the ones best fitted to select and organize them for that purpose because they know what is needed and how it is used. Contrariwise, the persons who select and organize them are thereby better fitted to interpret materials because of the firsthand knowledge they have gained in handling them. This may suggest that catalogers are well fitted to do reference work. It is admitted that cataloging is part of a good preparation for reference work and that the bibliographical work done by reference librarians is merely an extension or specialization of cataloging.

Reference Technique the Same in All Libraries

As a matter of fact, it is largely in the matter of selection of materials that reference work varies with the library. The actual techniques used in answering reference questions are fundamentally the same in all types of libraries. Moreover, a perusal of many lists of questions from various kinds and sizes of libraries reveals an astonishing number of questions of a similar nature, many even identical, recurring in libraries of different types and sizes and in widespread localities. Requests for information on company stores appear in lists of questions from a special library in New York City and from a public library in the Middle West. The same public library filled another person's request for material on the electric eye, a subject which appears also on the list of a New England college library's reference questions. Someone in this college library wanted to know how to address a Senator, while a reader in the public library wished to know how to address a letter to the President. Owners of sick canaries patronized both libraries. A high school student asked his librarian for the provisions of the Locarno Treaty, and a college student asked for material on the treaty's effect. The "zoological name" of the Rocky Mountain goat was wanted in an eastern college library and its picture was called for in a public library in its own region. The public library reader who wanted a history of the clothespin had her counterpart in the college library reader who was investigating the history of sandboxes for drying ink. At not very great intervals two persons, one in a New England college library and the other in a public library of old England, were trying to find information about William Church, an Anglo-American inventor.

The proportion of questions of a practical or theoretical, easy or difficult, popular or scholarly nature, may vary, but every library has some of every kind sooner or later and should have on its staff persons who know how to handle all kinds of questions. Naturally a small library cannot contain the materials needed for answering every question—in fact, no library can—and every reference librarian should know when and where to apply outside of his library for information that cannot be found in it. Sometimes the largest library

has to refer to the smallest. It is much easier, for instance, to find colored pictures of pirates in the children's room of a small branch of a public library than among the scholarly treatises on piracy in a university library. Nevertheless, this is a request that has been made in the latter. Even the research worker may find preserved in the local collection of a small rural library the pamphlet he needs which larger libraries, if they ever possessed it, have lost or discarded.

Variations in Materials, Organizations and Policies

Since any library may at some time have to answer questions of various kinds or find information on any subject, for inquirers with various purposes, interests and occupations,³ it is only the preponderance of one or another kind of question, subject or patron that determines the selection of materials and affects the functions which the reference department performs in addition to answering questions. The reference librarian of a college or school library will have a greater repetition of questions relating to the subjects in the curriculum and will combine teaching the use of books with the answering of questions more often than the reference librarian of a public library. The reference librarian of the university or special library will be doing more in aid of research and will handle more documentary materials. The reference librarian of the public library will usually have to adapt himself to a greater range of intelligence and education in those whom he helps hour by hour and to a greater variety of subjects than the others. More of his questions, too, will probably have a close relation to the practical problems of living and getting a living. Nevertheless, not all of the questions in a school or college library spring from the curriculum; research workers in the university or special library bring their personal, practical problems to the library as well as those connected with their work. And a student or a research worker may turn up at any time in the most remote village library. Each library will base its selection of reference materials on the kinds of people and questions it generally has, and when it has made the best of the resources it has for the unusual questions in vain, it will turn to some other library for aid.

The organization of reference work varies also with the organization of the library. In libraries with very small professional staffs, for example, public libraries in rural communities, branches of city libraries, special libraries and school libraries, there is likely to be no reference department or reference librarian, and the reference work is done by any qualified member of the staff. In a large public library this may also be true.⁴ In libraries with subject divisions, reference work is done in each division as well as, or instead of, in a general reference department.⁴

The attitude of the library administration toward reference work will also vary from the greatest liberality to the greatest conservatism, both as to the

³Van Dyne, Catherine. "The Organization and Work of the Lending Department, the Newark Public Library," *Library Quarterly*, 11:69-84, January 1941.

⁴Barton, Mary N. "Administrative Problems in Reference Work." In Pierce Butler, ed., *The Reference Function of the Library* (Chicago, Univ. of Chicago Pr., c1943), p. 218-48.

people whom it will serve and as to the extent and kind of service to be performed for each individual. A library maintained for the benefit of a restricted group, such as the library of a private educational institution or of a business firm or of an association, is not so likely to give reference service to all comers as a tax-supported library of a municipality, county, state or state university. On the other hand, it may go further in its service to the individuals it does recognize as its own beneficiaries than the library with an unlimited clientele.

II

REFERENCE QUESTIONS

Definition of Reference Question

No Universally Accepted Definition

Although the term "reference question" appears often in most modern books and articles touching upon reference work, a search for a definition of reference question fail to reveal any in print or universally accepted. Requests for impromptu definitions elicit such widely divergent concepts as "a question that can be answered by a reference book" and "anything anybody asks about anything he wants to know." Every reference librarian will agree that the first is much too limited a definition, since a large number of the questions generally considered reference are answered by means of other than reference books. Even to say that a reference question is one that may be answered by means of printed materials is not comprehensive enough, for reference librarians do not hesitate to seek answers wherever they may be found, even in the mind of some person. The other definition is as much too broad and indiscriminating, since it would include such questions as "Where is the Music Room?" "How long may I keep this book?" "When will Miss Brown be on duty?" Surely this kind of question, which can be answered at once, often by a doorman or janitor or page, from merely a personal knowledge or reference to a building directory or to a compilation of rules and schedules, might well be termed simply a general library question.

Distinguished from Research

One thing that should be eliminated once and for all in any attempt to define a reference question is the idea that the mere length of time it takes to answer a question has any bearing on its claim to being "reference" or "research." A question which takes one reference librarian a quarter of an hour to answer may be answered by another with different, but not necessarily superior, material and mental equipment in less than a minute. On the other hand, a question which, under the best of circumstances, takes hours to answer is not for that reason a "research question," a term that has been much abused by librarians and teachers. Finding out just when and how the expression "reference question" came into use is itself a research question rather than a reference question, but not just because it takes time. It, like many research questions, involves reference work as well as research. It may start with the process of tracing references in the indexes of the *Library Journal* and *Public Libraries*, by which it is possible to ascertain that the first use of the term in articles on reference work in those two journals

was 1902 and 1899 respectively.¹ This, though consuming considerable time, is only answering a reference question. The actual determination of the origin of the expression, however, would involve research methods: interviews and correspondence with elderly members of the profession, examination and dating of original documents (library reports and library school archives²) and historical manuscripts (diaries and letters of librarians). Perhaps this simple illustration will serve to distinguish between a time-consuming reference question and the research question, which requires the scientifically accurate discovery, collection, analysis, evaluation and interpretation of data, and results in a conclusion based on related facts which, so far as records show, has never been drawn before. In the process of solving a research problem reference questions may arise whose solution may help the research; for example, in addition to the reference work already done on the above problem the researcher might ask: Where can library reports for the nineteenth century be found and what bibliographical and biographical material is available on librarians?

It is true that it is not always possible to recognize a research question until considerable work has been done on it. The first procedure on any question is a search for the results of research already done, whether a firsthand report in some scholarly treatise or journal or a summary or exposition in a reference book, textbook, popular book or magazine. It is only when the librarian and the inquirer are both assured that no one has ever found and recorded an answer or made a contribution toward a solution that the question may be turned back to the inquirer as a research question which the library, in many cases, cannot undertake. Policies of libraries in regard to the amount of research their staffs are permitted to do vary with the type and purpose of the library. Whenever time permits, the active participation of a reference department in research, especially historical and bibliographical, is a benefit to the library, as it sharpens the wits of the reference librarian, increases his knowledge of sources and promotes his understanding of the research worker's problems and methods. Even when the reference librarian may not engage in research for others he may and usually should offer aid in the matter of securing materials for research. In addition, if he is sure that he is more skilled and experienced in methods of historical, bibliographical and statistical research than the inquirer, he may well suggest lines to follow, unless the library staff includes a research assistant to whom such questions are referred.

Readers Advisory Questions

Another kind of question which may be confused with the reference question is the "readers advisory" or "book selection" question. It was this kind of question,

¹Mudge, Isadore Gilbert. "Illinois State Library School Instruction in Reference Work," *Library Journal*, 27:334-35, June 1902.

Rickey, V. O. "Use of Reference Books," *Public Libraries*, 4:364-66, October 1899.

In 1878 Justin Winsor called the same kind of question a "library question." (*Library Journal*, 3:159, June 1878.)

²A list of "Reference Questions" used in the New York State Library School bearing the date 1896 is in the archives of the Columbia University School of Library Service.

as well as the request for specific facts, which led to the establishment of reference department staffs or information bureaus in order to free certain librarians from routine duties that had prevented their giving to readers the personal and individual attention required by both kinds of questions. Samuel S. Green at the Philadelphia conference of librarians in 1876, in talking apparently about the reference department of the Worcester Free Public Library, remarked that "the librarian is often consulted about courses of reading, and his judgment in regard to what are the best epitomes of the histories of different countries, and of different branches of knowledge, is frequently sought for." In addition to examples of requests for specific information he told of a board of trade calling for the best treatises on the metric system and of a young man asking for a list of books to read on shipboard while on a voyage to India for his health.³ The "List of Questions Asked of Library Officers" in the Providence Public Library *Annual Report for 1888* includes such requests as "the best work on the reign of Louis XIV," "one or two books on the tariff which will be intelligible to pupils about 14 years of age," "some trustworthy work on psychology," and (even then!) "Can you refer me to anything on democratic government, taking the unfavorable (or European) side?" This list was referred to in succeeding reports as evidence of the need for personal guidance and was undoubtedly an aid to the establishment of an information bureau in that library three years later.

The great stream of published reference and reading lists compiled by reference departments, which gathered force in the 1890's, bears witness to their practice of advising readers on what to read on various subjects. Many of these were prepared in answer to a specific demand, often of a club or debating team or one of its members, and others were compiled in slack times as a forehanded measure in preparation for rush periods. They were the forerunners of the lists now compiled, more scientifically, by readers advisers.

¶ The popularity of reference departments, however, proved to be so great, and in large public libraries their staffs became so rushed, that in the beginning of the second quarter of the twentieth century, the need, realized again, for librarians to give more time to the individual reader was met in some libraries not by increasing the reference staff but by setting up another separate department to handle this particular type of question and to advise people on what to read. Consequently, this kind of question has to be differentiated from the reference question, although in many libraries without readers advisers the reference librarians continue to handle both kinds. In libraries with both departments there may be considerable overlapping, since an adviser's department reports answering reference questions,⁴ and a reference department, selecting books on given subjects in answer to some requests.⁵

³Green, Samuel S. "Personal Relations between Librarians and Readers," *Library Journal*, 1:74-81, Nov. 30, 1876.

⁴Flexner, Jennie Maas, and Hopkins, Byron C. *Readers' Advisers at Work* (N. Y., American Assoc. for Adult Education, 1941).

⁵St. Louis Public Library. *Information Please* (St. Louis, The Library, 1941), p. 6.

Reasons for Trying to Define a Reference Question

The question may then be raised: Why try to define a reference question, in distinction from other questions? In an undepartmentalized library no definition might be needed. Anyone on the staff will answer any question to the best of his ability and need not consider whether it is a reference question or a research question or a readers advisory question or—just a question!⁶ But in libraries which differentiate between the functions of a reference librarian and a readers adviser, to say nothing of an information desk and a research librarian, it may become necessary to decide at least what kind of a question it is the special province of the reference department to answer, and for that library that kind of a question is a "reference question." Should the conclusion then be drawn that each library must be a law unto itself and formulate its own definition? That is clearly the custom and is one of the reasons why it has been impossible up to the present time to secure comparable statistics of reference work among libraries, since in some libraries the reference department handles all requests for material on any subject and counts them as reference questions, while in others requests are not all counted as reference questions because some of them are handled by the readers adviser. Again, in some libraries one or more information desks, not necessarily under the jurisdiction of the reference department, handle questions about the library which in others are considered reference questions. Even within the confines of one library, if questions are answered in various subject divisions, statistics may not be comparable due to the lack of a clear definition of reference question.

This is doubtless the reason that in studies of the problem of measuring reference service it has been found necessary to classify so-called reference questions into groups. Even this attempt to clarify the situation has not been successful, as an examination of the classified lists of questions asked in various libraries taking part in the "Guerrier study"⁷ reveals inconsistencies not only between libraries but apparently between different librarians in the same library.

Facing the matter squarely, librarians might do well to acknowledge that the work with people carried on by the customary reference department consists not only of "answering reference questions" but also of a share in the aid given to readers in book selection and in the answering of incidental questions common to all departments of the library with which the public comes in contact. Moreover, reference librarians may as well accept the fact that as a library becomes more departmentalized functionally they themselves may lose a considerable part of the work which does not classify as answering reference questions.⁸

⁶A description of the handling of questions in a large library of this kind is in Catherine Van Dyne's paper, "The Organization and Work of the Lending Department, the Newark Public Library," *Library Quarterly*, 11:69-84, January 1941.

⁷Data on file at the American Library Association Headquarters in Chicago, Ill.

⁸The above discussion should not be interpreted as meaning that in libraries with readers advisory departments the reference department is encroaching on another's field whenever it selects books for readers, for the selection of books for certain purposes is always a proper function of the reference department. These distinctions will be discussed further in the chapter on the less common functions of a reference department.

Reference Question Defined for Purposes of Discussion

For purposes of discussion in the chapters immediately following, a reference question is defined as a request from a patron of a library for information of a definite nature which he expects to be found in printed materials and their like or for a certain work or works not readily located in the library. This is undoubtedly a narrower delimitation than would be given by most reference librarians, who are accustomed to handling less clearly defined requests for material on a subject as well as requests for definite facts.

The Reference Interview

Personal and Impersonal Factors Involved

The primary function of the reference librarian—the finding, or aid in the finding, of information—is the first phase of reference work to be considered, because it is the real objective of all reference service. It has been said that “a reference question completely and satisfactorily answered involves three factors: inquirer, reference librarian, sources of materials.”¹ From this the conclusion may be drawn that success depends upon the establishment of the proper relationships between these four factors (for the question itself is surely also a factor). One relationship is purely personal, between the inquirer and the librarian; one is impersonal, between the question and the material; and the others are between personal and impersonal factors, i.e., between the librarian and the question and the material, and, of equal if not greater importance, between the inquirer and the question and the material. If any of these relationships is slighted the work becomes lopsided. If the personal relationships are neglected, although a *correct* answer to the question may be found, it may nevertheless be unsatisfactory to the inquirer. Inaccuracy, on the other hand, may result from too little attention to the impersonal relationships.

One of the obstacles encountered in teaching inexperienced students in a library school how to handle reference questions is the difficulty of giving them firsthand knowledge of the personal relations of reference work. Courses on “reference and bibliography” are too likely to give them the false idea that reference work is purely a technical process and to fail to make them see its connection with the social objectives of the library.

(The necessity for personal attention to the individual reader, which has already been noted, was the incentive to the establishment of information bureaus and reference departments, wherein librarians could take time to discover the inquirer's actual needs and capacities. The reference librarian, like the readers adviser, needs to be *en rapport* with the person whom he is helping. This essential condition of successful reference work may not be apparent at first thought in the so-called “routine” phase of “ready-reference” work, in which the impersonal relation is predominant since the demands are for bare, indisputable facts of a simple character, like the correct spelling of a word or the name of a government official. In this type of question the same material may be used for practically every inquirer. Consequently, for it, no particular attention needs to be paid to

¹Wyer, James I. *Reference Work* (Chicago, A.L.A., 1930), p. 96.

this relation between the personal and impersonal factors. Nevertheless, the personal relation between the inquirer and the librarian remains basic. If the latter takes as his model the manner of attendants at the information desk of a railroad terminal, where speed and accuracy are the only requirements, he may prevent the inquirer from realizing that the reference desk is a place where he would receive the painstaking attention needed in helping him to solve a complex problem. The minimum of courtesy demands that the librarian should treat the inquirer with respect, at least to the extent of looking him in the face, listening to *the end of his speech*, and making sure that his own reply is understood and satisfactory.)

The first requirement made of the reference librarian is approachability, not only easy access physically, but easy intellectual and spiritual access as well. This is to be accomplished not by the librarian's composing his face in a fixed Mona Lisa smile, but by letting it show his inner feeling of interest and welcome. One whose face reflects his thoughts and emotions has only to hope for an interesting question as a reader approaches, and to *think* "How can I help you?" to present the proper appearance of combined expectancy and friendly encouragement without having to say a word. But what if the reader does not look at the librarian, either through failure to observe his presence or through shyness or by intention? As Wyer wrote:

(Library opinion and practice seem delicately balanced as to the niceties and proprieties of accosting those other shy or self-sufficient persons who either flutter vaguely about in the offing or who go straight to catalog, shelves, or vertical files with an air of long having been initiated into the mysteries. The best maxim in such cases is "Offer help unless sure it is not required or desired.") Let no doubting Thomas ask for sure signs that it is not required. The practiced reference librarian will infallibly detect them even in the proud and confident person who fearlessly tackles the card catalog. As his operations slow down, assurance disappears, a vague uncertain look steals into the face, the watcher will shortly recognize the psychologic moment to intervene with "Are you finding what you want?" And if there should be doubtful cases, risk the asking.²

Assistance should not be forced on a reader. He may have a perfectly good reason for preferring to work out his problem by himself rather than take anyone into his confidence. His refusal should be taken graciously and the way left open for him to secure help at some future time, should he desire it.

(One obstacle to approachability in a very busy reference department may be the crowding of several persons about the desk, which necessarily hinders the immediate attention which can be given to the individual. If possible, this should be prevented or lessened by providing a sufficient number of reference assistants, with either individual desks or a large enough desk or counter to accommodate them and their patrons, and by adjusting schedules so as to have enough assistance at rush times. Separating and referring to an inner desk the persons whose requests are likely to take a long time to answer will also clear

²*Ibid.*, p. 98-99.

the outer desk for quick reference work. In large libraries an information desk serves this purpose. In libraries without separate desks for information and reference the same idea may be carried out by dividing the work in a similar way between two or more assistants on duty at the same place.) By these means it should be possible at least to let everyone who is waiting his turn know by a brief recognition, expressed either by a glance or a gesture or a word or two, that he is not being overlooked. Then, when his turn comes, time should be taken for the courteous attention to be given each one.

Time Required for Interview

It has been said by a psychologist that "the giving of time [in an interview] is especially important where there is a relationship of accepted superiority of the person giving."³ Although the librarian should generally not presume that he knows more about a subject than the person who is asking a question and never should assume an air of superiority in any situation, the very fact that the inquirer is asking for help is evidence that *he* assumes that the librarian knows more about the library and how to find information in it than *he* does, and therefore, he, as well as the librarian, accepts the latter's superiority in that respect, if in no other. A failure, therefore, on the part of the librarian to give time to consider his request humiliates him because he and his request appear to be thought not worth attention—and no normal person submits himself a second time to humiliation if he can possibly secure what he wants elsewhere or get along without it.) Consequently the reference assistant who answers a question in a perfunctory or overbearing manner may never have a chance to redeem himself, or, what is worse, his department and library, in the eyes of that reader. It has been said that librarians, as public servants, have to live down a reputation for apathy and rudeness that has been attached to public officials in general.⁴

(Clarifying the Question)

If the question is not of the clear-cut, ready-reference variety, the reference librarian must be prepared to spend still more time in interviewing the reader in order to find out what he really wants and what sort of an answer he is prepared, by mentality and previous education and experience, practical or theoretical, to use to advantage. The fact that interviews at the reference desk are usually impromptu and have to be carried through as quickly as is consistent with success, prevents some of the preliminaries recommended in books on the art of interviewing. Nothing can be found out about the person before he appears face to face nor, usually, about the subject he is interested in, so that there can be no list of questions prepared to suit the case. Usually the only provision for privacy that can be made is a careful modulation of the voice to the ears of the inquirer,

³Bills, M. A. "Public Relations on an Individual Basis," *Special Libraries*, 32:338, November 1941.

⁴Warren, Althea H., and Roden, Lora A. "Courtesy in Library Service." In Clara Wells Herbert, *Personnel Administration* (Chicago, A.L.A., 1939), p. 97-101.

so that the conversation will not reach also the ears of the bystanders.) Keen hearing and a low voice with clear enunciation are needed by the reference librarian if the conference is to be kept private. If there is difficulty in hearing on either side, and the fact that others may overhear appears to be embarrassing, some way should be found for the two to draw aside if possible. This, of course, depends upon the physical setup of the department, but it is a point to take into consideration in planning a reference room.) Although there are libraries and occasions where the short exchange of general remarks of a social nature, generally recommended for interviews, may take place, very often neither the inquirer nor the librarian will feel that he has leisure for such amenities. However, the fact that the librarian is prepared and eager to render whatever service is needed should at once create a kindly and friendly atmosphere and put the reader at ease.)

Since the reader has already introduced the subject of conversation by stating his problem, however vaguely, the natural thing is to begin talking about it. As a matter of fact, the reader, if he stopped to think about it, would probably assume that he was the one who was conducting the interview. (It is for the librarian skillfully to turn the tables and interview the interviewer without his realizing it. There is no trickery in this. It is a matter of taking the reader into confidence as to a plan for the solution of his problem and calling on him for cooperation by showing how a few more details are needed before the actual approach can be made.)

So much has been said and written humorously, but at the same time with ill-concealed impatience and scorn, by reference librarians (especially youthful assistants) about the difficulties of getting readers to divulge their actual wants that there is danger of an assumption that the latter stupidly or willfully and perversely withhold information. Probably this is very seldom the case. (More often the reader simply does not know how to state his needs clearly, or else he is afraid of making a nuisance of himself. In a misguided attempt at self-service he makes up his mind what sort of material will contain the information he is seeking and asks for a book which a person who knew more about books would understand was inadequate. For example, a reader asks for the books on American literature. The reference librarian, recognizing that this is a pretty indefinite request, begins with the subject as introduced and replies that there are quite a number of books on American literature in the library and that it might save the reader's time if he would tell whether he wanted to find a little about a good many authors and books or a lot about some particular one or something else on the subject. From his answer it may be seen that what he wants is a particular poem. Further questioning brings out the fact that all he knows about it is that he heard it over the radio the other night and it was about such and such a thing or it had such and such a refrain. Eventually it is run down in an anthology of *English* poetry or of newspaper verse instead of in a book on American literature.)

(Often the inquirer is so preoccupied with his own special problem that he does not realize the vagueness or ambiguity of his request, as in the case of the

reader who asked for books on carving and was surprised to have the assistant ask him if he was interested in sculpture, wood carving or meat carving.⁵) Perhaps he had recently become head of a family and was struggling with new duties, for the last was what he wanted. This was a more efficient handling of a reference question than that reported from a library in which much time was spent in bringing books and articles on porcelain to a reader who, it was finally discovered, wanted to find out how false teeth were made. Such stories as the last may be amusing, but they do not reflect much glory on the skill of the reference librarian.

(It is never safe to assume that even the most intelligent and well-educated reader knows what is best for his needs.) A college professor asked for dictionaries of business terms, and while the librarian of the business department library of the university was pointing them out to her, she made the remark that she wanted to find out what the collector of internal revenue meant by telling her that she had "received income *constructively*." This put a new angle on the question and the librarian then directed her instead to Commerce Clearing House, *Federal Tax Service*, from which she could ascertain the exact significance of the term as used in this particular instance.

(If the request seems peculiar, a start may be made by restating it in a different way and asking if that is what is meant or would be satisfactory. For instance, when a college Freshman asked for a "biology of the stars," the puzzled reference librarian asked first, "Do you want an astronomy?" and then, "Is it an astrology you want?" When she received the reply that neither of these would do, by asking just what he wanted to find out about the stars she elicited the fact that he wanted information about Douglas Fairbanks' father and mother. This ambiguity in the use of words often makes for confusion in the relations between the reference librarian, the questioner, and the question, so that it pays to take time to be sure that both parties in the interview are using words in the same sense.)

(Frankness on the part of the librarian in admitting ignorance or uncertainty as to the meaning of a topic may perhaps for the moment lessen the confidence of the inquirer, but this may be quickly reinstated by furnishing pertinent material as soon as understanding has been established. On the other hand, fumbling and offering books on the wrong subject delay the satisfaction of the reader and leave a lasting impression of ignorance and inefficiency. In fact, respect for the ability of a reference librarian may be enhanced by his quickly producing information on something of which he has admitted he had never heard five minutes before. For example, the first impulse of a reference librarian to consult books on economics for "something on bonding railroads" was fortunately repressed, and the question, "You said you wanted something on railroad bonds? Is this for a course in economics, or business?" brought out the fact that the inquirer was an engineering student and wanted articles on the mechanical process of providing conduction of electricity through the rails. Whereupon, the reference librarian admitted that this was a new subject to her and laughed at the joke on

⁵Woodbine, Herbert. "Reference Libraries," *Library Association Record*, ser. 4, 4:180, April 1937.

herself in misunderstanding. By showing the student how to choose for himself the kind of an article he wanted from the *Engineering Index*, she proved that she knew something he did not know in his own field.⁶ Note, however, that the librarian first turned the laugh on herself. Never should the inquirer be allowed to think that *he* is being ridiculed. Dr. Bills says :

Individually . . . people must be taken seriously. When you come to dealing, except among friends well known to you, with the individual, a keen sense of humor, unless held well under control, is usually a detriment and not an asset. . . . Most humor when it develops between two people who are not well known to each other, tends to be one-sided, especially if one is of superior authority to the other and is in surroundings familiar to him. . . . When humor is one-sided, in nine times out of ten the enjoyment of it is confined to the person exercising the humor. The recipient may bear with it and may indicate some enjoyment, but I think it is very seldom real. More often he feels that fun is being made of him and is fearful that other visitors may overhear.⁶

Ascertaining the Reader's Needs

(Learning the person's capacity is a still more difficult and delicate problem. Especially in a public library, it is essential that the reference librarian be able to recognize and distinguish (1) the specialist, who already knows much more about the subject and its literature than the librarian, (2) the "educated non-specialist . . . who is intelligent, well-informed and accustomed to the use of books,"⁷ (3) the person who has practical knowledge of his subject but is unfamiliar with its literature and with the use of books in general, and (4) the person who has little or no knowledge of the subject and so little reading ability that only the simplest statements can be used and even those may have to be explained and interpreted. One of the reasons why reference work in a research library, whether university or special, or in a junior college or school library, is easier than in a general public library is that there are not only fewer inquirers but also fewer varieties according to the categories just outlined. The librarian in the research library deals mostly with the first group and very seldom with the last, and the reference librarian in the junior college or high school library seldom encounters either of these two groups. His problem is rather to distinguish between the uninstructed and the lazy student.)

(If throughout his interview the librarian maintains a friendly interest, takes pains to talk the language of the reader, listens carefully, and from time to time tries to put himself in the other person's place, he can learn a good deal about the person from his answers to questions as to how he became interested in the subject, what he already knows about it, whether he knows how to use certain reference tools, and what use he intends to make of the information. Since the blunt question, "What do you want this for?" would undoubtedly antagonize the reader, the librarian may exercise his imagination as to two or three possible uses

⁶Bills, *op. cit.*, p. 399.

⁷Tompkins, Miriam D. "Classification of Readers." In John Chancellor, and others, *Helping the Reader toward Self-Education* (Chicago, A.L.A., 1938), p. 78-79.

that might be made of it and ask in rather general terms which of these is the right one, intimating that it might make a difference in the material to be consulted. Questions as to how much and how recent information is required may draw out the purpose of the inquiry and at the same time indicate that the librarian is giving careful consideration to the problem. Two things to avoid are the asking of unnecessary questions which do not help in the understanding of the problem or the reader and the projection of the librarian's own educational background and interests into the situation, thus coloring his impression of the reader's capacity and interests. The former prolongs the interview unduly and tends to irritate the reader, and the latter is likely to result in overwhelming him with much more information than he wants.

As the reference librarian talks with the reader he must also carry in the background of his consciousness the materials, or at least the types of material, which may contain the data wanted and consider their suitability for the person and his aims, as he learns about them, so that by the time the interview is ended the plans for his search are ready. In fact, actual searching for material may in some cases go hand in hand with the interview. Advantages of this somewhat complicated process are that the reader feels that something is being done for him and the librarian has the opportunity to judge from the reader's reactions to material shown him whether his judgment of the reader is right.

If the reader absolutely repels all attempts to get his cooperation, there is nothing to do but let him go his own gait, and if and when his true object is revealed in the end perhaps the reference librarian may suggest that if he had realized sooner what was really wanted, he could have been more helpful in the beginning. If the reader's unresponsiveness and stiffness were due to a feeling of inferiority he may feel relieved at the acknowledgment of failure in comprehension on the part of one who he thought felt superior, and will be more at ease another time. Eventually he and the reference librarian may come to be entirely *en rapport* and enjoy together the satisfaction that comes to both inquirer and reference librarian when they have worked out together successful solutions of the former's problems.⁸

The use that the inquirer intends to make of the information he is asking for has a direct bearing on the materials to be used. Many people are satisfied with the data found in the generally reliable reference books, but for some purposes it may be necessary not only to compare reference books, but to go back of them to primary sources. This is true in research work, where an important process or conclusion may depend on an absolutely exact and correct name or figure; in publishing or public speaking, where an error of fact may cause serious embarrassment or even a suit for libel;⁹ in practical affairs—the professions, business, manufacturing, household management—where antiquated or inaccurate information may result in loss of life, health or property.

⁸Bryan, Alice I. Questions and answers, addendum "The Art of Interviewing" (mimeo.), p. 3.

⁹Carter, J. H. "Libel Law Pertaining to Newspapers," *Special Libraries*, 32:256-58, September 1941.

The conscientious reference librarian may ask whether it is ever ethical to give out unauthenticated and doubtful information such as is found in popular reference books, handbooks of general information, dictionaries of dates and their like. Sometimes apparently the inquirer himself really does not care whether the information is correct or not, since it is to be used for a paper or report that has been assigned in club or school and the chief concern is filling a certain number of pages or minutes. If the purpose of the paper is entertainment rather than instruction or if the report is merely an exercise in expression, it would certainly be a waste of time for both the librarian and the reader to search and weigh authorities, although the warning should be given not to rely on the authority of such books as those mentioned. The reference librarian must keep a sense of proportion and use good judgment, based on what can be learned of the inquirer's purposes, as to the amount of time and thought to be spent on a given reference question and the kind of material to be used. The problem of the amount of time and help to be given to the puzzle worker and contesteer will be discussed later in the section on 'administration, as the policies of libraries differ on this question.

Results of the Interview

The desired results of the reference interview, then, may be summed up as twofold: first, the establishment of cordial relations with the inquirer so that he will not only cooperate in the solution of the problem he has presented but also will maintain confidence in and a friendly attitude toward the library, and second, the clarification of the problem so that the librarian may know how to proceed to its solution. If the question is in a field or on a subject totally unknown to the librarian and even after the reference interview he is still uncertain how to proceed, he may do well to seek information in a dictionary or an encyclopedia or a general book or article on the subject. Incidentally, he may find in these something of interest for the reader's immediate perusal which he may set before him while he waits, as the waiter in a restaurant sets a glass of water and a plate of rolls before a hungry patron for him to nibble while his order is being filled.

There are several circumstances for the librarian to consider in deciding upon whether to encourage the inquirer to accompany him in the search. One is the physical plant and the policies of the library. Do distances within the library, crowded conditions, or the value of materials to be consulted make it impracticable or imprudent to conduct people about? Another consideration is the status of the inquirer. Does he want the information for himself or is he merely a messenger? Can he spare the time? Does he show an interest in the method of search or would he profit by observing it as is generally the case in a school, college or university library? The type of question also enters in. Is it one which may take so long a time to answer that work on it must be intermittent? Finally, will the librarian work more efficiently alone or with the reader at his elbow to consult as he proceeds?

There is also the question of whether the reader may be sent on the search by himself simply with advice on what to consult. This depends on the same factors noted in the previous paragraph, namely: whether the inquirer is capable of efficiently consulting catalogs, indexes, and other books and files and may be properly sent off without escort; whether the materials he will need are on open shelves; whether the librarian has so many other demands on his time that he must take advantage of all the work the patron can and will do for himself; and whether the question is one whose method of solution can be predetermined.

Technique and Methods of Answering Reference Questions

Classification of the Question

By the end of the interview the librarian will probably have spontaneously, as it were, classified the question as belonging to some broad subject field such as literature or chemistry or music, but, more important, he should also have been considering what kind of information is needed in relation to the type of materials to be used: bibliographical, biographical, statistical, historical, current, practical, theoretical. He may also have recognized the necessity of estimating the probable difficulty so that he may know whether it is wiser to devote his time at once to it or to ask the reader if he is willing to wait or return for an answer some other time. If the last arrangement is agreed upon, the reader's name, address, and telephone number should be secured, partly to show him that the library "means business," but more essentially to make it possible to communicate with him if need arises while work is being done on the question and to ensure, by means of a file of "requests to be called for," that he will get either the information or a report on the work done even though he returns when the person handling it is busy or off duty.

Answering Reference Questions a Reasoning Process

When the librarian is satisfied that he knows just what he is looking for, he proceeds to consider the various aspects of the question and to make corresponding hypotheses as to the materials, which are likely to contain or lead to the information. This is clearly a reasoning process and it should be thought through before a step is taken or a hand lifted toward a book. For many questions it takes place with lightning speed in the mind of the experienced reference librarian so that it would seem to the bystander, and perhaps even to the thinker himself, to have been omitted. The inexperienced reference worker, and at times the experienced, will find Hirshberg's *Subject Guide to Reference Books*¹ a useful stimulus to his thinking, but he should not rely on it as a substitute for thought.

Of course, when the librarian knows by experience that the answer is actually in a given book he does not have to "stop to think." He *knows*, for instance, that any English word which has been in common usage for a number of years is sure to be in one of the unabridged dictionaries, that a biographical sketch of the President of the United States will surely be found in the current

¹Hirshberg, Herbert S. *Subject Guide to Reference Books* (Chicago, A. L. A., 1942).

Who's Who in America, that a large-scale map of any state in the union will be found in the *Rand McNally Commercial Atlas*, that a list of articles on a subject which has filled popular magazines for months will be found in the *Readers' Guide*. On the other hand, they are pure hypotheses based on previous experience that an English word he has never heard of may be in the dictionary, that there may be a biographical sketch of the author of a new American book in the *Who's Who in America*, that the location of a place he has never heard of may be found through the indexes of Rand McNally, and that a reference to a popular article on some technical subject may be in the *Readers' Guide*. If he acts on these hypotheses either by consulting the works himself or advising the reader to do so (and to come back if unsuccessful) he must be prepared to make another hypothesis if his first one proves wrong. At first he may simply try another book of the same type on the chance that there is a deficiency in the scope of the first book. If the word is not in Webster's perhaps it is in the *New Standard*, or the *Oxford*, or the *Century Dictionary*. If the writer is not included in *Who's Who* perhaps he is in *Current Biography* or *Current Biographical Reference Service*. If the place is not in the indexes of Rand McNally, perhaps it is in those of Hammond or Century. When, however, the general books of a similar nature and scope fail, then it becomes necessary to take another view of the question to see whether something in it will suggest another group of books. By conversation with the inquirer he has learned (or will learn if he failed to do so earlier) in what connection the word whose meaning or origin is wanted was seen or heard, and if he can thereby establish its subject field, he will then work on the hypothesis that a dictionary or encyclopedia of that subject will define it. If that fails, or there is no special dictionary or encyclopedia of the subject available, he may try the vertical file, a bibliography of the subject or an index of dictionaries on the hypothesis that there may be a glossary of special terms which would contain a definition of the elusive word hidden away in some pamphlet, book or magazine. If he finally concludes that there is no available material of the dictionary type, he turns to articles on the subject on the hypothesis that one of these may either include a definition of the word or use it in such a way that its meaning is made clear. After considerable search, perhaps page by page, a definition may be found or constructed.

It is plain, therefore, that the process of finding information is a series of forming and testing hypotheses. Success in reference work depends largely upon the ability to *think*, which, John Dewey says:

... involves ... the suggestion of a conclusion for acceptance, and also search or inquiry to test the value of the suggestion before finally accepting it. This implies (a) a certain fund or store of experiences and facts from which suggestions proceed; (b) promptness, flexibility, and fertility of suggestions; and (c) orderliness, consecutiveness, appropriateness in what is suggested. Clearly a person may be hampered in any of these three regards: His thinking may be irrelevant, narrow, or crude because he has not enough actual material upon which to base conclusions; or because concrete facts and raw material, even if extensive and bulky, fail to evoke suggestions easily and richly; or

finally, because, even when these two conditions are fulfilled, the ideas suggested are incoherent and fantastic, rather than pertinent and consistent.²

The reader who knows that he wants a certain poem, but who, trying to be helpful, asks for books on American literature, has made a poor hypothesis, due rather to a lack of experience than to a lack of imagination or of logic. The library school graduate who may have stuffed his mind with facts about reference books may yet be unable to handle a question in the reference room efficiently because he has not laid in a store of facts about the question before he starts to think about it. No amount of native ability to "put two and two together" will avail if one of the "two's" is lacking.

✓ *Qualities Needed for Success*

☞ To do good reference work, however, something more than a head full of facts about books and a clear understanding of the information sought is needed. Just as important as a good memory is a good imagination, that constructive power of the mind "which modifies and combines mental images so as to produce what is virtually new." This is the spark that leaps from the question to the probable source of the answer. With a good imagination goes mental flexibility. A person with a "one-track mind" will label a question once and for all as a bibliographical or a biographical or a statistical question in a given subject field; and when the avenues chosen on this basis prove to be blind alleys, he is entirely at a loss how to proceed because he does not realize that the question may be related also to an entirely different subject field and may be placed in an entirely different setting from that in which he first pigeon-holed it. For example, trying to find a work of a given title by a certain author published in a specific year appears at first sight to be a bibliographical question, but a thorough search of bibliographical aids—library catalogs, national, subject and author bibliographies, indexes—may fail to prove that the work was ever published. What more can one do? Forget the first conception of the way to solve the problem, recharge his batteries, and start the imagination to work on the possible circumstances of the publication. He may recall that the publication of a work is an event, more or less important, in the life of the author, and therefore look up biographies. Even though no mention is found of the work in question, the fact revealed in some biographical sketch, that the man was at about that time connected with some committee, commission or bureau investigating the subject of the work wanted, should suggest the possibility of its having been published under the name of that body and thus listed in bibliographies, in spite of its being popularly connected with the man to whom the authorship was attributed in the question.

To good memory and imagination should be added a group of qualities often found together: thoroughness, orderliness, persistency and observation. The person who is not thorough will miss information that is in an appendix or supplement or that is entered in an index under a synonym of the only word under which he looked; he who is not orderly will have trouble in remembering

²Dewey, John. *How We Think* (Boston, Heath, 1910), p. 30.

which volumes of a long set he has looked in and will not keep intelligible notes of his search; he who is not persistent will neglect to return for the volumes that were not on the shelves when he first wanted them and will not have patience for a long tedious search. An unobserving person will overlook numerous clues, failing to realize their significance. This gathering of a little information as one goes, here a date, there a name, which, added to what the inquirer could already supply about the question, suggests other hypotheses opening up new avenues of search, is a most important procedure.

An example of this noting and following of clues is the course followed in gathering material on the life of Thaddeus Hyatt, an American noted in his time who, nevertheless, is not included in the general encyclopedias and national biographical dictionaries. The dates of his birth and death were discovered from the card catalog, as well as the facts that he had had privately published in London in 1877 a pamphlet on experiments on fireproof building materials and that Charles Sumner had made two speeches in the United States Senate, June 15, 1860, on Hyatt's imprisonment. The depository catalog of Library of Congress cards listed under Hyatt's name another pamphlet on aerial navigation, also privately printed in London, a book of poems, privately published in London and New York, a petition to President Buchanan in behalf of Kansans suffering from drought and famine, and a compilation of Hyatt manuscripts in the *Transactions* of the Kansas State Historical Society. The date of his death, 1901, led to obituaries, including one in the *Annual Cyclopaedia*, which confirmed the catalog clues as to his inventive bent, his part in Kansas relief, and his imprisonment (for failure to appear to testify before a Senate committee investigating the Harper's Ferry episode) and added John Brown's, Horace Greeley's and Wendell Phillips' names to Sumner's. From these clues the search spread out to include Patent Office and other United States government publications, antislavery literature, diaries and letters of famous abolitionists, and engineering and Kansas historical society publications, all of which furnished information of one kind or another. This exemplifies an approach through bibliographies to the answer to a biographical question and illustrates the fact that the library's own card catalog is a very good place to start a search.

Finally, the efficient handling of reference questions calls for judgment. Although the librarian's chief contribution is the discovery rather than the criticism of information, he often has to evaluate or help in the evaluation of authorities, especially when they disagree. People who are accustomed to place great reliance on the printed word are naturally bewildered when they find incongruous or contradictory statements in different books. If not cautioned, they are likely to assume that the five books which agree on a given fact are right and the sixth one, which disagrees, is wrong, when actually the opposite may be true. The five agreeing writers probably copied from one another or from a common source, and the sixth may have investigated the matter more thoroughly and so come to a different and more authentic conclusion. This is very likely to be the case if the independent writer has written his article considerably later than the others, although

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it should not be assumed that the most recent article on any subject is necessarily the most authoritative, since its author may have been careless in his use of sources or erroneous in his interpretation of them. In the final analysis, the decision as to which is right may have to be made by the expert, but the librarian can help by bringing together for comparison works by various authorities and by turning up more or less hidden sources. In this way the origin of an erroneous statement often repeated may be discovered and data may be assembled from a variety of sources which would serve as checks on one another and as corroborating evidence.³

It is natural to assume that reference librarians are experts in solving bibliographical problems. One way to begin to deserve such a reputation is to cultivate the fundamental trait of accuracy, especially as it relates to the identification of titles and authors. It is surprising to the beginner to discover the number of persons with the same name living at the same time, with similar interests, and the number of identical titles that have been given to books or periodicals, especially the latter, the confusion of which leads to the supplying of erroneous information. An excellent instance, on the one hand, of such confusion of two periodicals and of wrong information obtained by the use of reference books only, and, on the other hand, of an effective assembling of evidence from various sources by which the answers were corrected, was afforded in one of our professional journals a few years ago. In answer to a published appeal for help in identifying the editor of the *New Eclectic Magazine* in 1868, five reference librarians agreed in declaring that it was W. H. Bidwell (who was really editor of *The Eclectic*, a different magazine altogether), a sixth was more nearly correct in averring, with citations, that it was William H. Browne (who was editor of the *New Eclectic*, but a year later), but the seventh, using original source materials in the forms of contemporary directories, copyright records, and the journal itself, produced evidence that the editor of the *New Eclectic Magazine* in 1868 was Lawrence Turnbull. This case also brings out the fact that autobiographies are not necessarily to be trusted, since one of the authorities cited by the sixth librarian was an article in a biographical dictionary which was presumably written by Browne himself, who may be forgiven for having a lapse of memory, after twenty-five or thirty years, as to whether he began his editorial work for the *New Eclectic* in 1868 or 1869.

Besides judging the accuracy of the information found, the librarian should also consider its suitability for the person who is to use it, particularly in regard to technical and scientific subjects. From his interview he should have estimated the mental age and vocabulary of the inquirer as well as his knowledge of the subject in general so that he can decide whether the information as he first finds it is in a form that can be comprehended by the less learned reader but would be scorned by the scholar. The use to be made of the information must also be taken into account. For example, if the request is for a picture, the kind of illustration to be offered depends on whether it is to be used for scientific, artistic,

³For an example of such assembling of primary and secondary sources see Wyer, James I. *Reference Work* (Chicago, A. L. A., 1930), p. 108-09.

educational or practical purposes. The commercial artist and the student of botany probably have entirely different kinds of illustrations in mind when they ask for pictures of maple trees. This fitting of information to the reader and his purpose is as important in supplying the answers to reference questions as it is in the selection of materials by either readers adviser or reference librarian.

Length of Time to be Spent on a Question

This detailed analysis of the reference interview and the method generally used in answering reference questions, with the emphasis on the need for taking time for personal service and for accuracy, may mislead one into thinking that it is a leisurely process. Not so! One of the aims of a reference librarian in his program of self-improvement is to increase his speed. The previous discussion, however, should serve to indicate that the proper place for the speeding-up is not in the preliminary consideration of the question but in the actual handling of the books. Although a naturally quick mind is certainly an asset in reference work, the more familiar one is with the tools of his trade in the beginning and the more he uses them in his daily work the more proficient and the speedier he is sure to become. Another way to develop one's speed is to avoid making mistakes. Therefore, the motto, *festina lente*, is a good one for the reference librarian. Take time for a discussion with the inquirer and for making a reasonable hypothesis and you are less likely to have to make another for the same question. Take time for a thorough search and you are less likely to have to cover the same ground twice.

One of the problems in reference administration is to know when a member of the reference staff should stop working on a question. Some people are inclined to give up too easily because they are lacking either in resourcefulness or persistency. Others are so tenacious that, as one librarian has said, it is easier to get a fishhead away from kitty than a question away from a reference librarian. "Thousands of hours are wasted annually by reference librarians who do not know where to stop."⁴

Naturally the length of time that should be put on a given difficult question depends primarily on the claim that the inquirer has on the library in competition with other claims, the importance of the request, and the time at the disposal of the library staff. Inasmuch as these are questions of administrative policy their discussion is postponed to the chapter on administration. Granted, however, priority of the claim, urgency of the request and unlimited time (!) what is the point at which the librarian should give up? Perhaps this may be determined, theoretically, by a discussion of the points at which he or his superior might think he should.

One of these is when the only possible means of finding the information is to scan page after page for perhaps hundreds of pages. Should this be done by the librarian? Well, it has been done many a time in many a library, and under the conditions granted above, perhaps it should always be done; but usually it is done only in cases of supreme priority—for the president, trustee or other high

⁴Wyer, *op. cit.*, p. 110.

official of the institution which the library serves, or some such very important personage. But before undertaking such a task the librarian should make sure that he has not overlooked some short cut or failed to use his imagination to make possible a "spotting" of the information. For example, students in a class in library school will laboriously read through a volume of Edwin Booth's letters from the beginning to find the quotation, "Life is a great big spelling-book, and on every page we turn, the words grow harder to understand the meaning of," when a little imaginative thinking, based on some knowledge of Booth's life and associations, should suggest that he was likely to have made this observation late in life when one blow after another had fallen upon him, culminating in his brother's calamitous deed. The letter containing those words was written, as one might expect, within the year of Lincoln's assassination.⁵

Another point at which the reference worker may be tempted to stop is when, after considering every possible aspect of the question, he can think of nothing else to do. It is a good idea, then, to suspend work on that particular question and to turn to something else. Every reference librarian can tell of having found an answer to one question "accidentally" while working on another, too often, alas, after the need for the first is past. And everyone knows that new suggestions of ways to solve any problem may come when the mind is at rest—as a "dream" in the middle of the night or the first thing on waking in the morning. So one should not give up until he has given his subconscious a chance. But if that fails to produce any new approach, should he then give up? No, he should call on others members of the staff for suggestions. Any one of them may have some additional information on the subject which furnishes material on which to base another hypothesis. In some cases another staff member may know just where to lay his hand upon the very thing. In fact, it is foolish and wasteful of time for the library and the patron when one person spends an excessively long time on any question without finding out whether someone else on the staff has a quicker solution. One should not "pass the buck," of course, but on the other hand one should not keep his hard questions entirely to himself. This is one of the weaknesses of a highly departmentalized library; that through ignorance and pride a department will keep a reader waiting ten minutes to an hour for the answer to a question because its head will not refer the question to or call for the cooperation of another department, which perhaps has the equipment and the knowledge to solve it in less than a minute. Still worse is it to tell the reader that his question cannot be answered when colleagues and superiors have not been consulted.

In considering the problem of how much time should be spent on a question and whether outside aid should be solicited, it is assumed that the reference librarian has concluded that it is answerable, provided the necessary material is available. It is true that some readers, perhaps more often in public libraries than elsewhere, do pose insoluble questions, on which the time to stop is before begin-

⁵For another way of solving this question, see the section on quotations in chapter 5 of this work.

ning a search: requests for statistics that obviously could not be gathered; and information about the unrecorded past, for example, facts about Homer's family—"how many children there were and all possible domestic details."⁶ It is perfectly evident to a person who has the slightest knowledge of ancient Greek literature and history that this question is unanswerable. To satisfy the inquirer, however, a careful and tactful explanation of the impossibility of finding what he wants should be made. If practicable, one might lay before him printed material which either specifically states that nothing has ever been discovered or recorded on the particular point or supplies some information with that implication. In the case noted, one may show articles in various encyclopedias, biographical dictionaries and dictionaries of classical antiquities, which in varying ways testify to the fact that nothing is known about Homer's family.

The insolubility of some other questions may not be so clear, and it is possible also that a question may appear unanswerable to one person which really could be answered by another. It is therefore dangerous to refuse to look for something without verification or consultation with other librarians or subject specialists.

One other puzzling problem in some questions is ascertaining that the right answer has been found: for example, if the source of a quotation is wanted, how exactly must the words found coincide with those in the question, and how may it be determined whether the source found was itself a quotation? Some people quote from memory inaccurately. In trying to trace Walpole's quotation in one of his letters, "Thus far our arms with success have been crowned," the passage in Fielding's *Tom Thumb*, "Thus far with victory our arms are crowned" was found first. One might think that Walpole had misquoted from having heard but not read this play if it were not that a line from one of Dryden's plays more closely resembles Walpole's words, the only difference being the use of "my" instead of "our." Perhaps the easiest way to solve this kind of a problem is to leave it to the reader to decide whether he is satisfied. Then let the search for a more satisfactory answer, if requested, proceed on the same conditions as though it were a new question. •

Finding Information Outside the Library

The matter of cooperative effort may in some cases be extended beyond the library. In cities where there are many libraries of various types and sizes it is frequently the custom for most of them to exchange reference services, at least for important questions. And here again, time would be economized if the librarian of a special collection would not turn his own collection upside-down to find something which he has every good reason to believe could be found in a trice in a large general set owned by the public library; and if the reference assistant in the public library, who has been unable to find information desired by one of its patrons but who has found a reference to a journal known to be in the college library in the community, would call for verification at least. The chagrin that

⁶Moore, Evva L. "Reference Work in a Small Public Library," *Library Journal*, 28:657, September 1903.

results from being told that the information could have been found in a work in one's own library should prevent an abuse of such practices.

The librarian in a small community who does not have other libraries near at hand may have cordial relations with persons who have private collections of books or knowledge acquired in pursuit of hobbies, which they would be proud to share with anyone else with similar interests. In this connection should be mentioned the published recordings of interchanges of personal knowledge of facts, consultation of which should be included in the routine of many reference searches, viz., "notes and queries" series. Not only may the elaborately indexed and lengthy English set with that title and its much younger American counterpart be consulted but similar departments in newspapers and magazines. Some of the latter, indeed, might be included in the indexing projects of reference departments until a comprehensive index to them is compiled and published.

If the inquirer can wait for correspondence, then there is almost no limit to the resources available, for there are many libraries all over the country, and beyond, that are willing to help out another library. Some regions have already organized bibliographical centers for just such purposes and others are developing or planning similar cooperative projects. In states which have no part in a formal or official organization of this kind there is usually some large library which is willing to help on serious questions—a state library or a state university library or a large municipal, county or college library.

Any librarian ought to know where the bibliographical center of his own region is located, if there is one,⁷ or what is the nearest large library that is willing to help. Application should be made first to these nearby libraries rather than to some very large but more distant library, unless the question is of such a special or local interest that it could manifestly be better answered in a library specializing in the subject or locality. The related problem of locating specific titles will be discussed in connection with the subject of interlibrary loans.

Bibliographical cooperation, with its attendant apparatus of union catalogs and surveys of sources, is developing so rapidly at this time that any attempt at definite information in this book would be out of date before it was published. Reference in general may be made, however, to the publications of the Experimental Division of Cooperation of the Library of Congress, the Philadelphia Union Catalog, the Union Catalog of Floridiana at Winter Park, Florida, the Pacific Northwest Library Association, and the Colorado Library Association for current information on bibliographical cooperation in different parts of this country. Some indexes to specialization in libraries of broad geographical scope, which should be a help in determining what libraries to address for information, are *Special Library Resources*,⁸ the *Guide to Library Facilities for National Defense*⁹

⁷A directory of union catalogs in the United States, by A. B. Berthold, is in Robert B. Downs, ed., *Union Catalogs in the United States* (Chicago, A.L.A., 1942), p. 349-91.

⁸Special Libraries Association. *Special Library Resources*, vol. 1, *United States and Canada*, ed. by Rose L. Vormelker (N. Y., The Association, 1941).

⁹Cannon, Carl L., ed. *Guide to Library Facilities for National Defense* (rev. ed., Chicago, A.L.A., published for the Joint Committee on Library Research Facilities for National Emergency, 1941).

and the surveys of southern and New York libraries by R. B. Downs.¹⁰ The American Library Association Board on Resources of American Libraries began publishing in 1940 in the *Library Quarterly* annual lists of notable materials added to American libraries.¹¹

Keys to institutions other than libraries which might supply information are in the nature of directories or handbooks—of museums, e.g., American Association of Museums, *Handbook of American Museums*; of societies, e.g., National Research Council, *Handbook of Scientific Societies*; of laboratories, e.g., National Research Council, *Industrial Research Laboratories of the United States*; of trade organizations, e.g., United States Bureau of Foreign and Domestic Commerce, *Commercial and Industrial Organizations*; of government bureaus, e.g., the *United States Government Manual*. A reference department which is dealing with research workers a good deal should build up a collection of such directories especially in those fields of research in which its clientele is interested.

As a help in locating individual specialists a common practice in many reference departments is to keep a card index of the interests of people in their communities. An index of specialists in science of a national scope was made for defense purposes under the direction of the United States Civil Service Commission and the National Resources Planning Board in Washington in 1940 and transferred to the War Manpower Commission in 1942. If this roster could be published it would doubtless be in demand by libraries.

Asking for help from special libraries or from specialists is a delicate matter requiring tact. As an English writer reminds us, the "question should be asked as a favor, not a right."¹² One should not expect a professional man to supply gratis information which he has spent years of work and large sums of money to acquire; nor a society formed to collect information for its members who pay large fees for the service, nor a library financed by a business corporation for its own research workers and employees, to give the same kind and amount of information that it would to its own clientele. College and university library administrations also may quite justly feel that they cannot allow their staffs to spend much of the time which belongs to their own institutions on outside reference work. But usually if the request is for a definite piece of information, which the librarian asking for it can testify is, in spite of his best efforts, unobtainable in his library but of a character to be easily found and supplied by the other library, he may feel free to ask, though not to have his feelings hurt if his request is refused or ignored. In any case he should always pass on whatever information about the question he has been able to find either through questioning the inquirer or in looking for the answer himself.

If the transmission of the information desired involves reproduction of a

¹⁰Downs, Robert B. *Resources of Southern Libraries* (Chicago, A.L.A., 1938).

Downs, Robert B. *Resources of New York City Libraries* (Chicago, A.L.A., 1942).

¹¹An older but still useful guide is Johnston, W. D., and Mudge, Isadore Gilbert. *Special Collections in Libraries in the United States*. 1912 (U. S. Bureau of Education, Bulletin no. 23, 1912).

¹²Bagley, W. A. *Facts and How to Find Them* (2d ed. rev., N. Y., Pitman, 1938), p. 9.

long passage, the library owning the work may wish to know whether the inquirer would be willing to pay for a photostat or could use a microfilm or print. It might be well in making a request for anything more than very brief information to state whether or not a reading machine is available for the use of the reader and, if so, what type of microfilm is wanted.¹³

One question of procedure that may be raised is whether it is better for the librarian to secure reference aid from outside or to suggest to the person wanting the information that he himself should write or apply in person. The choice depends upon a number of possible factors. First, is this particular question "isolated" or is it a part of a research project likely to involve a considerable number of similar applications to outside agencies? In the latter case, unless one of the objectives of the library is participation in research, as in some special libraries, it would seem proper for the researcher himself to carry on correspondence and visiting, with the help of the library in the way of locating materials and agencies and in the matter of introductions. The last form of aid should prevent the inquirer's being referred back to his own library, which is likely to happen when another library receives a request from an individual who is known to have access, and a better claim, to the services of the library in his own community. Second, is the inquirer capable of writing a legible and intelligible letter? It would be discourteous to both the reader and the other library to insist upon or allow his writing when he has shown that he has difficulties in making his wants known. Third, does the library's budget of time and money provide for correspondence of this kind? It should, of course, but if it does not, it may be necessary either to leave the correspondence to the inquirer or to charge a fee to cover expenses. (It might be well to warn the inquirer of the possibility of a fee which may be charged at the other end. Fees are sometimes used to weed out unnecessary and trivial questions.) Fourth, is the library, institution or person to whom application is to be made one on whom the library has a special right to call, either in the way of reciprocity or from some recognized obligation, as that which usually exists between municipal libraries and their state library? In that case, it may as well use its influence for the good of its patron. Probably in most cases the library is more likely to receive a favorable reply than the individual person.

Instead of applying to specific libraries or persons an appeal for help may be broadcast through one of the notes and queries departments such as the one conducted especially for reference librarians in the *Wilson Library Bulletin*.

Since it has seemed best to describe the process first in general terms, it remains now to give specific illustrations of methods of solving some of the various types of the more difficult reference questions, those which cannot be answered immediately by consultation of well-known reference tools or through *Hirshberg's Subject Guide to Reference Books*.

¹³Further information on photostats and microfilms is to be found in the chapter in this book on work in connection with interlibrary loans.

Bibliographical Reference Questions

Use of the Card Catalog

A request for a specific work by its author and title is one of the most common questions put in libraries and is generally considered the simplest kind of reference question, if indeed it is recognized as a question ever to be referred to a reference department. It can be answered in so many cases by a quick consultation of the library's card catalog, either by the reader or a junior library assistant, that there is a real danger, when it is not so found, that the reader may leave with the mistaken idea that the library does not have the book he wants. To prevent this is one of the reasons why reference librarians advocate stationing a reference assistant at the public catalog. If that is not feasible, a sign near the catalog advising readers to ask for aid and telling them where to seek it if they do not find what they want, and careful instructions to all members of the library staff never to state without careful investigation that the library does not have a specific work, will help to reduce the number of unnecessary disappointments.

When a work is not found at once in the catalog, there are several possible hypotheses on which to base the choice of the method of procedure. The work in question may not yet be cataloged. Unless an entry of some kind is always put in the public catalog for material as soon as it is received, some record not accessible to the public or some person "behind the scenes" must be consulted before it is safe to give a negative answer. Moreover, some items owned by a library may never be separately listed in its catalog because they belong to a collection of a particular type of material, such as government publications, which for one reason or another it is the policy of the library not to catalog. In that case the work must be identified as one of these types and its location found through some special index, bibliography or catalog, either compiled by the library or published by some other agency.

Another reason why the library catalog, through no fault of its makers, may be misleading is that the inquirer may be actually searching for only a part of a book which he supposes to be and therefore represents as a whole book, for example, a single play in a book of plays or a chapter in a book with quotable chapter headings. Libraries are perfectly justified in not making entries in their catalogs for parts of books which are indexed in some one of the well-known bibliographies and indexes. Often the reference department will keep such printed indexes up to date by a card index.

Then again there may be wrong information in the request as brought to the

library. Misspelled names and incomplete and garbled titles are very common errors, which make it impossible for the inexperienced person to find the reference in the card catalog. It may be necessary then to establish the correct entry before one can be sure that the work is really not listed in the catalog and not owned by the library.

The information which the reader supplies, though correct, may not be sufficient for finding what he wants in the catalog. The title of the work may be so abbreviated that it cannot be interpreted in complete words without the help of some key. Or the inquirer may have only the title of a work which by the code of the library's cataloging department is not the kind for which it makes title cards. By use of some bibliographical aid which does include title entries for such works the author may be determined and a card found under his name in the catalog. The *United States Catalog* is probably the best known of general aids that can be used in this way. Aids compiled especially for the identification of books whose authors are generally unknown are listed in Mudge¹ and referred to in the index underonyms and pseudonyms.

Even though the author and title of a book may be perfectly correct in the reader's reference and it may be a complete book and one that is cataloged, the inexperienced consultant of the catalog of a large library may miss it or may lack patience to continue looking for it by his own methods until he can actually run it down. Although it is generally expected that if a book is cataloged at all there will be an entry under its author, it is not always advisable to look for that first; for if it is a name common to many writers, there will be a great number of cards to look through. If the title is unique the book is likely to be found under that much more quickly. If not, the book may be found more readily under its subject if that is known or can be surmised from the title. For example, it would be a waste of time to thumb through fifty or more cards for Brown, John, when the first subject card for Bunyan, John, will reveal the call number of John Brown's *John Bunyan, His Life, Times and Work*. Even though the book had been by John Smith instead of John Brown, it would be found more quickly among the subject cards for John Bunyan than under the author because these are arranged alphabetically by authors and there is likely to have been only one man by that name writing about Bunyan. This use of subject cards instead of author cards is a help also in the case of doubt or error in the spelling of a writer's name, for example, Nichols, Nicolls, Nicols, Nickles, Nickels. It may also even show up a wrong author, as in the request received in writing for "Wise, Ephraim. The Kensington Stone," which turned out to be a book on the Kensington rune stone by H. R. Holand, published at Ephraim, Wisconsin. Such a case as this points to the wisdom of scanning related cards clear through title, imprint, notes.

This habit of glancing through entire entries should be cultivated by users of catalogs, for often in this way a request for a book under its subtitle or an alternative title may be detected. For example, a reader may ask for J. V. L.

¹"Mudge," the reference librarian's Bible, is a term generally used by them to refer to Isadore Gilbert Mudge's *Guide to Reference Books* (6th ed., Chicago, A.L.A., 1936), and its supplements by her and Constance M. Winchell.

Morris' *Employee Training*, which does not appear in the library's catalog, but if he or an assistant reads the whole of the Library of Congress card for Morris' thesis entitled *Training and Education in Industry*, he will discover that this is another printing of the same work. Calls for parts of books may also be satisfied, if contents notes are read. For example, if someone wants Maspero's *Dawn of Civilization* and does not find a card for it but the library has the nine-volume edition of his *History of Egypt*, etc., published by the Grolier Society, a scanning of the contents note on the card for it will show that *Dawn of Civilization* forms the first three volumes of that set. Additional copies of pamphlets may also be discovered in this way by noticing "reprint" notes. If the reprint is not available, the library may have the journal in which it was originally published.

When a skillful and thorough use of library records fails to bring to light a copy of the work wanted, or when it is apparent on the face of the request that it is too incomplete or incorrect to be readily found in them, it becomes necessary to consult printed aids of various kinds if the reader is to be either satisfied or assured that what he wants is not in the library. But before any extensive search is undertaken, an attempt should be made to increase the data known by finding out from the inquirer where he got his citation. If it was by hearsay the probability of misspelled names and garbled titles is increased. Account should be taken of this and various possibilities explored. The mere repeating of the title aloud if it was presented to the librarian first in writing may suggest the correct form at once, when no amount of reading and search would discover it. Readers—and librarians too—have been known to look in vain for "Ilagi Baba." Pronunciation of the first word, however, will prompt one to try also Hadgi, Haji, Hajji, etc., until the correct spelling is found. If it was from a handwritten source, permission to see that should be secured if possible, as the librarian may recognize a name or title with a wrongly transcribed letter more easily than the reader. If it was from a printed source which it is possible for the librarian to see, corrections and completions in many cases can be made from it, which may immediately make it possible to find the reference in the library's catalog. Or information may be gained which points to its being contained in the uncataloged or unanalyzed material in the library.

Footnote Citations

The original source of the reference may be a footnote and therefore certain practices of the makers of books should be kept in mind from which a plan of procedure may be drawn. The citation of a work referred to may not be given completely in a footnote but partly in the text. Therefore, if it is a footnote citation it should be read in connection with the text, which may supply some bibliographical item, such as the date of publication or the author's name or some institution in whose publications it may have appeared. For example, in the volume of the *Oxford History of England* on England, 1870-1914, by R. C. K. Ensor, page 339 has two footnotes:

1. Life and Labour in England, final vol. (1903), p. 59
2. (1891) 1. Q.B. 671

Reading the text at the first reference one sees that the author of *Life and Labour* was Charles Booth. The text referring to the second footnote includes the words: ". . . in the leading case, *Reg. v. Jackson*, the Court of Appeals. . . ." This is enough to indicate that the citation is of a legal document. The list of abbreviations in *Bouvier's Law Dictionary* interprets "(1891) Q.B." as "Law Reports, Queen's Bench Division from 1891 onward."

If the book contains bibliographies, these will usually complete or explain footnote citations. On page 503 of the above book by Ensor, footnote 2 is: "Accounts and Papers, No. 218 of 1914: Agricultural and Trade Development (United Kingdom, Germany, and United States)." The text refers to "Blue-books and White-papers supplying official data." The bibliography, pages 576-77, explains that these are parliamentary papers and refers the reader to their indexes. It should be remembered that bibliographies may be found at the end of sections or chapters of books as well as at the beginning or end of the volume or the set.

If there are no bibliographies, a search in the book for other footnote citations on either earlier or later pages may prove fruitful. For example, in Hore's *Church in England*, volume 1, page 68, there is a footnote: "O. T., iii. 144." The text does not supply anything but a quotation, which is about the Presbyterianizing of the Church of England. It evidently is *not* a reference to the Old Testament! However, tracing back, one finds on page 63 another footnote reference to O.T., and the text, "says Burnet." Further back, on page 31, there is a footnote reference to "Own Times" and the full name Gilbert Burnet is found in the text. Looking up the main reference on Gilbert Burnet in the index of Hore, the searcher is rewarded with not only the author's full name but a completed title of the book, *History of His Own Times*, and the publication dates, 1724-34. Another example: In the second volume of Hore, on page 225, a footnote reads "Nich. Lit. An. viii. 95." This may be recognized at once by anyone familiar with material on English literature, but a subject specialist in religion or history might jump to the conclusion that this meant some annual publication and would not be sure whether Nich. stood for Nicholas, Nichols, or Nicholson. A footnote four pages farther on gives the name Nicholls, which still farther on is given as Nichols, while a previous footnote gives the title as "Lit. Anec." In case the library is a large one with a tray or more full of catalog cards for Nicholls and Nichols, reference to the *Concise Dictionary of National Biography* will quickly identify the author as John Nichols, 1745-1826.

Abbreviated Titles

Abbreviations used in footnotes, bibliographies or just anywhere in a book are among the most puzzling of problems because they may be explained, not at the beginning of the work or the volume, where they would be expected, but at the beginning of a chapter or wherever they are first used by the author, or not at all. The abbreviation *TFT* used in the entry for "The Two Noble Kinsmen" in the *Cambridge Bibliography of English Literature*, volume 1, page 634, is elucidated,

not in the "Key to Abbreviations" at the beginning of the volume but on pages 490-91 near the beginning of the section on Drama, traced through a cross reference at the beginning of the subsection on Jacobean and Caroline Dramatists.

When the author takes it for granted that his abbreviations will be understood without explanation from him, it becomes necessary to find out what such abbreviations usually mean in the hope that thus the reference may be run down. An excellent list of various types and titles of reference books which may be consulted for this purpose is the first "unit" of Hirshberg's *Subject Guide to Reference Books*. The kinds of materials most often referred to by abbreviations are periodicals, society publications, collections and calendars of source materials and government publications. For lists of abbreviations of the first two types Hirshberg's suggestions are good. If these fail, scanning lists of serial publications even if they are not keyed to abbreviations is helpful, particularly if the list is restricted to the subject under investigation, such as the annual *Classified List of Educational Periodicals* prepared by the Educational Press Association, and the list in Crane and Patterson's *Guide to the Literature of Chemistry*. The subject arrangement of Ulrich's *Periodicals Directory* makes this useful in the same way.

For historical collections the *Union List of Collections on European History in American Libraries*, compiled by E. C. Richardson and published by the American Library Association, may be used as a key to titles beginning with such abbreviations as "Mon." (Monumenta), "Scrip." (Scriptores) and "Q." (Quellen). "Cal." in a footnote generally has reference to a calendar of manuscripts, which is a catalog with full descriptive notes, often referred to instead of the manuscript itself, since the calendar is more easily available either to the writer or to the reader and since its explicit description may be a fairly satisfactory substitute for the original. References to the calendars of the Historical Manuscripts Commission of Great Britain are perhaps more often encountered than any others, in works on early American history as well as British history and literature, but as the number of calendars of American collections of manuscripts increases they will doubtless form a larger proportion of such citations. A book founded on original manuscripts is likely to have many references both to individual documents and to notable collections, which the librarian should be on guard not to mistake for published materials.

Government Publications

References to government publications present difficulties largely because few writers know how to cite them properly and fewer readers know how to make the adjustments necessary in order to find them either in the library catalog or in printed indexes. A knowledge of cataloging rules for corporate entries and of government manuals and indexes is essential, but often insufficient, since those codes depend upon official names which may be omitted in references. Reports of many commissions and committees of all governments are often referred to, not by their long official names but by short popular nicknames taken either from the name of the chairman or the subject of the investigation; for example, the

"Rowell-Sirois Commission Report," which is the report of the Royal Commission on Dominion-Provincial Relations of Canada, and the "Monopoly Committee Report," which is a report of the United States Temporary National Economic Committee. One may expect to find cross references for these popular names in both official and library catalogs but may be disappointed. The annual index of the *United States Government Publications Monthly Catalog* does include them nowadays, but for British reports it is generally necessary to use nonofficial aids. Two lists of popular names of British reports deserve to be better known than they are: (1) Sir Angus Fletcher's in the A.L.A. *Public Documents*, 1937, pages 193-219, and (2) Appendix 8 of the *Readers' Guide to the British Library of Political and Economic Science of the London School*, 1937. Reports published since these lists were compiled may be identified through indexes to newspapers and periodicals.

Making sure that a government publication is *not* in a library which has a sizable collection of such publications is a task which should be referred always to a person who is thoroughly familiar with them; for there is a possibility that although the library may not have the edition or printing referred to, it may have another which will be just as satisfactory. If it was a publication of an administrative department of the United States government in the nineteenth century, it may have been reprinted once or twice in the Congressional edition. If it is an old document of the British Parliament, it may also have been published as an appendix to the *Journals*. If it is a publication of the Canadian government which has to do with imperial conferences of the British Commonwealth of Nations, it may have been published also by Great Britain or by one of the other Dominions. Treaties and trade agreements are published by all parties to them. One government may reprint a document originally published by another government. An American library may not have the original publication of the Ministry of Labour and National Service of Great Britain entitled *Schedule of Reserved Occupations*, and yet have Serial Number 10462 in the Congressional set, which is a reprint of the British document under the title of *Persons Exempt from Conscription in Great Britain*. How was that found? On the hypothesis that the United States government might wish to have such a document on record for its own use as a precedent, the annual index of the *Monthly Catalog* was consulted under Great Britain. Of course, it was necessary to recognize that "persons exempt from conscription" would be those of "reserved occupations."

Indexes to government publications of some countries are listed and a few of them described in Mudge's *Guide* and its supplements. A more inclusive list is that of James B. Childs of the Library of Congress.² More detailed information about the organization of the governments and the nature of their publications as well as their indexes is found for the United States federal government in *United States Government Publications* by Boyd³ and *Government Publica-*

²U. S. Library of Congress. *Government Document Bibliography in the United States and Elsewhere*, by James B. Childs (3d ed., Wash., Govt. Print. Off., 1942).

³Boyd, Anne Morris. *United States Government Publications* (2d ed., N. Y., Wilson, 1941).

tions and *Their Use* by Schmeckebier;⁴ for the state governments, in the *Manual* by Wilcox⁵ and the *Book of the States*;⁶ for Canada, in *Canadian Government Publications* by Higgins;⁷ for Great Britain, in *Brief Guide to Government Publications* by Cowell⁸ and in the article by Grace Campbell in *College and Research Libraries*.⁹ Nonofficial works, however, are not always to be trusted and wherever possible their information should be checked for possible errors and changes by means of such official guides as the *United States Government Manual*, the *Canada Yearbook*, and *H. M. Stationery Office Guide*, Part IV, "Notes on Official Publications."

However, nothing like 100 per cent efficiency can be attained by any amount of reading about government publications unless what is read is immediately illustrated and applied in the actual handling of them.

Perhaps the most important thing to learn first is how to recognize a request for a government publication which does not include the name of the government. As was shown by two of the examples of footnotes in the *Oxford History of England*, the context of the book from which the reference was obtained will often point the way. If that is not available and no department, bureau, commission or ministry is included in the reference, there may be something about the wording of the title which should arouse suspicion. The words "report, bulletin, circular, regulations" more often occur in titles of the publications of a government than elsewhere. A title which seems to indicate that the work is a report of an investigation, scientific, economic or social, may, of course, be that of a dissertation or a publication of a learned society or of an industrial or trade organization; but an awareness of the lines of research generally carried on by governments will help in recognizing such titles as originating from a government: *Origin, Birthplace, Nationality, and Language of the Canadian People*; *Mineral Deposits of Ruby-Kashwitna District, Alaska*; *Education of Evacuated School Children in Time of Emergency*; *Wind-tunnel Investigation of N.A.C.A. 23012 Airfoil with Slotted Flap and 3 Types of Auxiliary Flap*. If a reference includes a number in brackets, especially if it is preceded by C, Cd, or Cmd, e.g. [Cd2536], it is undoubtedly a "paper by command" published in the papers of the Parliament of Great Britain. These have been numbered in four consecutive series. A schedule of the dates covered by each series can be found in the article by Grace Campbell referred to before. From this schedule it can be determined which index or numerical list of the parliamentary papers should be consulted in order

⁴Schmeckebier, Lawrence F. *Government Publications and Their Use* (2d rev. ed., Washington, Brookings Institution, 1939).

⁵Wilcox, Jerome Kear. *Manual on the Use of State Publications* (Chicago, A.L.A., 1940).

⁶Council of State Governments. *Book of the States* (Chicago, The Council, 1935 ff.).

⁷Higgins, Marion Villiers. *Canadian Government Publications* (Chicago, A.L.A., 1935).

⁸Cowell, F. R. *Brief Guide to Government Publications* (London, H. M. Stationery Office, 1938).

⁹Campbell, Grace. "British Government Documents," *College and Research Libraries*, 2:355-62, September 1941.

to find what volume contains the desired paper. References to legal reports may be recognized by the practice of separating the volume number from the page number by a letter or letters, as in the footnote "1 Q.B. 671" quoted from Ensor. In American books such a citation as "301 U. S. 495" meaning *U. S. Reports*, volume 301, page 495 is more common. Any library assistant even though not skilled in the use of government and legal publications can at least suspect such titles and references as these and refer them to the proper person, department or library to locate them.

Short Literary Works

In comparison with government publications, short literary works, like magazine articles, book chapters, short stories and plays, may be somewhat harder to distinguish from book titles, but on the other hand they can generally be located more easily through better-known indexes, such as the *Readers' Guide* and the *Essay Index*. Like government publications, possible reprintings in various forms increase the probability that the library may own a copy of the work which is not cataloged. All copies of a certain nineteenth-century novel may have disappeared from the fiction shelves, but *Poole's Index* may reveal that it was also published as a serial in a magazine which is still in the periodical collection; or a library may not have the separate edition of a popular play of twenty years ago and yet have a collection of dramas which includes it and is indexed in one of the indexes to plays by Firkins or Logasa and Ver Nooy.

These are examples of the simplest kind, but the principle remains the same, whether one uses the *Readers' Guide* or the *Royal Society Catalogue of Scientific Papers* or the *Bibliographie der Deutschen Zeitschriften-literatur*. However, the searcher for an elusive title should not confine his pursuit to the well-marked trails of general indexes, but should also examine the printed catalogs of other libraries, whether in book form or on cards; for some of them have indexed serials (for example, the Peabody Institute, the Boston Athenaeum and the Surgeon-General's Office library catalogs) and others have listed many reprints from learned journals, with notes of their source (for example, the *Bibliothèque Nationale Catalogue*). Some national bibliographies also include references to papers in serials (e.g., Watt's *Bibliotheca Britannica*) or list reprints (e.g., *Catalogue général de la librairie française*). Then there are the subject bibliographies, not only those on the specific subject with which the work wanted apparently deals, but those of a broader field. Among these are the monumental basic ones like Rand's *Bibliography of Philosophy* and the *Cambridge Bibliography of English Literature*, and the comprehensive, annual ones like the *Writings on American History* and the Modern Humanities Research Association's *Annual Bibliography of English Language and Literature*, all of which are full of references to papers as well as books. Scarcely any library can have too many bibliographies, yet the staff of a library that is poorly equipped with them can often do more and better bibliographical work than it realizes by means of the bibliographies in general encyclopedias as well as in books on the subject in both the

circulation and the reference collections.

Author bibliographies are another kind of bibliography which may supply the missing information needed before the work can be located in the library. Indexes to the collected works of authors may locate a small work immediately. If bibliographical aids fail, a biography of the author, as it was pointed out in the general discussion of reference technique, may contain information which will help to locate one of his works.

Publishers' lists, not only separate catalogs, but their advertisements in newspapers and in the backs of books published by them, are sometimes sources of information about early nineteenth century American books, a period lacking adequate bibliographies.

In short, there are so many possible ways in which imperfect references may be completed and corrected that the beginner may well be too confused to know where to begin his search. Proficiency in this naturally should increase with experience, but a few hints as to possible short cuts may be welcome.

Choice of Bibliographical Aids to Use

The problem of choice among perhaps hundreds of possible books to consult first for the verification of a title appears to resolve itself into two parts, first the question of elimination and second the question of precedence. Some books may be dismissed at once as having no possibility of including the title wanted. For example, it should be perfectly obvious to anyone that it would be of no use to look in the *United States Catalog of Books in Print in 1912* for a book whose title indicates that it is about either of the World Wars. Caution is in order, however, at this point. The rule does not work both ways! One cannot assume that he will not find a book on the Civil War in the latest *Cumulative Book Index*! Ordinarily one would consult indexes to British government publications for a work by the British Ministry of Labour, but, as has been shown above, that may turn up in an index to the publications of the United States government. Neither can one draw the line between bibliographies of different forms of material, for, as has been stated, references to periodical articles may be found in catalogs of books and pamphlets; and a book, on the other hand, may have been published as a serial in a magazine and therefore may be listed in an index to periodicals. So the books which can be eliminated with absolute safety are generally restricted to those published before the work sought could possibly have been written.

This brings us to the question of precedence and may leave a very large number of possibilities from which to choose a good starting-point and succeeding guideposts. The choice naturally will depend on what is already known about the work being sought, though in libraries housing a union card catalog, the *Catalog of Books Represented by Library of Congress Printed Cards*,¹⁰ a depository of Library of Congress cards, or the British Museum Catalog, it is generally

¹⁰U. S. Library of Congress. *Catalog of Books Represented by Library of Congress Printed Cards* (Ann Arbor, Mich., Edwards, 1942 ff.). Published for the Association of Research Libraries.

routine to start any bibliographical search in one of these comprehensive lists. If only author and title are known, and these do not suggest either date or nationality, it would certainly be best to start with as comprehensive an author list as possible. In libraries where the aids noted are not available one might use the various editions of the *United States Catalog of Books in Print*, in the hope that the reference might be a book which would fall within their scope. Even though the specific work sought is not listed in these general catalogs, there may be other works listed, apparently by the same author, which would give an idea of the period in which he was writing and so lead on to the use of trade bibliographies and periodical indexes covering that period. It must be remembered, however, that this is only an hypothesis which may prove erroneous, since men of the same name—father and son, uncle and nephew, cousins—may have had similar interests and written on the same subjects at quite different periods. If the author is one for whom the library has a good comprehensive bibliography, that of course should be used at once.

Something in the form of the author's name or of the title may suggest the date of the work and the proper bibliographical aid to employ. If it is a medieval name or if the title looks "antiquated," the universal bibliographies of early books may be used to advantage: those by Brunet, Gracse, Lowndes, Pollard and Redgrave. Very long titles in English, such as were customary in the eighteenth and early nineteenth centuries, especially if they appear to deal with America, suggest such sources as Sabin and Evans.

The establishment of the date of publication is so helpful that even though the book from which the reader took the reference may not be available for examination, its author and title should be ascertained if possible, since, if its own date can be easily determined, this will fix a year before which the reference was at least first published. Once the publication date of a modern work is established or approximated, the search may well proceed directly to some bibliography, either trade or subject, covering that date. One should remember, however, that a book may be listed ahead of publication, a January publication in December of the previous year, or it may not be listed until a year or two after it was published, or the date given or first found may be that of a reprint edition. This means that if annual issues of a bibliography are being used, those of a few years earlier and later should also be consulted.

The question may be raised: How can one choose between book-trade bibliographies, pamphlet bibliographies, subject bibliographies, indexes to periodicals and indexes to government publications of the same date? It must be admitted that if only author, title and date of a publication are known, it is often hard to tell whether it is a book or a pamphlet or a magazine article, or whether it is a government or some other institutional publication. For that reason, if the subject can be determined as one in a field for which there is a good basic comprehensive bibliography supplemented by annuals, it would probably be best to consult those first, since they would include publications of all kinds. The subject index to the British Museum Catalog is often helpful. A long title on a minute

topic in the field of science is more likely to be that of a paper than a book, and unless it is obviously of this century, it might be well to skip the general catalogs and trade bibliographies and look for it first in the Royal Society's *Catalogue of Scientific Papers, 1800-1900*, or the *Index Catalogue* of the Library of the United States Surgeon-General's Office. How to recognize government publications has already been discussed. How to distinguish a short story or a play or a poem from a novel unless there is a specific subtitle is a problem as yet unsolved by the writer of this book!

Quotations

The discussion so far has been based on the supposition that the inquirer knows at least approximately either the title or the subject of the specific work which he wants, but sometimes all he knows, or thinks he knows about it, are a few words from it. The problem of finding the work under this condition is practically the same as that of verifying the original source of a quotation, either in order to elucidate its meaning by its context or to avoid mistakes in repeating it or attributing it to an author or book. Quotation books and concordances are naturally the types of books which are generally consulted first. Their manipulation presents few difficulties aside from their multitude in a large reference collection and a few idiosyncracies of arrangement and indexing. The intelligent reference librarian soon learns little tricks which facilitate their use, such as looking for the "key word" in the indexes of quotation books but for the least common words in concordances, because in the latter the sentences and phrases which contain the same word are arranged under it in the order of the works of an author instead of alphabetically by other words in the quotation, so that if one looks under a word that is much used by the author, he may have to read a column or more before he reaches the quotation he is looking for.

Whenever a quotation can be attributed to a definite author, a concordance for that author is usually preferable to general quotation books, because if the quotation is correctly remembered the concordance should surely locate it, provided it is complete both as to the works indexed and the words included. One should always make sure of the scope of a concordance before using it. Hubbell's *Concordance to Emerson*, for example, will not help in most calls for verification of quotations from Emerson because it is a concordance only to the poems (and incomplete for them) and not to the essays which are the more often quoted. *Harper's Topical Concordance*, while it has its use in helping to find Biblical texts to illustrate some topic, is not generally so reliable as the older standard concordances for the purpose of locating specific quotations, because it is not so complete and its topical arrangement may be the cause of missing a given quotation entered under a different subject than the one suggested by its wording. For example, the quotation, "Such as I have give I thee," is not listed under Gift nor any of the fifteen topics referred to under that but under Happiness. Sometimes people search for a long time in vain for a quotation that sounds Biblical because they do not realize that it is from the Apocrypha and that most Bible concord-

ances do not include the Apocryphal books. As they are often quoted, it pays to have Cruden's concordance, although for all except the Apocryphal books it is inferior to the other concordances.

If there is no concordance for the author there may be one of two other types of "author dictionaries" of a more selective scope. One is the quotation book for that author, which may be a selection of the best portions of his writings and sayings on all subjects or an attempt to bring together all his scattered passages and sayings on one subject. (*Washington, Jefferson, Lincoln, and Agriculture* is a book of this kind including three authors—an example of a "literary" reference book issued by a technical bureau of the United States government!)¹¹ This type of quotation book for an author is generally arranged alphabetically by topics and is quite likely to bear the misleading title of cyclopedia, as the *Theodore Roosevelt Cyclopedia*. The other type is the "lexicon," for example, Ramsay and Emerson's *Mark Twain Lexicon*, which deals with his own peculiar use of words and, of course, cites illustrative passages.

Other kinds of works about an author may include quotations as a side issue or incidentally; for example, Tutin's *Wordsworth Dictionary of Persons and Places* includes a selection of familiar quotations, with an index to them, and Young's *Dictionary of the Characters and Scenes in the Stories and Poems of Rudyard Kipling* contains first lines, some of which are not in the *Kipling Index*. The index to an author's collected works may be considered in this connection as a work about him, since it is generally the product of a person other than the author. Some indexes are very minute, including not only subjects but phrases. Pierrot's "Table Générale et Analytique" to the Garnier edition of Voltaire's *Oeuvres complètes* is a good example of an excellent index to a much-quoted author. But one should not stop with the index of one edition of an author's works even though it is the "best" index, for another indexer may happen to choose an entry word which fits the quotation wanted better than the first.

If none of these special indexes to an author's words and ideas are available or are productive, an examination of biographies and books on special phases of the author's life, work and character may bring to light the desired quotation. Exact reference to the letter of Booth containing the quotation used as an illustration in chapter 4 of this work can be found in Gamaliel Bradford's sketch of him in his *As God Made Them*. The stanzas by Richard Zouche containing the words, "He who directs the sparrow's tender flight" can be located in the life of Zouche in *Athenae Oxonienses*, referred to in the bibliography in *Dictionary of National Biography*.¹² Before the *Theodore Roosevelt Cyclopedia* was published, a reference to an article by him in the *Ladies' Home Journal* which contained his "reasons for going to church" was found in *Roosevelt's Religion*, a book by Reiser. This article was not reprinted in the collected edition of his works and therefore could not be found through its index. Even a book about some institution

¹¹U. S. Bureau of Agricultural Economics. *Washington, Jefferson, Lincoln, and Agriculture* (Washington, The Bureau, November 1937).

¹²Woodbine, Herbert. "Reference Libraries," *Library Association Record*, 8:92, May 1941.

connected with the author may contain a quotation from him. The source of the words attributed to the Rev. S. A. Tyng, "I have restrained more temper in half an hour than you ever did in your whole life," was found to be Henry Anstice's *History of St. George's Church*.

If, however, the author is not known to the inquirer and can neither be found through a general quotation book nor guessed from the style of the quotation, a careful scrutiny of the quotation may reveal a clue relating to its subject or circumstances. Even a peculiarity in the use of words is significant. If the quotation contains an unusual word or a more common word used in an unusual way, one may well entertain the hypothesis that some dictionary will have quoted it as an illustration. The *Oxford Dictionary* contains many more quotations than the average quotation book, having 1,827,306 quotations¹³ while the most comprehensive quotation books have less than 100,000. Most bilingual dictionaries of Greek and Latin contain so many quotations with exact references that they are better sources of information as to the location of a quotation whose original words are known than any dictionary of classical quotations. The only advantage of the latter is its author or subject arrangement, which is helpful if the quotation is in translation.

If the quotation has a proverbial sound, the reference librarian will use the books on proverbs and allusions as well as the Bible concordances. Tracing the origin of such sayings is "another story" belonging with a discussion of "firsts" rather than with the locating of specific quotations.

On the hypothesis that the quotation may be the first line or the refrain of a poem the librarian will try the books which have first-line and refrain indexes, such as *Granger's Index* and *Sears' Song Index*, and if they fail, anthologies that are not indexed in those works. On the hypothesis that a quotation ascribed to Horace Greeley and beginning "To the American boy" was a dedication a reference librarian looked in the front of each of Greeley's books and found it in his *Recollections of a Busy Life*.

The subject approach is indicated when there is uncertainty about the wording, when the quotation is known to be a translation from a foreign language, and when verbal and author approaches have failed. For this may be used quotation books with subject arrangements or indexes such as those by Hoyt and Stevenson, anthologies with classified subject arrangements, for example, Stevenson's *Home Book of Verse*, and anthologies of certain subjects, for example, Sayle's *In Praise of Music*,¹⁴ as well as books and articles on the subject. For success in this method it is necessary to keep an open and flexible mind in order to recognize relations and implications that are more or less hidden. For example, many years ago, before quotations from the following poem were included in quotation books, a reader asked for a poem she had heard read in a pulpit which contained the words, "Some of us call it autumn." Reading through a list of religious poems in the classified index of *The Speaker*, the librarian found reference to a poem

¹³*A New English Dictionary on Historical Principles*, ed. by Sir James A. H. Murray and others (Oxford, Clarendon Pr., 1928), vol. 10, part 2, preface.

¹⁴Sayle, Charles Edward. *In Praise of Music: an Anthology* (London, Stock, 1897).

entitled "Others Call It God" and saw at once that this would be a natural conclusion of the quotation. The relationship was less patent in the case of a poem which the inquirer thought was by Gilder, dealt with the concept of contrast, and contained the words, "The price of infinite wisdom is the pain and anguish of hell." The table of contents of Gilder's *Poems* listed one with the title "Compensation," which proved to be the poem wanted. Anyone who knows the meaning of compensation should be able to "translate" it into "price" and also to see the relation between contrast and compensation, and yet some people miss the connection.

Sometimes a book will include quotations on its subject on a flyleaf or in headings of chapters, unfortunately, however, as a rule without exact reference. Still, to find a quotation so printed will establish a date before which it must have been first said or written. Thus the inquirer who wanted to know the origin of the saying, "When war is declared, truth is the first casualty," could be assured, by seeing it with other quotations in a book on propaganda in the first World War, that it did not originate with the broadcaster from whom he heard it in the second war, and the reference librarian knew that he did not have to search for it as a contemporary saying.

The hardest kinds of quotations to find are those from contemporary or obscure writers and speakers, for which the verbal approach is impossible because indexes to periodicals and newspapers do not include quotable passages. Some reference librarians throughout the British Empire and the United States will doubtless remember Christmas, 1939, when they turned their libraries inside out trying to find the source of a passage quoted by the King of England in a broadcast. It had been published in a letter written to the *Times* at the start of the war by a woman who had gotten it from a Christmas card sent to her by the daughters of a man who had heard it twenty-five years before from a singer. The quotation was finally traced through newspaper correspondence to its origin in the introduction to a book of verse printed and circulated privately some years before. As Christmas cards often carry either original poems or quotations, with authors' names, a reference department might do well to collect greeting cards and file them under subject, indexing them under keywords.

Generally for such obscure quotations, if the name of the author is known, it is best to search for facts about the writer; and if these are unobtainable, then about the subject, and, from such facts as are found, to form an hypothesis as to the probable date and circumstances under which the words were first spoken or written. This method is useful also when the date is known. In finding, for example, the exact wording of Disraeli's statement in 1849 to the effect that in industry, commerce and agriculture there was no hope, it was helpful to learn from his biography in the *Dictionary of National Biography* that his speeches in Parliament of March 8 and July 2 of that year were noteworthy. The speech of July 2 which contained the above idea, expressed in a more literary style, was then found in its first edition in Hansard for that date.

Quotations are a type of question in which it is especially desirable to call in the aid of other people, for much of the success in tracing them depends upon the memory of former reading. Unless one has read very widely and has an exceptionally good verbal memory he needs to supplement his store of information with that of others. The librarian who was looking for the whole of the selection on "Why were the Saints Saints" was fortunate in having a clergyman in her family who remembered that it had been printed on a card by a certain publisher of religious books. That this need for help from outside is often felt and expressed is evident from the large proportion of questions in *Notes and Queries* and its imitators that are about quotations. Consequently indexes to these series should always be consulted before the quest is either abandoned or referred elsewhere.

Biographical Reference Questions

Relation of Biographical to Other Questions

It has been noted in the preceding section on the types of questions which one would ordinarily expect to answer by means of bibliographical tools that when this form of aid turns out to be fruitless, consultation of biographical material may provide clues. This is only one of the kinds of questions, which at first thought appear to have nothing to do with biography, but for which the reference librarian nevertheless seeks biographies.¹ The topical indexes of those biographical dictionaries whose publishers thoughtfully provide such keys reveal that *accounts of scientific discoveries and inventions, histories of business enterprises, social and political movements, educational institutions, serial publications, and even origins of place names* are examples of a few of the many types of questions which may be answered by means of the biographies of persons connected with them. What appears to be a dictionary or an encyclopedia question may in the end be answered by a biographical dictionary. These added to the many requests for information about persons for their own sake make the finding and use of biographies a large part of the reference work in most libraries. Fortunately there is an abundance of biographical material. More pages in Mudge are devoted to biography than to any other separate form of reference materials except bibliography. And the biographical works listed there do not by any means constitute all the reference materials of a biographical nature, for, as every student of reference books knows, biographical articles and data permeate almost all other forms of reference books, both general and special, and are listed in all kinds of indexes and bibliographies.¹ Yet, in spite of, and perhaps to some extent because of, the plenteousness of sources of biographical information, questions about people present many difficulties.

Identification Problems

An analysis of the problems presented by such questions may be helpful in suggesting ways of solving them. They might be classified as problems of (1) identification, (2) obscure personages, (3) disputed facts, and (4) unknown details about famous people. Problems of identification arise from the impossibility of learning from the inquirer the full name or anything more than the name, from the confusion of two or more persons of the same name, and from changes and

¹See Hirshberg, Herbert S. *Subject Guide to Reference Books* (Chicago, A.L.A., 1942).

errors in names. When these three obstacles meet in the same request, it would seem that no definitive answer can be given. Generally, however, persistent questioning will at least bring out the circumstances under which the inquirer read or heard of the name, and these will provide some clue on which to base an hypothesis. For example, if he read the name in a book on music it is likely to be that of a musician or a musicologist, though of course it may be only of some musician's relative, friend or patron. If the book is available, the librarian will look into it to see in just what way the person was referred to and whether there are any bibliographical suggestions in it.

If, however, the name remains, as it were, suspended in space and time like a speck among the thousands in a beam of light, and the common identification tools, Lippincott, Century, *Who's Who*, *Who's Who in America*, indexes of biographies, general encyclopedias and dictionaries, and their like do not include it, then an assistant would do well to "try the combined intelligence of the staff"² before starting extensive search. If, as may often happen in a library dealing with school children or even older students, the name was assigned to be reported on, the teacher should be consulted for further information if possible. If all preliminary efforts to increase the fund of known facts fail, something may be deduced from the form of the name as to nationality and even the period to which it belonged. Medieval names, for example, are generally recognizable and should suggest the consultation of Chevalier's *Repertoire des sources historiques du moyen age*. Just as the identification of a book or article may be made through a bibliography, so conversely, the identification of a person may be made through a bibliography, index, or catalog, especially a comprehensive, general bibliography like the *United States Catalog*, or a national bibliography like Sabin, or a general periodical index, or the catalog of a national or other large reference library or even of one's own library!

The reference librarian of the University of Chicago has demonstrated the biographical information to be found in, not simply through, a catalog as follows:

From the information given on catalog cards for the books an author has written or on the cards for the books about an author, it is possible to construct a rough outline of his life, which will show some of his interests, some of the organizations to which he belonged, and some of his friends, to whose writings one might go for personal comments. If the person is a writer of literature, one can tell his nationality by the Library of Congress classification number, e.g., if the number starts with the letters PR, he is English, and, if with PS, he is American. If the work is a Ph.D. thesis, one knows from the information on the card the college from which the writer got his degree, the subject, and the approximate year. If he edited any of his college publications, either graduate, undergraduate, or alumni, one can tell his college. If he has made speeches, the organization before which he made the talk indicates his affiliations—political, religious, or educational. If he has served as secretary of an association or as editor of a trade or professional journal, one can learn of his profession or his vocation. If the author has written a biography, one may know that he was probably a friend of the biographee, or possibly

²Woodbine, Herbert. "Reference Libraries," *Library Association Record*, ser 4, 5:479. September 1938.

an enemy, and one could go to other biographical material about the said author for further comments or information.³

A specific example of the reference use of a catalog in this way has already been given in the description of gathering material on Thaddeus Hyatt in chapter 4. Another example, involving a foreigner, is the answering of a request for information about Vay de Vaya, who, the inquirer had reason to believe, was a distinguished visitor to the United States in 1905. The Library of Congress catalog card contributed the fact that Monsignor Count Peter Vay de Vaya and Luskod was the author of a book about the United States published in English in 1908. The classification number in this case did not establish the nationality of the author since it was assigned from the subject of the book, but if one could recognize the language of the title "grof," used in the heading, one could deduce it. This could be absolutely determined, however, through the *Readers' Guide* from an article on his voyage to America by Vay de Vay in the *Living Age*, 1902, which also implied that he was a clergyman. From these two references it was easy to proceed to Roman Catholic directories and bibliographies for further information. In this case the date of Vay de Vaya's visit to the United States was an aid both to finding references to his book and article and to the assurance of the identification. Without this the identification could hardly have been made, since the first name was unknown by the inquirer, and Vay de Vaya is the name of an old and distinguished Hungarian family.

The positive identification of a person whose name is exactly the same as that of someone else may lead into research. Doane has pointed out the mistakes likely to occur from careless assumptions.⁴ Here the reference librarian's first duty is to collect all the material possible on the two persons so that careful comparisons of data may be made and conclusions drawn as to which is the "right man." Pedigrees help to distinguish people of the same name and family, and the librarian needs to know how to use at least the more common genealogical indexes and compendiums of Great Britain and the United States, which not only straighten out family relationships⁵ but also often supply unexpectedly important snatches of biographical information. For example, the "Lady Gerard that died at Joppa returning from a pilgrimage to Jerusalem," whose portrait Walpole mentioned in a letter of 1759 as one he had seen, is unmistakably and fully identified in Cockayne's *Complete Peerage* as Mary, the widow of Charles Gerard who died in 1707, the daughter of Sir John Webb of Odstock and granddaughter of Sir John Caryl of Harting. Cockayne records that this lady died "Sep. 1731 at Joppa, when returning from a visit to the Holy Land." A selective bibliography of the genealogical books for the beginner is to be found in Doane.

³Ver Nooy, Winifred. "The Consumer and the Catalog." In William M. Randall, ed., *The Acquisition and Cataloging of Books* (Chicago, Univ. of Chicago Pr., c1940), p. 312-13.

⁴Doane, Gilbert H. *Searching for Your Ancestors* (N. Y., McGraw-Hill, c1937); p. 198-201.

⁵Doane (*op. cit.* p. 193-98) shows the need for this in records of the seventeenth century when terms of relationships were used differently from present usage.

Varying names and forms of names are stumbling blocks to guard against. This is the reverse of the foregoing where two or more persons may have the name which has been presented for identification. Here, on the contrary, articles on the same person may be entered in various ways in different books. These differences may be merely in spelling, due to variations in methods of transliterating from other alphabets, for example, Chaykovski, Tchaikovsky, Tschaikowsky, or due to differences in linguistic or national forms of the same name, for example, Stephen, Steven, Etienne, Stepan, Estaban, Sczepan. There is also the lack of standardization of the spelling of names, especially before the nineteenth century, like the well-known variations of the spelling of Shakespeare and the thirty-four varieties of Reynolds in the first U. S. census.⁶ There is carelessness to be coped with in the spelling of such names as Bailey, Bailie, Baillie, Baley, Bayley, Baylie, Bayly. Then there are the changes of names due to marriage, elevation in rank, admission to religious orders, migration to a different country, assumption of pseudonyms, and a variety of personal reasons and whims. All these possibilities must be taken into account and all probable variations of the name kept in mind for possible use in each book consulted. Each new name discovered means going back over material already supposedly exhausted. In just one index to source materials more than a hundred years old, varieties of spelling may be found, to agree with the spellings used in the original documents.

Obscure Persons

Finding information about obscure persons is likely to lead the reference librarian into all kinds of material not generally recognized as biographical. On these "ordinary folk" the best-known biographical dictionaries will give little or no help, and the despised, "commercialized" biographical works may earn an appreciation not usually accorded them. For such persons some facts in addition to the bare name are essential in order to form any hypothesis as to where to start the search. One needs to know, at least approximately, where or what the person is or was at some time during his life—or where he was buried, for transcripts of tombstones and other cemetery records are among the aids to biographical information found usually in local or special genealogical collections. If the date of the death of the person is known or discovered, an obituary may be found which may open up a maze of avenues for search. Musgrove's index to obituaries prior to 1800 is an invaluable aid to finding biographies of Britishers whose local and contemporary fame did not suffice to secure them a place in the *Dictionary of National Biography*. Obituaries in *Appleton's Annual Cyclopaedia* and other yearbooks, the indexed newspapers, and clipping files provide a good starting point for facts about persons of all nationalities who have died since the middle of the nineteenth century, but who have not yet found, if they ever will, a place in encyclopedias and biographical dictionaries. The date when a person received some honor or appointment to an important office or performed some remarkable deed is also significant, for at that time biographical sketches of him are likely to be published in newspapers and magazines, and perhaps yearbooks.

⁶*Ibid.* p. 16.

The places where a person lived are valuable clues, for they suggest local materials in which he is more likely to receive attention than in more general reference materials. Local directories, local histories, local bibliographies, local newspapers, keys to local archival records, all are important in these searches. County histories, both the remarkable, scholarly *Victoria History of the Counties of England* and the slovenly made, commercialized "historical encyclopedias" of American counties, are excellent starting points when the place where he lived is just about all that is known of a person in the past. Old directories pay for their lodging on the shelves when they supply data on an obscure person's varying occupations and addresses, which may show the way in which his career developed and suggest various subject approaches. In directories also may be found the names and addresses of members of his family or of his business associates, who may prove to have been more important and therefore to have left memoirs and records which include some facts about the person in question. In this way, too, descendants either in family or business may be traced who can furnish information. This is the kind of question for which the librarian may very properly call for help from the library in the place in which the person lived, as that library may be expected not only to have a local collection but also to be in touch with people who have personal knowledge of the subject. An English librarian, in fact, has suggested a standard printed form to be used for interlibrary cooperation in locating people.⁷

"What a person is or was" may be interpreted as including any sort of information about him other than his name—his occupation, his hobby, his memberships and offices in educational and governmental institutions, professional, religious and social organizations, his friendships and family relationships. Even though he is not included in any of the national who's whos, he may have a reputation in his profession which will admit him into its special who's who.⁸ If he was a member of an organization with publications, it will probably have published a biographical sketch of him, at least when he died if he had not previously called attention to himself by some special activity. If he is or was an alumnus of a college his biography may appear in one of the alumni directories or periodicals. If he holds an office in his church, especially a national or provincial or diocesan or synodical position, the yearbook of his denomination will include him, as in the case of Vay de Vaya described above. Even though no additional information is found, just to see the name in print at last is a spur to lagging spirits. At least there seems to be assurance that there actually is or was somebody by that name, although unfortunately some biographies of people who never existed have crept into at least one biographical dictionary.⁹

The way in which a government directory may correct misinformation and

⁷Collison, R. L. W. "The Missing Relative," *Library Association Record*, ser. 4, 7:9-10, January 1940.

⁸An extensive list of these occupational who's whos can be found in Carter Alexander's *How to Locate Educational Information and Data* (2d ed., N. Y., Teachers College, 1941), p. 317-19.

⁹See note on Appleton's *Cyclopaedia of American Biography* in Mudge, *Reference Books of 1935-37* (Chicago, A.L.A., 1939), p. 40.

lead to further data is illustrated in a question calling for something on John L. Barry, thought by the inquirer to have been a Commissioner of Labor in New Hampshire. The state manual for New Hampshire shows that he was not Commissioner of Labor at any time, but that he served on the Interstate Compacts Affecting Labor and Industry Commission, June 28, 1935—February 1, 1938, from Manchester. From the description of the constitution of the commission in the manual it may be inferred that as he was not a member of the legislature he must have been representing labor or industry or the public. On the hypothesis that it was the first, the biennial report of the New Hampshire Bureau of Labor for 1938 was consulted, which recorded that the president of the New Hampshire State Federation of Labor was John L. Barry, 50 Conant Street, Manchester. The Manchester directory led into the identification problem of two persons with the same name by listing John L. Barry, cigar packer, and John L. Barry, Jr., laborer, at the same address! However, with this specific information as to place, it would be easy to determine by correspondence, either with the two men themselves, or with the public library, which was the one wanted.

Finding information about obscure people of the past very often leads into the consultation of old legal documents. In a library used by research workers in the fields of English and American history and English literature the reference librarians need to familiarize themselves with the guides to the Public Record Office and the Historical Manuscripts Commission publications. In the United States only a start has been made toward opening up this sort of material for reference. Inventories have been and are being made by the National Archives and the Historical Records Survey for federal and local documents respectively, but a large amount of calendaring and indexing remains to be done before as much information can be gleaned from their publications as from the British counterparts mentioned above.

Disputed Facts

Disputed facts, or errors in reference and other books, are, of course, not peculiar to biographical reference materials. As demonstrated earlier, in chapter 4, the correct information is not determined by a mere accumulation of testimonies but by an evaluation of them and by a careful checking of a variety of sources against one another. There is a popular fallacy, too, that an autobiography or a biographical sketch based on a questionnaire must be more authoritative than material gathered in any other way. A moment's thought should be enough to show that this is not necessarily so, since a person may make false statements about himself, either from a lapse of memory, which was probably the case in the biography of one of the editors of the *New Eclectic Magazine* referred to previously, or from carelessness, as in the case of the absent-minded professor who filled in contradictory dates in questionnaires for two different publications, or purposefully, as in the case of the notorious Musica, alias Coster, whose autobiographical sketch under the latter name added another American biographical dictionary whose publishers unwittingly included fiction.

Generally the attempt is made to find information whose origin is as close

as possible to the subject, in place and in time. If an American and an Italian encyclopedia, both considered authoritative works, disagree on some facts about the life of an Italian, the latter would generally be considered more likely to be right. If two American reference books of equal reputation disagree on some facts about the life of an American of the nineteenth century, one would seek some contemporary source of information, if possible by someone who had first-hand information. For example, the *Dictionary of National Biography*, the *Dictionary of American Biography*, and *Appleton's Cyclopaedia of American Biography* all three disagree as to the burial place of the Irish-American, Thomas Addis Emmet, naming respectively, "Churchyard of St. Mark's, Broadway," "St. Paul's Churchyard," and the "Marble Cemetery on Second Street." According to the book on the Emmet family by the grandson of this Thomas Addis Emmet, none of these is exactly correct, although the *Dictionary of National Biography* errs only in the name of the street. The account of the funeral published the next day in the *Morning Courier* quoted in *The Emmet Family* states that he was interred in St. Mark's churchyard. The probable reasons for the discrepancies can be inferred from the statements in *The Emmet Family* and elsewhere that a monument to Thomas Addis Emmet was raised in St. Paul's Churchyard, although his body rested elsewhere, and that his wife was buried in the Marble Cemetery in their son's vault. It is always a satisfaction if the probable sources of contradictory statements can be found in this way. This question cannot be considered as finished because nothing has been found in print to show whether his body may at some later time have been moved from St. Mark's to the Marble Cemetery. Consultation of the records of the cemeteries would probably settle the question.

However, sometimes what appear to be discrepancies prove to be merely different ways of expressing the same thing. Two books may seem to disagree on the date and place of a man's birth or death and yet both be right because they are using different calendars for the former and different nomenclature for the latter. Thus the author of one book may say that a certain Russian was born in St. Petersburg October 5, 1892, and the other that he was born in Leningrad October 17, because previous to the Soviet regime Leningrad was known as St. Petersburg and the Russians used the Julian Calendar, which in the nineteenth century differed by twelve days from the Gregorian Calendar used by most other nations. Dates in the lives of British and American persons in the first half of the eighteenth century are often given in "O.S.", i.e., "Old Style," as the Gregorian, or New Style, was not used in legal documents in Great Britain until 1752, when "the commencement of the legal year was changed from the 25th of March to the 1st of January."¹⁰ If the date occurred within the first three months of the year it might be recorded as of that year or of the previous year, as common usage to some extent preceded the legalization of the New Style.¹¹

¹⁰*Encyclopaedia Britannica* (14th ed., N. Y., Encyclopaedia Britannica, Inc., c1929), vol. 4, p. 572.

¹¹For a full account of the pitfalls connected with the calendar, see Doane, *op. cit.*, p. 188-93.

Hidden Facts about Famous People

The discovery of facts not generally known and not published in connection with some famous person comes pretty close to research. It demands careful thought, exercise of the imagination, observation of clues and ingenuity in following them in much the same manner as in building up the biography of an obscure person. For example, a writer wanted to find material about the visit to America, after the Revolution, of a distinguished Englishwoman, whose biography in *Dictionary of National Biography* merely mentions the date when she embarked for North America and her sojourn for ten days in June of the next year with Washington at Mount Vernon, and refers to three of Washington's letters to her in the Sparks edition of his *Writings* and two more letters in *Notes and Queries*. After reading these letters a start was made on the problem by an examination of Washington's *Diaries* in which were found the names of the people who were also visiting or calling at Mount Vernon while she was there and a letter of thanks from Washington to the person who introduced her to him. The published letters of that person included one thanking a third man for *his* introduction of her to the second. Altogether, through these and other books on the Washingtons, the names of nearly a dozen Americans were found whom she presumably met. If investigations of books and articles by and about these people prove to lead to an ever-widening circle of acquaintances, it would seem likely that a person with a good imagination could write a really interesting story about this early tourist, based on widely scattered but well-authenticated facts. This reference to *Notes and Queries*, it is hoped, will serve as a reminder of the usefulness of that set for biographical data as well as the location of quotations. It is especially rich in genealogical information.

This sort of problem generally has to do with people of the past and entails historical research methods. The best manuals of instruction are the books on historical methods by such writers as Langlois and Seignebos, André Morize, and Allan Nevins. What the last has said of and to the student of history might well be said of the reference librarian and to the student of reference work. Substituting "reference librarian" for "student" and "investigator," he may be quoted:

In pressing his search the [reference librarian] should cultivate the faculty of detecting facts overlooked by others, or new relationships in old facts. The mark of a gifted [reference librarian] is that he finds what he wants where others have never thought of looking, or have looked too superficially. The [reference librarian] should be watchful for any sentence that bears indirectly upon his subject, should be alert for any hint of printed or unprinted material, and should scrutinize both the text and its footnote references for what is not in them as well as what is. He should know something about manuscript collections and the guides to them, and about current bibliographical publications.¹²

¹²Reprinted from Allan Nevins, *Masters' Essays in History* (1933), p. 6, by permission of Columbia University Press.

Historical and Geographical Questions

"First Facts"

The methods of historical research as used in reference work are, of course, not confined to biographical questions. Another type of question requiring much the same sort of procedure is the quest of dates, origins and "firsts." The popularity of the last is doubtless what led to the publication of the two books by J. N. Kane¹ which, although timesavers in popular reference work, are insufficiently documented to be accepted without question by every scientifically minded seeker of facts. The establishment of a "first" has often been a matter of controversy, and even when a conclusion appears to have been reached it is quite likely to be upset by later discoveries. For example, according to Kane, the first baseball game was attributed to Colonel Abner Doubleday in 1839, but an article by Robert W. Henderson in the *New York Public Library Bulletin*, April 1939, asserts that baseball was a popular children's game in England before 1750; that it was known in America at least as early as 1762; that in England between 1800 and 1825 it became known as rounders, but in America kept the original name. The evidence, among other things, included children's books of the eighteenth century in which rules and diagrams for baseball are printed. These books were in existence, of course, when Kane's book was written, but apparently no one who was interested in the history of baseball knew about them. In fact, few people realize the value of children's books, old or new, in adult reference work. It is the reference librarian's business to recognize the potential reference value of all printed matter that comes to hand.

It might be said that the reference librarian's problems connected with questions on origins are of two kinds: the testing of a verdict found in Kane and other such reference books, and the discovery of any date at all of the first occurrence of something not mentioned in handbooks and encyclopedias. Whenever sources are cited or enough information is given to suggest them, the search for verification of handbook statements will naturally start with an examination of the sources. For example, if one starts to verify in Sabin the title and edition of the work published in 1829-33 which Kane calls the first American encyclopedia, he runs at once into the entry for an encyclopedia published in America in 1798, which, although it was only a first American edition of the *Britannica* has as much claim to be called an American encyclopedia as the one named by Kane, since

¹*Famous First Facts* (N. Y., Wilson, 1933) and *More First Facts* (N. Y., Wilson, 1935), both compiled by J. N. Kane.

the earlier one contained some new American material and the later was merely a translation of the German Brockhaus. Of course this does not constitute proof that the 1798 encyclopedia was the first American encyclopedia or the first encyclopedia published in America, for there may have been an earlier one entered in Sabin or Evans under some other word than encyclopedia, or one not entered at all in either of these two bibliographies of Americana.

As Kane points out in his introduction to *Famous First Facts*, however, answers to questions beginning, "What or when was the first . . ." may differ according to interpretation: the date of an invention may be placed at the time when the idea was conceived, when the first model was made, when the patent was applied for or when it was granted. In the field of political science, too, dates may differ because one authority quotes the date of the passage of a law and another the date when it went into effect. This ambiguity in dating results in such apparently contradictory replies as "1884" (*Encyclopedia Americana*) and "1887" (*Dictionary of American History*) to the question, "When was the use of Pearl Harbor granted to the United States?" Consultation of United States government publications reveals that the convention between the United States and Hawaii which included this question was "done . . . the 6th day of December . . . 1884" but that ratifications were not exchanged nor the convention proclaimed until November 9, 1887.² As has been already shown in connection with biographies, dates may also vary on account of the use of different calendars.

A good way to start a search for "firsts" which are not given in handbooks is to find out from dictionaries containing dated quotations when the word was found to be in print first. Sometimes one is lucky enough to find there still more definite historical information that antedates publication, as was the librarian who was asked when fly-papers were first used and found in the *Oxford Dictionary* a statement quoted from a publication of 1851 that "fly-papers came . . . into street-traffic . . . in the summer of 1848."³

Origin of Sayings

If it is the origin of a saying or phrase that is wanted it becomes a problem of tracing back sources, as when someone raised the question of the origin of "Give peace in our time" used by Chamberlain. It is probable that he adopted it from the *Book of Common Prayer*, either directly or from having heard other people more or less consciously quoting it from what they heard every Sunday in the Church of England. The question then becomes: How did it get into the Prayer Book? Histories and commentaries on the *Book of Common Prayer* tell of the "prymers" and missals out of which it was formed as the immediate sources. Thence, through bibliographies and footnotes in histories of liturgies the sentence can be traced to its use in the Mass as far back as A.D. 600. Some of the words would seem, ultimately, to come from the Bible, II Kings, xx, 19, perhaps through Ecclesiasticus which is closer to the liturgical text but of later authorship

²U. S. Congress 49-2, H.E. Doc. no. 130; and Congress 52-2, S.E. Doc. no. 77.

³Woodbine, Herbert. "Reference Libraries," *Library Association Record*, ser. 4, 7: 268, October 1940. But *Dictionary of American English* cites use of fly-paper in 1847.

than II Kings (here Cruden's concordance to the Bible proves useful).

Hunting the origin of phrases has many surprises in store since some which sound very old may turn out to be of recent origin and vice versa. "Much water has flowed under the bridge since then" sounds old, perhaps because water has been flowing under bridges for many centuries, but the *Oxford Dictionary of English Proverbs* attributes its origin to an editorial in the *London Times* of July 27, 1927 on the delay in action on the Report of the Royal Commission on Cross River Traffic of the previous December. Perhaps, however, someone will be able to prove that the editor actually was merely quoting a very pat proverb. Most people, on the other hand, would say that "Let George do it" was of very modern American origin, and yet it is a translation of a French saying which dates back to the sixteenth century. Since, according to Benham, it was specially current in America during 1914-18, it might have been brought back by the American volunteers and expeditionary force.

Places and Place Names

The origin of place names appears to fascinate a number of people. The results of research on the origin of English names are easier to find than the American because of the publications of the English Place-Name Society, the lists in Kennedy's *Bibliography of Writings on the English Language*, the Victoria history of the counties and the indexes of *Notes and Queries*. The bibliographies of American regional lists in Mudge were supplemented by a tentative mimeographed bibliography compiled by the editor of *American Speech* and distributed at the 1938 meeting of the Modern Language Association "in the hopes that additional titles will be added and sent in to the office of *American Speech*." This periodical is a current source of information on the origins of Americanisms.

The various types of reference materials which may be used in this sort of question, usually considered to be in the field of linguistics, are shown in answering the question: "What was the origin of the name, Buzoe's Grave, Australia?" The *Century Atlas* locates this on a map as being on a route labeled "Giles, 1876." The legend of the map indicates that this was an explorer's route. The index of the *Britannica* supplies the full name, "Ernest Giles, explorations." Fortunately, the library in which this question was asked had a copy of Ernest Giles' *Geographic Travels in Central Australia from 1872 to 1874*, published at Melbourne in 1875. In it Giles relates the incident of the death and burial of the late lamented Buzoe—a camel!

In starting a search for information that has to do with a place it is a good plan generally to locate it, if possible, on a map and to notice the surrounding territory and places. This is like finding out about a person's associates, for sometimes a book or article about a larger region or nearby city includes information about the less well-known place in question. The indexes of guidebooks are especially good aids for finding information on small places and scenic features.

When the question was raised of the site of the fort near Woodsville, New Hampshire, which, according to Kenneth Roberts' novel *Northward Passage*, was



built by Rogers the Ranger at the mouth of the Ammonoosuc River in 1755, an examination of a modern map showed that there is more than one river of that name in New Hampshire. The Upper Ammonoosuc empties into the Connecticut River near Northumberland, about forty miles north of Woodsville, near which the Lower Ammonoosuc joins the Connecticut. This then is a question of identification and is used here as an example of the way in which the reference librarian, unable himself to carry the problem through to a satisfactory solution, may aid the research worker. He could bring together printed materials for examination and could offer to secure photostats of manuscript maps in other libraries as well as to correspond with a chapter of the D.A.R., which placed a marker, and the editor of the *New Hampshire Guide*, which located a fort on the Upper Ammonoosuc. The materials would include Rogers' own *Journal*, which verifies the rendezvous appointed by him as the Lower Ammonoosuc but has no reference to his having ever built a fort there; Potters' *Military History of New Hampshire* in the 1865-66 *Report* of the New Hampshire Adjutant General, listed by Roberts as one of his authorities (in the limited edition of *Northwest Passage*), and other secondary sources of later date, which state that Rogers did build a fort called Fort Wentworth at the junction of (some) Ammonoosuc River with the Connecticut; McClintock's *History of New Hampshire*, which locates the fort Rogers built just south of the Upper Ammonoosuc; Grant Powers' *Historical Sketches*, 1841, telling of the remains of a fort still visible at that time near Woodsville; Charlton's *New Hampshire as It Is*, 1857, which mentions the remains of a fort erected during the Revolutionary War near the mouth of the Upper Ammonoosuc and the remains of an Indian fort on the "Little Ox Bow," near the mouth of the Lower Ammonoosuc; and a copy of the Holland map of 1784, published by the New Hampshire Geological Survey in Hitchcock's *Geology of New Hampshire*, showing Fort Wentworth on the Upper Ammonoosuc. Unfortunately, the volume containing maps of the several colonies, which Rogers is said to have proposed to issue later, apparently never was published.⁴

In many ways the problems and techniques of finding information about places resemble those concerned with persons. There are the problems of identification: the same name applied to more than one place and the several names or forms of names for the same place (who would expect to find Ngan-hoei transliterated also as Anhwei?); the problems of obscurity, the disputed facts and the unknown details about famous places. There are parallels in reference materials: gazetteers, universal and regional, in place of biographical dictionaries for quick reference and starting a search; the scattering of information about places through various types of reference works; the indexes to atlases, guidebooks, railway timetables and postal guides in place of the indexes to biographical materials; the articles and maps (instead of portraits) in newspapers, magazines and yearbooks at the time a place comes into the news prominently. There is the

⁴Rogers, Robert. *Journals*, ed. by F. B. Hough (Albany, J. Munsell's Sons, 1883), p. 12-13.

Paltsits, V. H. "Journal of Robert Rogers . . ." *New York. Public Library. Bulletin*, 37:264, April 1933.

Library of Congress, *List of Geographical Atlases*, with its analytical index of maps, instead of the *A.L.A. Portrait Index*. One form of aid for places, which has no comparable counterpart in biography, is represented by the authority lists for the spelling and sometimes the pronunciation of place names, published by the U. S. Geographic Board and the Permanent Committee on Geographical Names for British Official Use, both of which include places over the whole world.

There is the possibility of finding information about places through the biographical approach as about persons through the geographical; for example, to find the origin and meaning of the name Islip, a town on the south shore of Long Island, one may discover through the index of *Appleton's Cyclopaedia of American Biography* that William Nicolls, son of Mathias, established the estate of Islip Grange there. The biography of Mathias in the *Dictionary of American Biography* mentions the fact that his family had been in Islip, Northamptonshire, England, since the fifteenth century. Thence it is an easy step to the volume of the English Place-Name Society on Northamptonshire where there is a discussion of the meaning of the word.

Places, too, have their special subject interests through which material can be found, and the geographical approach as well as the biographical is of use in finding information about such subjects as educational and religious institutions, business, works of art, etc.

Current Information and Statistical Questions

Importance of Materials and Subject Knowledge

Now it may be objected by some reference librarians that too much stress has been laid in the foregoing on questions dealing with the past, whereas the problems of finding up-to-date information on subjects of current interest are greater both in number and difficulty. This appearance of overemphasis is due partly to the examples used, for it is an inescapable fact that by the time a question can be recorded and published in a book it inevitably deals with the past. A question which today has to be answered by means of this morning's newspaper can next year be answered by means of a yearbook. The use of current newspapers, directories, indexes and their like has been mentioned more than once. After all, it is not the methods to be used for finding current information that differ from those used for historical information—the extraction of information from the reader, the forming of hypotheses, the observation of clues, the constructive imagination, the evaluation of sources—but the materials. Instead of starting with *Famous First Facts*, one starts with *Facts on File*.¹

The main reason that questions on current events and on up-to-date technical subjects are difficult for many a general reference librarian is that he (and still more she) is ignorant of the particular sources of information. He may have several excuses. Materials may have been published so recently or so expensively or so obscurely that they have not yet been acquired and organized for use in the library. The librarian, however, may be at fault in failing to keep himself informed on current affairs and technical subjects, their terminology and their literature. As John Dewey would put it, the reference librarian's "thinking [on such questions] is irrelevant, narrow, or crude because he has not enough actual material upon which to base conclusions."

The remedy is obvious but not easy! Because of their stability it is easier to acquire and maintain adequate knowledge of books through preliminary study, either in formal courses or by self-improvement measures, than it is of newspapers, periodicals and pamphlets, which are elusive and changeable. Moreover, published indexes and bibliographies which serve as keys to the literature of the past cannot quite keep up with current literature. The reference librarian has to supplement them with homemade indexes, with organization of materials in self-

¹*Facts on File: a Weekly Synopsis of World Events* (N. Y., Person's Index, Facts on File, Inc.). *Facts on File Yearbook*, 1942f. Vols. 1 and 2, covering years 1941 and 1942, have been issued to date.

indexing files, and with his own familiarity with them. A reference librarian seen scanning newspapers and periodicals is not passing his hours in a light and frivolous manner. He is producing in his own mind rolls of films of page setups so that when a question comes on a topic on which he recalls having seen something recently, he remembers how it looked on the page and how the publication felt in his hands and what publication it is that has those characteristics, and so he can say, "Oh, yes, I saw that in *Survey* yesterday." Even if he is not lucky enough to have seen the exact information, he knows enough about such publications to be able to make a good guess as to which one is likely to contain it. But of course, it is impossible for any one person to scan all current publications in anything but a very narrow field. Subject specialization is highly desirable for the most efficient handling of reference questions on current topics. The librarian in the smaller nonspecialized library or reference department, however, can help himself to a good start by means of certain bibliographical aids. When his own starter goes back on a driver, if he can get someone to give him an initial push he can then continue on his own power.

Take, for example, questions calling for statistics, one of the types which are likely to "cause complete paralysis in the brain of the reference assistant."² Although the calls for statistics are by no means all for recent data, yet it is the current statistical information which generally is the hardest to find.

Reasons for Difficulty of Statistical Questions

Statistical questions are difficult for a number of reasons. Their answers usually come in a form which is hard to secure, understand, identify and evaluate. Often the material needed to answer a single question is scattered so that one part will be found in one publication and others in other publications, and the parts do not always fit together because of differences in bases or coverage or units of measurement, even in the same series. For example, in trying to find statistics on the monetary value of production of some commodity in various countries, if one goes back to sources, that is, to the publications of respective countries, he will find different units of value on account of the various monetary systems. Then, the sources of current statistical information are often hard to find because they are either in serial publications, unindexed periodicals, newspapers, and government bulletins, or are of the kind known as "fugitive materials," mimeographed press releases and services.

Even though the library staff has been alert to secure the proper materials and ingenious in organizing them for use, there is still likelihood of some reader wanting more up-to-date statistics than have been published. People also want statistics "broken down" differently from the way the compilers have published them. They want them by age and county when they have been given by sex and state, or they want consumption when only production and export statistics are available. These demands, when really serious, are of the kind for which the ref-

²French, Randall. Review of *Business Magazines*, by Marian C. Manley, *Library Quarterly*, 3:446, October 1933.

erence librarian must be prepared to locate materials outside his library. It is always possible that the agency which collected and published the statistics on the subject wanted, but not "broken down" as the reader would like them, has on file the figures needed and would be more than willing to make them available to the research worker.

It is true that to meet all these difficulties fully and easily the librarian really needs specialized knowledge of the literature of the subject. The person who is so expert in finding business statistics that he would readily find "monthly retail statistics in men's wear clothing stores covering a sufficient period to indicate a monthly sales trend throughout the year" might have considerable trouble in finding the number of boys in classes giving industrial training for defense, or the population of departments in France by age and sex, or "how many wing beats the hummingbird makes a second when flying."

Besides his own ignorance of the subject and its "fugitive" literature, the librarian in the smaller, non-subject-departmentalized library often has to cope with the ignorance about statistics of the persons who ask for them. They are unable to use them expressed in technical terms, they don't know what an "index number" is, and what is meant by "average deviation." They lack appreciation of the problems of gathering, tabulating and publishing statistics so that they ask for the impossible, like the grateful and trusting reader in the English library who, after having been given an estimate of the number of cyclists in England and Wales from *Every Cyclist's Handbook*, asked, "Now, would you mind telling me how many miles they rode last year?"³ There is, also, the American who wanted to know the number of miles the average housewife walks per day. However, such inquirers are usually satisfied with an estimate that can be dug out of a more or less popular magazine article on the subject, as was, presumably, the person who asked, "How many men shave in America?" when the reference librarian gave the information from *Business Week* that "about 31 million Americans face their mirrors every morning and reach for some type of razor." To find this "statistic" the librarian had to supply his own cross reference, "Shaving, see also Razor blades" since the article was listed in *Industrial Arts Index* under razor blades.

Such mental cross references are often needed in reference work. In statistical questions it is more often a cross reference from the smaller to the broader topic than vice versa that is needed. For example, to find the number of deaths from appendicitis in the United States one looks in the U. S. Census Bureau, *Vital Statistics*, under diseases of the digestive system. Most compilations of statistics are classified rather than alphabetical in arrangement, an additional reason why they are difficult for the average alphabetically-minded American to find. The problem is further complicated when changes are made in the classification in the midst of a serial publication.

In answering requests for statistics the preliminary interview with the in-

³Woodbine, Herbert. "Reference Libraries," *Library Association Record*, ser. 4, 4: 120, March 1937.

quirer is especially important. First, the librarian must find out how accurate the information must be—will a rough estimate do? In that case one of the compilations of statistics or an article on the subject found in a reference book, periodical or textbook through the ordinary means is likely to contain satisfactory information. Second, he must ascertain just what is wanted. Ambiguous terms must be defined; for example, if statistics of the twenty-five largest reference departments are asked for, what standard of size is intended—the community, the library, the reference staff, the collection or the number of questions answered daily? Third, he must know how the inquirer wants his statistics broken down or classified: by year or month or week or *status quo* at a given date; by what unit of measure, value (dollars' worth) or quantity (bushels, tons); by what geographic unit, world, country, state or county; by what grouping, age, sex or race.

Evaluation of Statistical Sources

If as accurate statistics as possible are wanted for serious research or practical use, it is important to trace back to the original publication. First, it is more accurate (typographical errors in figures may creep into statistics reprinted in magazine articles, reference books and other secondary materials). Second, it is likely to be more complete and more detailed. (For example, comparing the statistics of church members in the *World Almanac* with those in the U. S. Census Bureau, *Religious Bodies*, one finds that the former gives totals for ten denominations in eighty-six cities, while the latter includes over sixty denominations in about three hundred cities and also distinguishes between different bodies of Methodists, Lutherans, etc., and between adult membership and members under thirteen years of age.) Third, in the original publication there are likely to be notes explaining how the statistics were gathered and compiled, which may affect the use that can be made of them. (For example, in *Religious Bodies* one finds notes that the statistics include only the organizations that reported and that "membership" is according to the definition of the particular denomination, which very decidedly affects their comparability for some purposes, since the "base" is so variable.)

The chief use of secondary compilations of statistics in aid of research is bibliographical, whenever they give the original source of their tables, as do the *Statistical Yearbook of the League of Nations*, the *World Almanac*, and the *Statistical Abstract of the United States*.⁴ These last two compilations serve as the most general indexes to statistics of the United States, in publications not only of the federal government but of some state governments and research agencies.

This country lacks the minute statistical index to its government publications that Great Britain has in its *Guide to Current Official Statistics* issued by the Permanent Consultative Committee on Official Statistics. It is therefore necessary to depend on guides to statistical materials and subject indexes to all kinds of materials. A knowledge of the publications of the U. S. Census and the few keys

⁴*Statesman's Yearbook*, the best known annual compendium of world statistics, is not so convenient for this purpose because, although it has a bibliography of official and non-official sources for each country, it does not indicate the source of each table.

to their contents is, of course, fundamental, but the Census Bureau is by no means the only governmental source of statistics. A general guide, not an index, to current United States statistics is the *Statistical Services and Activities of the U. S.* prepared (and preissued as a pamphlet in 1940) by the U. S. Central Statistical Board for the compendium of statistical services of the Western Hemisphere, which was published in 1941 under the title of *Statistical Activities of the American Nations, 1940*. Available, surely, to all librarians is the February, 1942, number of the *Wilson Library Bulletin*, which contains a series of authoritative but nontechnical articles on the statistical services of the United States government. If it is necessary to trace back statistics over a long period of years, Schmeckebier's *Statistical Work of the National Government* will show the different bureaus and series necessary to consult at different times. Chapters of the American Statistical Association published in 1941 indexes to statistical data in the publications of the states of New York and Pennsylvania. These statistical guides, added to the general government manuals and the specialized indexes like *Public Affairs Information Service Bulletin* and *Industrial Arts Index*, point the way to probable official sources of many statistics, but a knowledge of the organization of the government, especially an understanding of the respective spheres of authority of the federal, state and local units, is certainly a great help!

In each field of knowledge there are private research agencies which are either publishers or repositories of statistics. Consequently, if no government agency appears to have issued the needed statistics and no lead has been discovered either in compendiums of statistics or books and articles on the subject, some thought given to the field or fields of research to which the information wanted would seem to belong, followed by consultation of the directories and bibliographies in those fields, should result in a list of agencies likely to have the wanted data, published or unpublished.

In the field of business and economics there are many indexes and bibliographies which aid in finding statistics. Perhaps the best advice to give the beginner and nonspecialist in business statistics is to keep an eye on the Special Libraries Association and the United States Bureau of Foreign and Domestic Commerce for such bibliographical publications as the association's *Guides to Business Facts and Figures* and the bureau's *Sources of Regional and Local Current Business Statistics*. The former work is especially good as a "starter" on account of its bibliography of indexes and its indication of magazines which have annual statistical summaries. The latter is a still more specialized, minute, and comprehensive index to governmental and nongovernmental, secondary as well as primary, sources of business statistics, broken down into small geographical areas. The bureau's *Survey of Current Business* is a monthly compilation of statistics, giving sources, which serves as a current index for business as the *Statistical Abstract* does as a more general annual index. Guides to statistics in other fields are not so plentiful. There is need for more such special aids as the chapter on "Statistics Needed for Educators" in Carter Alexander's *How to Locate Educational Information and Data*.

Unless the librarian is a subject specialist and has had some training in statistics he cannot expect to be of much service in the evaluation of statistical information. Harry Jerome's article on "The Librarian and Statistical Research"⁵ includes tests to be applied to series of statistics, some of which the bibliographical as well as the statistical expert should be able to apply. Among the tests included are: the question of bias, the change of authorities collecting and publishing the data and of the base or classification used. He may be called on to help decide between two authorities apparently in conflict. As in the case of discrepancies in dates, discrepancies in statistics gathered by two different agencies may be explained in such a way as to invalidate neither. Simple examples given by Headicar in a speech before the Association of Special Libraries and Information Bureaux in 1935 are as follows:

Frequently it will be found that the figures of the exports from one country in a given year do not agree with those given in the publication of the importing country. . . . There may be various reasons, such as difference in categories of classification or methods of determination. Frequently it happens that goods exported from one country in December do not reach the importing country until January and will appear in the 1934 figures of the first-named and in the 1935 figures of the latter. Note also that the translation of weights and measures as given in some official publications is merely approximate. For instance, a "doppelzentner" has often been given in our statistical abstracts as "2 cwts." whereas in reality it represents 220.4 lbs.⁶

It appears, then, that in answering questions calling for current information the same principles and methods outlined in the chapters at the beginning of this section apply as for historical information. The first requisite is a satisfactory interview with the inquirer in order to form a clear picture of what he really wants and can use. The second is a rapid mental review and selection of the materials known to the librarian which he assumes may either contain the information itself or serve as aids to finding it. Next comes the testing of the hypotheses through actual examination of the material, with a mind open to suggestions from the additional facts found on the subject, by which new choices of materials to consult may be made. Finally, the reference librarian may have to weigh and reconcile conflicting authorities. If he lacks either the personal appreciation of the inquirer's needs or the necessary printed materials and a knowledge of their possibilities, he is likely to fail, since these are the foundations on which he must build his work.

⁵Jerome, Harry. "The Librarian and Statistical Research," *Special Libraries*, 16:84, March 1925.

⁶Association of Special Libraries and Information Bureaux. *Proceedings of the Twelfth Conference, 1935* (London, The Association, 1935), p. 80.

III
SELECTION OF REFERENCE
MATERIALS

Principles of Selection of Materials Especially for Reference Use

Use of the Whole Library Collection for the Informational Needs of the Community

Although a good reference librarian can answer many questions from one shelf-full of reference books plus a vertical file, no one will make the claim that the entire library collection is unnecessary for his work. Probably no library exists that always and completely satisfies the mere reference needs of its users to say nothing of other needs. Even in the largest libraries the reference librarians come to a blank wall now and then for the lack of a book which they feel sure would contain the information they are seeking. If there is time to climb over the wall into some other library it does not matter so much, but sometimes the information is required within the hour and the next library is many miles away. It is evident, then, that one of the chief interests of the reference librarian is the selection for possible reference use of materials throughout the whole library collection and not merely in the reference room.

Since there are already standard texts on book selection for libraries, a mere repetition of the principles and methods to be found in them should be unnecessary, but it may not be amiss to emphasize here the reference librarian's point of view in this matter, which is somewhat different from the readers adviser's. Ignoring for the present the readers advisory work that many reference librarians do in addition to their own specialty of supplying information, we may confine the discussion to the questions: What special applications and emphases of the general principles of book selection do librarians need to make in selecting materials for reference purposes, and what special principles do they need to add?

That they see the obligation to meet the particular needs of their own library should go without saying, but what they are especially concerned with are the informational rather than the inspirational or recreational needs. Whether educational demands are made on the reference librarian, or the readers adviser, or both, depends partly upon the type and organization of the library and partly on what one conceives to be the distinction between informational and educational needs, a distinction which is hard to make. Reference librarians in the public library therefore are vitally interested in community surveys which reveal the activities and interests of the library's clientele, both actual and potential. Reference librarians in the educational library, whether elementary, secondary or higher, will find out all they can about the curriculum, extracurricular activities of the students, and teaching methods and research fields of the instructors.

Reference librarians in the special library will inform themselves of the purpose and interests of the institution or firm for which their library exists and of the special requirements of its members or employees. In the course of such a survey, and continually in contacts with organizations and individuals both within and without the library, the reference department should be compiling a directory of specialists and experts on whom it may call for advice on book selection as well as for information not available in the library.¹

Study of Questions Asked

In addition to this survey of the environment of their library the reference librarians will make a continuous study of the questions asked, not only in order to determine the kinds and subjects of information most often wanted, but also to discover the inadequacies of the library collection. A record of unanswered questions is fully as important as one of answered questions, because failures reveal deficiencies which should be supplied through selecting additional materials. Also, in addition to the survey of the library's clientele, the librarians will plot, mentally or on paper, in ever widening circles the libraries and other information-providing agencies on which they may depend for materials not in their own libraries, and will if possible enter into cooperative plans with neighboring libraries for mutual complementing and supplementing of reference materials.

The reference librarian must not only know the capacities and needs of his clientele, but he must recognize the corresponding differences in the reference materials required to answer their questions. Perhaps the most fundamental distinction that should be drawn is that existing between the materials suitable for the use of the layman, the beginning student, the practitioner, and the theoretical specialist or research worker. For the first three groups secondary materials are as a rule preferred. The kind will depend upon the mental age, education, experience and purpose of the persons to be served. The skilled practitioner in whatever field, familiar with the vocabulary of his occupation, can read articles in a diction too technical for the layman to follow. He will prefer an explanation of a process in a technical handbook in his field, while the layman must have a simple explanation such as is found in one of the general encyclopedias. The library of a university with a college of engineering or the technical department of a public library will secure engineering handbooks, textbooks, trade catalogs, and other materials peculiar to that field. The nontechnical high school or the rural public library in answering questions on engineering subjects, will have to depend chiefly upon such general reference books as *Compton's* or the *Americana*, which, of course, would be scorned by the engineering college student or the man from the factory. The research workers in the humanities and the social sciences demand primary sources, such as documents and contemporary records, published or unpublished, and the research workers in the natural sciences want

¹For an example of the organization of a group of advisers, see Bedinger, Margery. "A Technical Library Should Penetrate the Community," *Library Journal*, 67:195-98, March 1942.

the records of original research made by their predecessors in their fields.² Bibliographical aids to finding these kinds of material, including indexes and abstracting services, are the types of books most needed for reference work in aid of research.

Importance of Bibliographical Tools

This is not to say that bibliographical tools are of great importance only in connection with research and primary materials, but simply that a good collection of bibliographies, abstracts and indexes is absolutely essential for this type of reference work. However, although it is possible to find the answers to many other kinds of reference questions through direct approach to secondary materials, often the process of finding the information could be hastened by the use of indexes, and a greater quantity and variety of materials could be brought to light either within or without the library. It is a fallacy to judge a library's use for an index or bibliography solely by the amount of material indexed that the library owns. Not only is the possibility of borrowing from another library, or of having a copy made by it, increased by the ability to cite a specific reference that is wanted, but the index may reveal materials hidden but actually at hand. More than one librarian has been chagrined at having a request for an interlibrary loan turned back with the information that the article wanted was in a publication in his own library. A pleasanter experience is that of the librarian in a public library who through the use of the *Industrial Arts Index* found a reference to an article on a certain safety device in a technical journal not subscribed to by the library but on file in the inquirer's own office. In addition to their direct reference use bibliographies are among the most important aids to the selection of reference materials for acquisition and therefore are basic tools for the reference department.

Although bibliographical aids, including the library's own card catalog, are of the first importance in reference work, and often contain within themselves useful information, their value is of course enhanced if the library contains the materials indexed: periodicals and newspapers, government publications, books containing pictures and maps, "circulating books," particularly those indexed under subject in the *Essay Index*. To these must be added materials not necessarily indexed nor cataloged but approachable through some sort of self-indexing organization in the library: pamphlets, clippings, separate pictures and maps, slides, records, directories of all kinds, college catalogs, trade catalogs, dissertations, manuscripts. In short, there is no class of material in which the reference librarian is not interested as a possible source of information.

²For differences of opinion in regard to the need of a "search of the literature" by the scientist, see the following:

Shaw, Ralph R. "The Research Worker's Approach to Books—the Scientist." In William M. Randall, ed., *The Acquisition and Cataloging of Books* (Chicago, Univ. of Chicago Pr., 1940), p. 284ff.

Wallace, L. W. "The Library and Liberation," *Special Libraries*, 1:243-45, July-August 1940.

Bauer, H. C. "The Midnight Oil Has Already Been Burned," *Wilson Library Bulletin*, 16:832-33, 837, June 1942.

Variations in Types of Materials Needed for Different Communities

Not all libraries will possess or need all the above types of material. Emphasis will vary according to the reference demands. If the library caters to people interested in business or public administration, the reference department must see to it that the library builds up a strong collection of government publications, of statistical compilations, of "services," of directories, of maps, of periodicals and indexes in those fields. If it is trying to meet the needs of school teachers, the collection of pictures and other illustrative materials should be strong. If it numbers trade school students and men in manufacturing industries among those who call upon the library for information it will need technical handbooks, trade catalogs, etc. But these are largely matters of specialization and it is only in the beginning of such a trend in interests in a general library that the general reference librarian will have to start the foundations of specialization by means of a study of bibliographies, especially of the "guide to literature" variety, e.g., Crane and Patterson's *Guide to the Literature of Chemistry*, and of books and articles written by special librarians, such as Manley's *Business and the Public Library*,³ the manual for science and technology libraries projected by the Special Libraries Association, and the articles in *Special Libraries*.

Criteria for Selection of Books for Reference Purposes

Turning from the consideration of the *types* of materials needed for the reference work of his particular library, the reference librarian has next to pay attention to the selection of individual books, both within and without his specific jurisdiction. While all printed materials have potential reference value—the reference librarian who was asked to find an example of a literary description of a battle went to the fiction shelves for a copy of *Les Miserables*, and, as described in a previous chapter, evidence that baseball was played in the eighteenth century was found in children's books—still the evaluation of a book for reference purposes generally depends upon somewhat different criteria from those used in selecting books for reading. For example, an anthology for the "browsing room" of a college library would be chosen for the quality of its selections and the attractiveness of its physical make-up, but the anthology for the reference room should be chosen for its comprehensiveness and the adequacy of its indexes; the kind of well written impressionistic book of travel which a librarian would advise a person to read in preparation for or in lieu of a vacation trip would not be so useful generally for factual information as a compact, dry-as-dust guidebook. Readability is an asset in reference books, as in all books, but if a choice *has* to be made between that and accuracy, it is accuracy every time for the conscientious reference librarian. Any visiting reference librarian will take pleasure, provided he is free from covetousness, in the splendor of a room full of newly purchased reference books in a recently opened branch library, but back in his own library he will cherish a dingy old *Dictionary of American Biography* more highly than the

³Manley, Marian C. *Business and the Public Library* (N. Y., Special Libraries Assoc., 1940).

gift horse of a brightly bound "Biographical Cyclopaedia of American Politicians," full of sumptuous portraits. (Any resemblance in the latter title to that of any actual book is purely accidental!)

The reference librarian will have his list of criteria similar to the list of tests for nonfiction in Haines' *Living with Books*,⁴ but his attention will be centered on questions of scope and authority, kind of presentation, arrangement, indexing, and physical features rather than on literary and psychological qualities. Style of writing matters little, provided it is simple, clear and has the "elegant conciseness" which transforms condensation into terseness.

Need for Regular Allocation of Funds for Reference Purposes

In addition to the general principles already discussed with their special implications and interpretations, there are two special principles or policies to be observed in a library for the maintenance of an efficient reference collection. The first is the need for a definite minimum allocation in the annual library budget for the upkeep of the reference collection, even in the smallest library. A reference collection that receives no regular sustenance will die just as surely as any biological entity, but too often in libraries operating on a limited budget this is likely to be overlooked. Provision should be made (1) for subscriptions to whatever current indexes, bibliographies and services are found to be needed for reference work in that particular library, (2) for the purchase of yearbooks at regular intervals (not in every case nor in every library necessarily every year), and (3) for the purchase of new books to replace worn-out books or to supplant or supplement those that are all the time becoming obsolete so far as the reference work in that library is concerned. (For some purposes no reference book is ever completely obsolete, and therefore all are kept in the largest libraries.)

Balancing Collection for Points of View

The other principle on which the formation and growth of a reference collection should be based is the maintenance of balance. This does not refer to subject, for the relative proportion of reference books on the various subjects depends on several factors: (1) the specialties of the library and its clientele; (2) the proper proportion of reference books to other materials in a given subject (science, for example, requiring a very small proportion of reference books in comparison with journals); and (3) the reference books available in a subject (religion, for example, being very much better equipped with extensive and valuable encyclopedias than art). The balance to be maintained is rather between points of view and between different kinds of presentation and arrangement of materials. For example, the first atlas an American library would buy would naturally be one made in the United States; but if there seems to be need for an additional general atlas, then, unless the demand for the kind of information to be found in atlases is quite exclusively on the United States, it would be better to buy one produced on another continent because it would supply more abundant and more accurate

⁴Haines, Helen E. *Living with Books* (N. Y., Columbia Univ. Pr., 1935), p. 46.

information on other parts of the world than another American atlas. If, on the other hand, the demand makes it seem best to buy another American atlas, then, instead of duplicating the one already on hand, it would be better to buy one by another publisher in order to benefit from different maps and indexing.

In buying synonym dictionaries the librarian should plan for the different kinds of use and of approach likely to be wanted. If he can afford only two, instead of buying two whose purpose is the careful discrimination between a few synonyms, he would buy one of those and one of the thesaurus variety which suggests a great many ways of expressing an idea, but without discrimination. If he buys only one thesaurus he will get the traditional Roget rather than March because the former through its classified arrangement of ideas and alphabetical index of words provides two avenues of approach to suggestions for enrichment of a person's vocabulary. Although most Americans are wedded to the alphabetical arrangement of reference books, there are some people and some questions for which a classified arrangement is more desirable. The section of classified illustrations in the back of the first edition of *Webster's New International Dictionary* duplicated some of the illustrations scattered through the dictionary, but its omission from the later edition was nevertheless a loss from the point of view of the reference librarian, who found it handy for people who knew what an object looked like and what it was for, or to what group of objects it belonged, but wanted to know its name. So it is a good principle in forming a collection of reference books on a subject, as far as possible, to represent various types and arrangements: an encyclopedia or dictionary with small topics for quick reference, a handbook or manual for the approach under broader subjects, a history for the chronological arrangement, a biographical dictionary for the personal approach, and so on.

Summing up, then, the principles to be observed in building a collection for reference use: (1) provision should be made for meeting the reference needs of the library's own clientele through surveys both of the community and of the questions asked and through discrimination in the kinds of materials to be chosen; (2) the reference resources of the region should be taken into consideration; (3) a good foundation of bibliographical tools should be laid; (4) the reference librarian should have a part in the selection of materials for both acquisition and discarding throughout the library collection and should remember that nothing printed is foreign to reference purposes; (5) points of reference value should be considered of more importance for this particular work than literary style or readability; (6) some funds should be set aside continuously for reference materials; (7) the reference collection should be developed systematically in order to provide as many different kinds of approach to information as possible.

Reference Works and Aids

"R" Books

Although the whole of a library in one sense constitutes the working collection of the reference department, usually certain materials, recognized as having value solely or chiefly for reference purposes as distinct from the other purposes for which many libraries exist, are set apart as the "reference collection," restricted from circulation, and under the control of the reference department in libraries so organized. Even in "reference libraries" from which no books circulate and in special libraries or reading rooms it is generally found advisable to bring together in some place for convenient consultation these "R" books, which were created for the express purpose of being referred to for specific information. Roughly speaking, they may be divided into two main classes: compendiums of one kind or another, which furnish the information directly, and bibliographical aids, which merely indicate places in which the information may be found. In practical use this distinction becomes blurred because books of the first type often refer to others for fuller information and those of the second type are for some questions self-sufficient; that is, one may use an encyclopedia or manual or reference history merely as a clue to other books, and one may use an index or a bibliography for the information it supplies in regard to authorship, dates, prices and so forth; but for book selection the two types may well be kept in mind, as the criteria for their evaluation differ in some respects.

Since reference works do have this single purpose and not the several purposes which other library materials may serve and, moreover, are generally more expensive than other books, it is proper that especial care should be exercised in their selection. Granting the need in the specific library for a new reference work of the type, scope and arrangement of a book under consideration for purchase, there still remains the obligation to make sure that this particular book is worth its price and the space it would fill in the reference collection. There are books whose authority is unquestioned and usefulness safely predictable on account of their source, for example, certain government publications, but unless a book belongs in this category someone should make a careful examination of it before it is purchased. Of many older reference works "someone" has already made a careful investigation and published a report in one of the special guides to reference books to be hereafter described, but in the case of a new work or new edition on the market, it may be necessary for the reference librarian to make a decision before such reports are published and therefore to make or direct his

own investigation. If this is to be trustworthy it will take time and skill. It cannot be done while a book agent waits in the library or goes out to lunch. The more he presses for an immediate decision the less likely it is that his book can pass the tests it should. }

Examination of a New Reference Work

The thorough examination which a reference librarian should make of an expensive and extensive new reference work consists of more than reading the title page and preface and dipping into the text here and there to see whether it is accurate and up to date in its statements on subjects with which the examiner is familiar. This superficial kind of survey may do for a review in a general book-reviewing periodical but not for the librarian who is responsible for spending funds. Reference books which are highly recommended by a professional reviewer do not always come out with such flying colors from the scrutiny of either the reference librarian or the subject specialist.

Two of the most important things the reference librarian wants to know about a reference work before purchasing it are: How reliable is it? What information or what approach to information does it afford, *different* from other reference books, particularly those already in the reference collection? Its reliability depends not only upon its authority, accuracy and completeness, but also upon its balance and proportion and its organization and consistency.

Testing for authority involves, first, investigation into the qualifications of those who planned it, wrote it, prepared it for publication, and published it. For some reference works this consists merely of verification of the information that the book itself or the publisher's prospectus gives about the people responsible for these various functions, but for some others this means identification of editors and writers, whose names only are given, as well as the discovery of their special qualifications. This calls for the skills described in the section of the chapter on handling reference questions which deals with the reference questions on biography, especially of obscure people of the present. In a reference work containing signed articles, it may involve also compiling lists or statistics of them with their authors to ascertain whether practically all were written by authorities or only a few outstanding ones were by authorities and the rest by one or two persons. A statistical count of this kind for a certain "scholarly" encyclopedia of a subject, for example, revealed that, whereas more than one-half of the contributors wrote less than four articles apiece, one man alone wrote between forty and fifty per cent of the articles, on a great variety of topics. It is only fair to state that this may not represent any different balance between authority and versatility from that found in the usual reference work. There is no study, so far as the writer knows, of the "proper" or even the customary proportions of authorities and hack-writers in reference books. Presumably the editors of many extensive standard works find it necessary from a practical standpoint to employ the latter for a goodly number of less important articles. However, since the above proportion was found in a very reputable work, it might perhaps be concluded that a work

in which less than one-half of the articles were written by one man and the rest by specialists had some claim to authority, in so far as specialization of authorship is an indication of authority.

To merit the trust of its users a reference work should "tell the truth, the whole truth and nothing but the truth." In judging an extensive reference work for accuracy it is manifestly unfair and unsafe to depend upon sampling based on one person's specialties. Either that one person should supplement his knowledge by some really sound bibliographical research in connection with articles outside his own immediate field or else he should call for the cooperation of several other people with a variety of specialties. Actually nothing short of a combination of these methods is entirely trustworthy. Verification of information should not be based merely on other reference works but should go back to primary sources, since, as has already been shown, reference works are very likely to copy either from one another or from a common source, so that unanimity or the lack of it in them is not necessarily a criterion of accuracy.

The demand for the "whole truth" in a reference work of course does not mean that it is expected to include articles or references to articles on everything known on a subject, unless its publishers or editors make such a claim for it, but that none of the topics which could reasonably be expected in a work of its size and scope are omitted and that important data are not left out of the articles. Therefore, a careful reading of the title and the preface should precede the examination for completeness. This is a point at which the subject specialist sometimes fails, as he is apt to judge a book from his own point of view and not from that of the persons who planned it or for whom it was intended. The reference librarian, having in mind the varied needs and capacities of the general public, is more likely to be fair-minded and to judge the book according to its claims and probable usefulness. To be sure, the specialist in the subject who has in his head a large fund of information on the subject and a more or less well-organized scheme of the topics comprehended by it can more easily discover omissions. However, in most subjects the reference librarian, even though not a subject specialist, through his experience knows what topics are often asked for and can by scanning other reference books and articles on the specific subject discover other topics to use in testing. Usually the chief interest is in omissions of recent developments in the field. Yearbooks and periodical indexes suggest topics for these and also provide material for comparison with the articles in the book. If there is another similar reference book already in the library, it can serve as a basis of comparison by means of page by page, entry by entry checking.

A reference work may be authoritative, accurate and complete within reason and yet not be one on which a reference librarian feels that his department can rely, if it is poorly balanced. The habitual user of books, such as a member of a reference department, decides upon the reference book to consult for a given question very largely on the basis of his previous experience with that book, and if its content is badly proportioned he is likely to have gotten a misconception of its usefulness unless he has made a great many attempts to consult it. Reference works in several volumes are quite likely to devote a disproportionate amount of

space to the subjects treated in the earlier volumes. It may be recalled by those who are familiar with the history of the *Encyclopaedia Britannica*, that in the first edition, which was rushed to print, the first volume contained only the first two letters of the alphabet, the second volume included the next ten letters, and the third volume encompassed the rest of the alphabet. Though the first volume had fewer pages than the others, the middle of the total number of pages of the whole work came in "Ch." To allow for differences in subjects an alphabetical work on a subject should be compared, not with a general encyclopedia or dictionary, but with other works of a similar nature and arrangement in the same field. An encyclopedia of photography under examination appeared to be very badly proportioned, since it devoted an equal number of pages to the letters "A-Ep" and "Ex-Z" respectively when "I" is the dividing point in the three standard general encyclopedias in the English language; but examination of two other encyclopedias of photography and a glossary of the subject showed that the dividing point in these works was "G" or the first part of "H." So, although the new encyclopedia was somewhat overbalanced toward the beginning of the alphabet, it was not quite so badly out of proportion as appeared at first.

Counting articles or entries according to some appropriate classification is one way to reveal any form of bias which affects proportion. For example, by this method the suspected national bias of Colles' *Supplement to Grove's Dictionary of Music* is substantiated, since 20 per cent of the biographical articles are on British natives (other percentages for the major countries ranging from 12 per cent on Germans to 4 per cent on natives of the United States) and more than 60 per cent of the articles on musical societies are on British organizations. Other ways of discovering bias include observation of the vocabulary used, the treatment of subjects, and the nationality or other classification, religious or political as the case may be, of the contributors.

The reliability of a reference work from a practical point of view is also affected by the organization of the materials, especially in regard to the choice of headings and the system of indexing and cross references. A poor heading may be partly compensated for if references can be found to it under other words either in the body of the work or its index. The examination of a reference book for organization may start with a careful comparison of an adequate sampling of cross references and of references in the index with the entries to which they refer, to see whether they actually lead to what they are supposed to. Second, a list of possible synonyms for main headings may be compiled and an analysis made of a number of articles in order to select additional headings for which cross references in the text or entries in the index might be expected. A study of the index, especially of a nonalphabetical work, should be made with J. E. Elliott's article on "Making and Evaluating an Index" in mind.¹ In an alphabetical work the entries in several parts of the alphabet should be tested for consistency. A reference work in which two different methods of alphabetizing have been used (for example, "Art in photography, Art terms, Artificial," and "Back focus, Back-

¹Elliott, J. E. "Making and Evaluating an Index," *Subscription Books Bulletin*, 4:33-36, July 1933.

grounds, Backing, Back lighting") is unreliable on account of the possibility of the user's missing what he is looking for. Lack of consistency in such comparatively minor matters as alphabetizing not only directly affects the reliability of a reference work from a practical point of view but is also a symptom of lack of editorial planning and supervision which may have caused more serious but less apparent flaws in the work, such as uneven developments of subjects and bibliographies.

A reference work may be impeccable and yet have no *raison d'être* because it provides little or no information not easily available elsewhere. Or it may be unduly expensive because around its specialty it has wrapped a padding of information gleaned from other well-known reference books which would naturally be consulted first by the intelligent reference librarian. In this case the book should be judged solely on the usefulness of the material peculiar to it in relation to its price. The unnecessary duplication of material is fairly easy to detect by comparison with other reference works. The evaluation of the distinctive material is more difficult, as it involves a consideration of the need for this peculiar information in the particular library and a testing of its authenticity, which, by reason of the very fact that it is unique, is hard to determine, unless the author has cited his sources. For example, much of the information in Douglas' *American Book of Days* is on festivals common to many lands and can be found also in general encyclopedias, handbooks and other books on holidays. The information on the origin of distinctly American holidays is, however, largely novel, interesting and of a kind likely to be in demand in many libraries, but owing to the fact that the compiler carefully refrained from including bibliographies it is almost impossible to verify it as authentic. The result is that it is practically futile to try to decide whether it is *really* worth its price as a reference work, except as a timesaver for the reference librarian too busy or too careless to make sure of the accuracy of information given out, or as material for an inquirer more desirous of curious or entertaining material than correct information.

On the other hand, even though a reference book may not provide any information not found in other reference works, it may yet be a useful addition to a reference collection because it presents its materials in an original way, affording a different approach from any other book. A new list of paintings may have been compiled which covers practically the same ground as an older compilation, but if the one already in the library is arranged by painter only, the reference librarian will welcome the new one because it is arranged by the titles of the paintings, even though the information it gives about them is not quite so detailed.

By the time the reference librarian has finished his examination of the book for reliability, and possibly earlier, he will have formed an opinion as to whether or not it is suitable for his clientele, whether its style and arrangement are simple enough for young or uneducated readers or whether it is scholarly enough for research workers and other highly educated persons. He will also have distinct impressions of the format, especially of the paper and typography. This may in-

fluence his decision to acquire some books. In the case of others it will make no difference because the content and arrangement are either so good that he can put up with thin paper and poor typography and can correct deficiencies of binding, or so poor that he would not consider purchasing them anyway. Naturally, in subjects and types of books requiring good illustrations these play a large part in the evaluation of the work, and in libraries for young people reference works should be as attractive as possible, although first emphasis must be placed on accuracy. The possibility that children may make more direct use of their reference works than adult readers, for whom the reference librarians are more likely to use reference works merely as "starters," make readability and simple arrangement a more important criterion for books chosen for reference work in school libraries and children's rooms.²

The question of the advisability of buying a new edition of a reference work of which an earlier edition is already in the library is largely a matter of comparison of the two editions, unless some other reference work in the same field has been published in the meantime and this needs also to be taken into consideration. Not only should the publisher's claims of new material be verified but other tests made to ascertain whether the revision has been thorough or is "spotty." For this, Heaps in his article on encyclopedia revision³ recommends "following through some single topic" and seeing whether allusions in articles on related subjects have been included or brought to date. In addition to ascertaining whether new material has been added one should look for deletions, especially if the purchase of the new edition would mean supplanting the old.

It may be noticed that one criterion usually mentioned for judging a reference book has not been discussed, namely bibliographies. This is because they are not needed in all types of reference books; for example, directories and most dictionaries and atlases do not require them. Their importance is always stressed in connection with encyclopedias, biographical dictionaries and histories.

Criteria for Judging Special Types of Reference Books

Application of the foregoing general recommendations for testing the reliability and comparative usefulness of reference books to the examination of a specific book involves the consideration of the standards for works of its particular type. A dictionary is not judged in exactly the same way as an encyclopedia because its purpose is different and therefore the criteria for judging it are different; for example, it is almost never possible to discover just who was responsible for its individual "articles" and, as it has just been noted, most dictionaries do not have bibliographies. A directory or an atlas or a bibliography or index does not generally have any articles. Some reference books require illustrations and some do not. Therefore, lists of "points" or criteria have been compiled by various people

²For advice on selecting reference books for children, see *Subscription Books Bulletin* for July 1941, and Beust, Norah E. "Selection of Reference Books," *School Life*, 25:165-66, March 1940.

³Heaps, Willard A. "Adequate Encyclopedia Revision," *Wilson Library Bulletin*, 14: 282, December 1939.

for several different types of reference works. Most of these have been prepared for the student of reference books with a view to teaching him not only how to evaluate them for purchase but how to systematize his knowledge of books so that he can decide which ones to consult for specific questions. These two aims are somewhat different. For the second there is no need to consider price, except perhaps for the safeguarding of very expensive works. Moreover, the student and reference assistant will be examining many books for their own information which have already been investigated and recommended and therefore, except for practice, they do not need to go deeply into the question of authority. For evaluation, on the other hand, some points of arrangement are not so important. For example, in evaluating an index it does not much matter whether the title and author entries are in two separate alphabetical lists, but for the most efficient use of the book it is important to note this.□

The preponderance of one aim over the other in the minds of compilers of criteria may account for some of the differences between their outlines, although for the most part they seem to have tried to make an outline which will do for both purposes. Mudge in her *Guide*⁴ introduces the outlines for indexes and encyclopedias as tests on the "cardinal points" which "determine the value of an index" and "decide the standing of an encyclopedia," but refers only to "studying" and "noting points" in the introductions to the outlines for dictionaries and atlases. Her outline for the study of reference books in general combines both the critical and the inquisitive or students' points of view as, in fact, do her special outlines in spite of the difference in their avowed purpose. Wyr⁵ provides "points on which to judge a dictionary" and "study points" for encyclopedias, maps and atlases, and bibliographies, all of which are evidently intended to serve both purposes. Shores⁶ includes a "working outline for the evaluation and use of reference books in general," refers to several scattered outlines for dictionaries before discussing the "criteria for evaluation and use" of dictionaries, compares critically the outlines for encyclopedias by Mudge, Wyr, Harris (unpublished) and Pratt,⁷ and proposes a scheme of his own. He also suggests outlines for evaluating atlases, indexes and bibliographies.

In general, outlines by various authorities differ more in order of arrangement and in explanatory material than in the items included. The first seems unimportant. Whether one examines format or authority first depends upon convenience or the chief interest of the particular examiner in the particular book. For children's reference books and books containing illustrative materials format is of first importance. For adult encyclopedias of some subjects authority far outweighs format. In general it would seem expedient to make a survey of the work as a whole before centering attention on details of small units, as in follow-

⁴Mudge, Isadore Gilbert. *Guide to Reference Books* (6th ed., Chicago, A.L.A., 1936), p. 5, 39, 51, 332.

⁵Wyr, James I. *Reference Work* (Chicago, A.L.A., 1930), p. 17, 20, 23, 27.

⁶Shores, Louis. *Basic Reference Books* (2d ed., Chicago, A.L.A., 1939).

⁷Pratt, Adeline J. *Encyclopedias: How to Use and Evaluate Them* (Chicago, Compton, c1933), p. 9-14.

ing Mudge's outline for atlases. It may be economical of time and effort to collect data which may be used for the evaluation of two or more points simultaneously, for example, to check articles for readability and accuracy, completeness and padding, all at the same time.

Before making a plan for the examination of a new reference book it should be helpful to look over as many as possible of the outlines for points to observe in its type because even though the points are practically the same in all outlines, the questions and explanations given by the different authorities supplement one another and suggest various methods of attack. It will generally be found, however, that each book has its own peculiarities of arrangement so that a new plan of investigation has to be prepared especially for it. Seldom can a ready-made outline for a type be followed exactly for the individual book. The preparation of a plan for investigation involves, first, the posing of a few general questions the answers to which would help one to decide whether to purchase the book for one's own library, second, compiling a list of the kinds of data whose interpretation would provide the answers, and third, a consideration of the most efficient way to secure the data and to divide up the work of collecting it if the evaluation of the work is to be a cooperative effort.

Aids to Selection of Reference Books

Fortunately, the need to make a thorough examination of an extensive reference work for the purposes of evaluation does not arise often in most libraries because it is usually possible to wait until such an investigation has been reported by some authority on reference works. For the most part, anyone who is forming or reforming a reference collection will be able to rely on aids to the selection of reference books for descriptions and evaluations.

Of these the internationally famous Mudge's *Guide to Reference Books*, with its supplements, is the solid base of a small pyramid of lists of reference books, diminishing in size and importance the further away they get from the base. A selective bibliography of the really good reference books in many fields, the *Guide* provides also advisory introductions to the reference materials on certain subjects and descriptive and often critical annotations which make it the reference librarian's mainstay for the selection of materials for purchase. In spite of its selectiveness, however, it lists a great many more books than most reference departments would be able to buy if they wanted them, and in spite of its comprehensiveness it does have some gaps for libraries of special interests, subjects, or clientele; it is not kept right up-to-date for new books, and it has some entries which lack annotations. So to meet one need or another, additional guides have been published. One of the first, in point of time, and the only other bibliography of reference books that could be rightly called "basic," is the "British Mudge," *Reference Books* by John Minto, librarian of the Signet Library of Edinburgh, published by the Library Association in 1929, with a supplement in 1931. This, of course, emphasizes British and European subjects, books, and points of view rather than American. One type of reference book excluded from

Mudge and included by Minto is the catalog of manuscripts. It also gives fuller information on the publications of the British Public Record Office and Historical Manuscripts Commission. It therefore will be of use, supplementary to Mudge, in the American library which is building up a reference collection to be used by historical research workers.

The desire of some people for a smaller selection of reference books is met by Mudge in her listing at the end of her work one hundred reference books suggested for first purchase by smaller or medium-sized public libraries. There is also a guide to reference books for the use of library school students compiled by Louis Shores, director of the Library School of the George Peabody College for Teachers, which contains a check list of a "core collection" of about five hundred titles,⁸ and there are a few lists of reference books for special types of libraries, such as college, school and branch libraries. In addition to the separate bibliographies and check lists of reference books are the shorter lists of general reference books found as sections of catalogs of books recommended for certain types of libraries, such as Shaw's *List of Books for College Libraries*. Some reference books are also scattered through lists of this kind under subject.

It was a very wise saying attributed to the San Diego Public Library Reference Department that "too much reliance on lists may tend to lull critical faculties that need to be kept alert."⁹ Certainly, if the reference librarian tries to meet the reference needs of his community and also takes into consideration the reference resources of other libraries in his region, he cannot adhere thoughtlessly to ready-made lists. They should be used only as reminders of books that might be overlooked. Every reference book purchased should be considered strictly in relation to the needs of that particular library. The way of the stereotyped list is broad and easy to follow but leads to a graveyard of idle books. The gate of individual judgment is straitened and hard to open but when it is opened the gatekeeper will admit a living reference collection.

The value of the list in selecting reference materials lies chiefly in its functions as a herald and reminder, a help to the assurance that one has not missed or forgotten a book that should be *considered* for purchase, not necessarily bought. The presence or absence of a book on any list is no proof that it should or should not be added to a given reference collection. It is not even a proof that it should be included or excluded in *any* reference collection. The reliability of a list depends in the first place upon the way in which it was compiled and in the second place upon the date of its compilation. Beware of lists based on holdings of libraries or on the pooled recommendations of librarians, for vicious circles may thereby be established, unless the librarians concerned are independent thinkers and investigators. One type of lists of reference books which is likely to be fairly reliable and useful as an aid in selection of technical books for the general library is that compiled for the general library by the special librarian who has had expe-

⁸Shores, *op. cit.*, p. 415-44.

⁹Baldwin, Emma V., and Marcus, William E. *Library Costs and Budgets* (N. Y., Bowker, 1941), p. 136.

rience in general reference work or by the collaboration of a subject specialist and a general reference librarian. The selection of technical, business, legal, art books, and the like staggers the general reference librarian. Better than any list is a conference with a special librarian, but if that is out of the question, those lists which appear from time to time in various library professional journals or in guides to the literature of a special subject are good substitutes, when their compilers have the qualifications mentioned above.

✓ Annotations add to the value of a list if they are based on a careful examination of the book and especially if they show how it differs from other books in the field. They are useless if they are simply digests of its preface and table of contents, or of the publishers' prospectus or blurb, with an added phrase that sounds like an evaluation but under the circumstances means absolutely nothing, like "A good reference book for school, college, public or home library." More specific facts are needed for a choice among many good reference books.

The use of the bibliographies and check lists so far discussed is in the formation and expansion of the main core of a reference collection for there is a need in every reference department for standard reference works, which very slowly become obsolete. But, as suggested in a previous chapter, a reference collection must not be allowed to stagnate. New material must be constantly added, not only the new editions and supplements of the books in the basic lists but new titles. Complete new editions of Mudge have been published at intervals of about six years, the last one published in 1936 covering works issued to the end of 1934 and some outstanding works published in the first half of 1935. Two supplements to the last edition, covering three years each, have been issued. These help to bridge the gap as historical records of reference books which libraries are still purchasing, but they can hardly be called current bibliography in the usual sense.

The need for current information on new reference books is partly met by the *Subscription Books Bulletin*, established by the American Library Association in January, 1930. This quarterly should be considered indispensable in practically every type and size of library. Originally confined to evaluation of subscription sets, it now includes reviews of reference books by standard publishers. One is tempted to say the smaller and more isolated the library the more it needs this bulletin. Its modest price may well be looked upon as an insurance premium against the wasting of large sums of money in the purchase of bloated reference works. Here are reported the results of just such investigations, by a committee of librarians representing various types of libraries over the country, as were described at the beginning of this chapter. It might be noted that some reference sets for children which are not included in Mudge are evaluated in this serial. Occasional numbers have been devoted to comparisons of books of a single type, such as dictionaries or atlases, which are of especial value to the librarian with a small budget for reference books because they include descriptions and evaluations of the smaller one-volume works, which are not dealt with in such detail elsewhere. Editorials also give general advice about the buying of

reference books and information on governmental trade regulations for subscription books.

The chief defect in the *Subscription Books Bulletin* is that there is necessarily a considerable lag between the assaults of the agents and the report of the committee's investigation of their wares. In January, 1938, therefore, a new department on current reference books was started by Louis Shores in the *Wilson Bulletin for Librarians* (now the *Wilson Library Bulletin*) "to review, note and list [current] reference books of interest to general libraries that are not sold thru subscription." As Mudge's *Guide* reflected the scholarly, critical point of view of the university reference library, so Shores' department reflected the more popular and less captious approach to reference materials of the school library.¹⁰ One of the particularly useful contributions of this department is the attention it calls to "borderline" books, that is, those that are not exclusively reference and would not be called "R" books and yet are exceedingly useful for that purpose and would in some libraries be duplicated in reference and circulation.

At the other extreme from both *Subscription Books Bulletin* and the *Wilson Library Bulletin* department, so far as selection of materials is concerned, are the quarterly annotated lists of foreign language reference books compiled by Louis Kaplan, reference librarian of the University of Wisconsin, which ran in the *Library Journal* from February 15, 1939, until November 15, 1940. Librarians who have a prejudice against foreign reference books should read some of his annotations to appreciate what information they may be missing by refusing even to consider a reference book in a foreign tongue. As a former reference librarian of a medium-sized public library has said, "The foreign language encyclopedias are not absolutely necessary in a medium-sized American library, but if a library owns one or two, it is an added advantage to the reference librarian in search for facts and data."¹¹ Even though one may not expect the inquirer to be able to read an article in a foreign language, the reference librarian's minimum foreign language equipment should enable him to pick out such items as dates, places and titles of books in an article about a person and to find pictures and maps.

Another short-lived, periodic, annotated list of reference books was the "Current Reference Aids" compiled by a committee of the Association of College and Reference Libraries and published in its journal, *College and Research Libraries*, June, 1940, to December, 1941. This list might be said to be the most comprehensive of all, as it netted British and foreign as well as American publications, popular as well as scholarly reference books, borderline and very specialized books, government publications and catalogs of manuscripts, and a few reference books for the children's room and school library. Here one can find in succession in the first list: Gardiner's *Happy Birthday to You! Complete Party Programs*, Gaul's bibliography on reclamation, the German White Book, Goode's

¹⁰In November, 1942, Frances Cheney, reference librarian of the Joint University Libraries, Nashville, Tenn., assumed the editorship during Dr. Shores' army service.

¹¹Baldwin and Marcus, *op. cit.*, p. 136.

Book of Ballets, Gore's *How to Get a Job*, Graumont's *Encyclopedia of Knots* and a British "command paper"! Succeeding lists were classified by the Decimal Classification but were just as catholic in content. Scarcely any evaluation was attempted, but from the third list to the last, references to reviews were included. A greater proportion of books on business, science and technology were listed than in Mudge or Minto or either of Shores' lists.

Some reference books are included with annotations in such general selective current lists as the *Booklist* and the "Readers' Choice of Best Books" in the *Wilson Library Bulletin*. These are generally the rather obvious ones which any librarian looking over the *Publishers' Weekly* or the advertisements in the library periodicals, with reference needs in mind, would pick out for himself as possibilities. More fruitful is a perusal of journals on special subjects which carry summaries and reviews of the current literature and bring to light reference books from unusual publishing sources, which are likely to be missed in either general book-reviewing journals or library periodicals. Ulrich's *Periodicals Directory* is a help in ascertaining those journals which contain book reviews.

After finding the title of a possibility for the reference collection in an unannotated or poorly annotated list, the librarian may search for reviews of it as for the reviews of any book, using the *Book Review Digest* for books of general interest, the *Technical Book Review Index* for technical books, and *Review Index* for others. Direct search may also be made in not only the journals and the bibliographies of the subject but also in library journals, since librarians have a particular interest in reference books and are as likely to publish reviews as subject specialists.

Cooperation in the Acquisition of Reference Materials

One problem which confronts librarians in connection with the acquisition of reference works is that of duplication of material. Can the library avoid allotting money and space to books which contain a great deal of identical information? The answer for some libraries is: No, in order to have at hand what is needed for many questions it is necessary to house also a great deal of duplicate material. Many yearbooks, for example, though presenting some new material in each issue, repeat a good deal from previous volumes. Is it necessary to buy one every year? That depends upon how much call there is for the new material. Here is an example of the opportunity for cooperation in the purchase of reference materials for libraries of the same system or region. If one library in a given region or community or institution can undertake to have a complete file of such a series as *Who's Who*, then the others may be able to agree on rotating the purchase of annual volumes. In this way none will be hopelessly out of date at any time for the general run of questions and may when necessary refer an inquirer to another library for a volume somewhat more up to date than the one in the local library, or may for the occasional question requiring the use of the latest or an early volume apply to the library with the complete file. For another yearbook the scheme of rotation would differ.

This simple cooperative plan can be applied also to the purchase of different complete sets like expensive encyclopedias of special subjects and to subscriptions for journals. In these cases, of course, there would not be rotation of years, but decisions made as to which library would purchase which title or specialize on which subjects. Such schemes are already in operation between college libraries and between public libraries of certain regions, and in large public and university library systems.

The plan can be put into operation in the branches of a public library or the departmental libraries of a university library "by authority." In the public and college libraries of a county or region or the special libraries in a city it must be a matter of agreement between libraries. It would seem to be a better scheme than the "hand-me-down" one, because it insures the appearance of some bright new reference books in every library, which keeps up the morale of those doing the reference work and wins the confidence of the readers. Of course, in the case of annuals like the *Rand McNally Commercial Atlas* in which a new issue supersedes older ones and there is no reason for a reference department to keep them all in the reference room, there could be no objection to distributing old issues in rotation to departmental and branch libraries. This could not so easily be carried out among libraries with separate administrations, but could be worked out on an exchange basis.

Negative Selection

"Negative selection," coined by Dr. Wyr (?) as a synonym for the more common term "weeding," is an important aspect of the selecting of reference materials. The selection of what is to remain in a reference collection or a library is a matter demanding as careful consideration as the selection of what is to be added. It is a pity that "weeding" was adopted by the library profession for this process rather than "pruning," for the latter word explicitly shows a greater concern with the shrub or tree that is being cultured than with the lopped-off branches and twigs. Old reference works are not weeds but dead or dying parts of the reference collection. A reference librarian should discard materials in the same way as he should choose them, that is, in relation to what is already in the collection and what is actually needed for the reference work of the library. Just because he sees the eleventh and fourteenth editions of the *Encyclopaedia Britannica* side by side on the shelves of the reference room of another library in which considerable historical reference work is done, he should not feel that he must necessarily keep the old eleventh edition on *his* reference shelves when he has at last secured the fourteenth, particularly if his questions are only for comparatively recent secondary or superficial information. On the other hand, he should not mechanically discard the tenth edition of Bartlett's *Familiar Quotations* when he buys the eleventh edition of it, for a reader might ask for one of the quotations included in the tenth and dropped from the eleventh edition.

Since reference rooms are limited in capacity, however, it is necessary for all libraries to retire some books from the reference room to make a place for new ones. Whether the old war horse will be sent out to pasture somewhere in

the library building, or be exchanged or given away to serve some new master who has some light work it can do, or sold for what its poor old carcass will bring, depends on several factors. Is it likely to be of occasional use to the library or will it be merely eating its head off in the stacks? Is there another one of its kind in a neighboring library? Cooperation in the matter of keeping old reference books is as much in order as in the purchase of new ones. Cooperating libraries may work out a scheme for insuring that one copy of an old reference work may be available for consultation in a region or system. If a central library keeps copies of all reference books that have been in the library, then the branches may safely discard those which they seldom use. Some period of probation might be given in which the reference department of a branch or other small library unit could keep a record of the use of old reference books, the length of the period of probation depending upon the rate at which the library is outgrowing its quarters.

It may be asked whether there is one form of reference book which should take precedence over another in the matter of preservation. This is a matter of opinion, as there is no study available on which to base conclusions. Frequent mention in articles on reference work of the use made of old directories of all kinds, biographical and genealogical works, gazetteers and maps, in tracing down obscure people of the past and changes in names of places, political boundaries and transportation systems would suggest that not only these particular forms of reference works but all types which contribute information on people and places, like encyclopedias,¹² yearbooks and atlases, are good reference books to keep if possible. And is there any form which might take precedence in the matter of discarding? Here, it would be safest not to name any specific form but to reply: Reference works which are absolutely superseded for all purposes, like the preliminary editions and issues of bibliographies and indexes whose content has been restated in final editions or cumulative issues, could without question be discarded except perhaps in the library of an institution in which reference books themselves might be objects of, and not merely aids to, research.

Before either destroying or disposing of an old reference book for its paper, if it is not physically worn-out beyond repair, the reference librarian should make as sure as he can that it would not be of use to some other library. There are, of course, some old reference books that are as common and unwelcome as many old Bibles and the Messages of the Presidents, and others that have become so scarce in comparison with the demand that they turn up periodically in the catalogs of secondhand bookdealers at advanced prices. Some, like Moulton's *Library of Literary Criticism* have been reprinted. The reference librarian who regularly scans trade lists and secondhand catalogs becomes aware of these. The librarian of the small library in which there may be no one carrying on this activity might well take the advice of the reference librarian in the library in his region which is known to do the most reference work. It is not likely that any great amount of

¹²It is misleading to say that "an encyclopedia which has gone out-of-date has no value as a reference work" because often an "out-of-date" encyclopedia includes a biography of someone whose name has been dropped from later works or information about a place no longer in existence.

money can be made through a sale, but it is possible that the library lacking and wanting the old reference work would offer in exchange some useful duplicates or materials that were better suited to the smaller library than to the larger one. But why demand an immediate *quid pro quo*? The good will of the larger library may well come in handy sometime when the smaller one needs an interlibrary loan or help in solving a reference question. When the exchange is in the other direction, i.e., when the larger library has duplicate copies of reference books to dispose of, it may find a place for them through the nearest county, regional or state library agency.

Out-of-print Reference Books

One of the problems which may confront the library needing to acquire or replace standard reference books that are out of print is the securing of copies at reasonable prices or at any price at all. In libraries with well-organized order departments that know their business and are conscientious the reference department can just turn in an order and wait confidently for results. In some libraries, however, the only demand for out-of-print books comes from the reference department, and the order department concerns itself entirely with current books. In these libraries, if the reference department is going to get what it wants it will have to do its own scouting. So the scanning of secondhand catalogs and the noting of sets offered for sale or "free for transportation" in the library periodicals becomes part of the reference department's routine work. Besides finding copies of books which the order department reports "o.p., unobtainable," the reference department may be able to save on its budget by discovering other standard reference books, which are *not* out of print, offered for sale at much less than the list or agent's price.

Circulation Books as Reference Materials

"R" Books Insufficient for Reference Service

The importance to reference work of books in the circulation collection is stressed by reference librarians of every type of library. Just why a school librarian or a branch librarian or a special librarian in speaking before other librarians or library school students should, as they often do, claim this as a peculiarity of the reference work in their particular type of library is a mystery. It is just as true of college and university libraries as of school libraries, and of central reference departments as of special libraries or departmental and branch libraries. The statement that the reference function of a library is satisfied by reference books¹ would not be endorsed by any reference librarian. Out of the twenty-odd questions which have been given as illustrations of methods of solving reference problems in previous chapters of this book, eleven were solved by means of circulation books alone, while only seven were answered by means of reference books alone. No matter how freely circulation books are transferred to or duplicated in a reference room, there is no room built that can begin to contain all the materials needed in answering satisfactorily all the reference questions asked in a library, public or college. (In the Oakland, California, Public Library all nonfiction except travel is administered by the reference department.²) The reference librarian, therefore, is vitally concerned both with what is added to the circulation collection and with what is withdrawn permanently from it.

"Borderline" Books

Some books are indeed bones of contention between the circulation and reference departments. These are usually the "borderline" books mentioned before. Their usefulness is recognized by the serious reader and therefore they are in demand in the circulation department as well as the reference. To be sure, this is true also of certain undeniably "R" books, such as the *World Almanac*, Keller's *Reader's Digest* and small bilingual dictionaries. In libraries in which there is a separate allocation in the budget for books for the reference room there should be no controversy. If the reference librarian thinks his department needs and can afford a copy of a book already in, or ordered for, the circulation collection, he will get an added copy. If he wants it, but not enough to spare money for it,

¹Randall, William M., and Goodrich, F. L. D. *Principles of College Library Administration* (2d ed., Chicago, A.L.A., 1941), p. 79.

²Blumann, Ethel. "Retooling for Defense," *Library Journal*, 66:435-39, May 15, 1941.

he surely cannot expect to transfer it in any highhanded manner. If he asks for the transfer to the reference department of a book which either circulates very rarely or is so much in demand that it quite clearly ought to be kept in the library (if additional copies cannot be secured), then his request is reasonable and it should not be turned down without due consideration. Both departments should consider the good of the public and not merely their own convenience. In a library in which the location of a book is not decided until it is acquired, arbitration between the demands of circulation and reference is necessary. The decision may have to depend upon the trial and error method—put it in circulation and see how often the reference department is thwarted by its absence from the shelves, or put it on open reference shelves and see how long it will stay there (a costly proceeding in some cases!) or on closed shelves and see how busy the reference department is kept explaining why it cannot circulate. A compromise may be made by restricting circulation to a brief period.

Reference Use of Infrequently Circulated Books

It is not just this type of book, however, which the reference librarian is thinking of when he says that he needs a good general collection of nonreference books in order to do his work. It is not even the informational book alone that he cares about. He wants the library to have also a good representative collection of belles-lettres, for he will need that for tracing quotations, poems, literary criticisms, etc., and for providing portraits and other illustrations, to say nothing of various clues leading to other sources, all of which can be found in books written with no intention of disseminating knowledge.⁸

The reference department, therefore, deserves a voice in the selection of circulation books of all kinds and also in their disposal. If a reference librarian has a question which he believes could be answered by means of a circulation book that he has used for similar questions in the past, he is infuriated to find that that book has been discarded because, forsooth, it had not circulated for five years. If it did not circulate frequently, so much the better—it could be counted on to be in its place when it was wanted! He may resolve then and there that he and all his staff will carry with them self-inking dating stamps prefixed with R and thus record on dating slips their use of books outside their special domain, for a book is not put into circulation every time it is used for reference. The information obtained from it may be relayed to the inquirer over the telephone or it may be used as a steppingstone to the location of information in another book. Certainly, if a library has a reference librarian or anyone on its staff who is doing reference work, no "last copy" of a book should be discarded from the library without his being given the opportunity at least to evaluate it from his point of view. And no reference librarian should give his approval to the destruction of material not immediately useful if it may be wanted in some other library or if there is the slightest probability of later development of a research clientele for

⁸For the use of fiction in supplying information, see Picken, Mary Brooks. "Fashion's Story," *Wilson Library Bulletin*, 16:810-13, June 1942.

his library. Because the persons at the Bodleian who sold a First Folio of Shakespeare with a lot of duplicates, thinking it had been superseded by the Third Folio, have been dead for more than two centuries, there is no impropriety in calling attention to that transaction as an example of poor judgment.⁴ The American public library, however, that destroyed periodicals of reference value because they were no longer in demand at the circulation desk and the American college library that burnt up old textbooks with fine disregard of the later generations of research workers in education shall be nameless. (May their names not be "Legion!")

However, "not all old books are valuable and the question of which to preserve . . . may be answered only after considering the conditions in the individual library."⁵ If the reference librarian is given the chance to evaluate materials which the circulation department thinks should be discarded, he should exercise just as careful judgment as in selecting for acquisition, for it costs money to *keep* books. He should also be prepared to give an intelligent opinion as to what should be done with those which he agrees no longer deserve a place on the shelves of his library. In addition to the prevention of unwise discards by the staff the reference librarian can take a part in the protection of valuable materials from loss or destruction, whether intentional or through legitimate but unnecessary usage by readers. Certainly a library should be able to look to its reference department as well as to its cataloging department for bibliographical expertness. The reference department, which is constantly delving into all parts of the library, is in a position to detect rarities which may have passed unnoticed through the cataloging department or have become rare since they were cataloged, and then to make recommendations for their preservation or proper disposal. No library is too small to contain a rare book or two if it is either an old library or has been the recipient of gifts from old private libraries. A very small public library in the South found a first edition of *Uncle Remus* among its gifts which it was able to exchange for a whole box of new books (undoubtedly a wise decision for it, but a larger library might have hesitated). And no library is so modern or special that it may not contain a pamphlet which, due to a small edition or destruction or suppression of most of the edition, has become a rarity.

In addition to evaluating old books for the library itself, most reference departments are called upon sometimes to help their readers to decide what to do with their own books. A librarian should be wary of giving his own opinion as to the value of a book belonging to another person unless he is really a specialist in rare books, but he should be able to find information about the rare book trade and collections in general and usually about the book in question, which can be laid before the inquirer.

The first question the reference librarian asks himself about a book which is

⁴For accounts of its discovery in private ownership and its restoration to its original owner at a cost of £3000, see *The Original Bodleian Copy of the First Folio of Shakspear* (Oxford, Clarendon Pr., 1905) and Smith, Robert M. "Why a First Folio of Shakspear Remained in England," *Review of English Studies*, 15:257-64, July 1939.

⁵Huntington, Lucile. "Rare Book Collections in College and University Libraries," M.A. thesis (Urbana, Ill., Univ. of Illinois, 1938, MS).

under consideration for discarding is naturally the same he would ask in considering a new book for acquisition: Of what *use* is this book likely to be in *this* library? Perhaps it is completely out of date and misleading in the information it gives. Yes, but what about the person who wants to find out what people knew and thought about the subject at the time this was written? Do we often get questions of that kind? If so, is there any other book in the library which will give a clearer and more complete exposition of past views or is this the only one of its kind and date? That old book of essays by a forgotten author is never read nowadays. Surely it will never be used in a state library. Yes, but it has many references to a city in the state and contains pictures which are just what the illustrator of a story laid in that city in the early 1800's needed to show him what kind of a cap to put on a boy's head.⁶ Whether the library ever or often receives questions of this kind the reference department knows and should be able to produce corroborating evidence from recorded questions.

Protection and Disposal of Rare Books

The second question is: What is the value of the book aside from its potential use in reference work? If it is to be kept should it be guarded against theft and abuse? Should the library's possession of it be made known to the world of scholars? If it is to be discarded what disposal should be made of it?

As a preparation for answering these questions the reference librarian is fortunate if he has had the benefit both of instruction from a specialist in rare books and of experience in a library which owns many rare books and has a staff that knows how to take care of them. The necessary background cannot be filled in by a few minutes of reading, but the minimum of information which every reference librarian should have is simply and interestingly presented by Eunice Wead of the University of Michigan Department of Library Science in her article, "Rare Books and the Public Library."⁷ In it will also be found references to articles and books which will lead to more detailed information on specific topics. Regular perusal of the departments on rare books in *Publishers' Weekly* and the weekly review journals will also help to give one an appreciation of the value of old books as a class. The kinds of rare materials likely to be overlooked in libraries are described by Wead and also in the manual for state and local directors of the Victory Book Campaign, which adds a list of authors who are collected for certain titles in first editions.⁸ Wead notes the special sources of information on the prices of rare books which are most likely to be in a library (book auction records,⁹ etc.) and gives advice on the disposal and care of rare books. If the library

⁶MacDonald, James. "The Illustrator as Detective," *Publishers' Weekly*, 133:128-31, Jan. 8, 1938.

⁷Wead, Eunice. "Rare Books and the Public Library," *Wilson Library Bulletin*, 14: 625-30, May 1940.

⁸"... Manual for State and Local Directors, Victory Book Campaign," *A.L.A. Bulletin*, 36:160-61, February 1942, part 2.

⁹Definitions of terms and explanation of the descriptions found in such records and in secondhand dealers' catalogs are given in West, Herbert Faulkner. *Modern Book Collecting for the Imppecunious Amateur* (Boston, Little, 1936).

does not have even the bibliographical equipment described by Wead, it should adopt the following precept: "Do not destroy any adult nonfiction until lists of them, or the books themselves, have been checked by someone competent to judge their present usefulness in some other library or their value to the library as rare books."¹⁰

If it seems desirable to keep a rare book in a library which does not have a rare book collection, the responsibility for its preservation is quite likely to come on the reference department. If the library collection is generally on open shelves, rare books should be set apart on closed shelves. If the main collection is already on closed shelves, it may be sufficient to mark the books with some symbol to indicate that they are not to be taken from the building and perhaps are not to be used without the approval of the reference department, since readers are quite likely unwittingly to ask for an old edition when a newer one would serve their purposes just as well if not better. Part of the care of such books involves the question of rebinding. Since the value of old books is apt to be diminished by unintelligent rebinding, whoever is responsible for binding should be informed of proper methods. Reading the chapter on rebinding in Vincent Starrett's *Penny Wise and Book Foolish*¹¹ is a pleasant way of finding out how to avoid ruining an old book. One caution the reference librarian might add, which applies also to books that are in no sense rarities, is not to let the binder discard the advertising pages, which, as shown in a preceding chapter, are sometimes useful for the bibliographical purposes of finding out about other books by the same author or publisher and of tracing book reviews.

In trying to ascertain the value of an old book, the seeker may be disappointed that no record is found of its sale in the auction records. This is not necessarily a sign that the book has no value. There may simply never have been a copy brought to market and so no one can estimate its probable monetary value. It may not be a "collector's item" and so have a comparatively small sales value and yet have a high research value in certain libraries. If it appears to belong to one of the categories of rare books described by Wead but is not listed in the bibliographies and library catalogs which "ought" to contain it, or if only one or two copies are located, then the library has the responsibility either of recording its ownership in the Union Catalog of the Library of Congress or of offering it to some appropriate research library, one which has a special collection on the author or subject or form or period of the book. This is one of the ways in which the smaller libraries may not only repay their debts to the larger ones but may participate in aiding research whose fruits may later benefit reference work in all libraries. The sort of books, both rare and "disreputable," which are wanted in research libraries have been described by the head of the order department of the University of Minnesota Library. His article may serve both as an indication of the kinds of books a public library may discard and offer to a research library,

¹⁰New York (State). Division of Adult Education and Library Extension. *Weeding the Library* (Albany, N. Y., 1940), p. 9.

¹¹Starrett, Vincent. *Penny Wise and Book Foolish* (N. Y., Covici, Friede, 1929), p. 119-35.

and as a warning to college libraries which have any likelihood of becoming university libraries of what they had better keep for future needs. At the end is a list of dealers to whom a library may be able to sell certain kinds of unwanted materials.¹²

Some national exchange systems for the placement of discarded materials in libraries where they will be useful have been set up for special groups of libraries or types of material. They are sponsored by the following organizations: Special Libraries Association, Medical Library Association, American Association of Law Libraries, and the Periodical Exchange Union of the Association of College and Reference Libraries.¹³

¹²Shove, Raymond H. "The Disposal of Unneeded Books in a Public Library," *Minnesota Libraries*, 13:208-11, September 1941.

¹³This list was taken from Philadelphia Bibliographical Center and Union Library Catalogue. *News Letter*, Sept. 12, 1941.

Periodicals and Newspapers

Importance of Serials in Reference Service

It is no longer necessary to argue for the importance of periodicals and newspapers in reference work. From childhood up the present generation has read them and used them for information more than books. In view of the innumerable enthusiastic testimonials of reference librarians as to the supremacy of periodicals as reference materials it may become necessary to write an apologetic for books, lest the periodicals elbow them entirely out of libraries, and serials departments monopolize reference work. Just because almost every question *can* be answered by means of a periodical, if one searches long enough, it does not follow that it can *best* be answered that way. Some of the questions which serials departments triumphantly cite as examples of the variety of information to be found in periodicals could be answered just as well, and probably more quickly, by means of a reference book or a pamphlet. There is the story of a long search, carried on in a great reference library to find the freezing point of mercury, which ended with a trade journal several years old, although the same information could have been found in a trice in an ordinary dictionary if anyone had thought to look there.

It is true, however, that a very large proportion of the reference work in practically all types and sizes of libraries is accomplished by means of periodicals and newspapers. They supply the most up-to-date information on all subjects, minute data and articles on small parts of subjects which never appear in books, original reports of research, reviews of books, obituaries and other personal sketches, evidence on "firsts," contemporary accounts of past events, maps and pictures of places, pictures of objects either very recently made or discovered, or no longer in existence, and so on. They are indispensable—there is no doubt of that—in spite of all their unruliness. For periodicals are one of the hard forms of printed materials to comprehend and manipulate physically and mentally. It is on account of this that in some large libraries there is a separate periodicals or serials department which handles all the reference work connected with periodicals as well as their acquisition and care. In most libraries, however, even when there is a separate periodical reading room, no distinction is made between periodicals and books so far as reference work is concerned, hence the reference department's vital interest in the selection of periodicals.

The general principles of book selection apply also to periodicals, that is, suitability to the needs of the library, inclusion of various types, and avoidance

of unnecessary duplication. There is, however, a demand from librarians for selected lists of periodicals just as for lists of reference books, and there is just as much danger in too great a reliance on them. Periodicals stop publication or change their names and characters so suddenly that almost any list is sure to become out of date in respect to some titles while it is in the process of publication. Nevertheless, people go courageously on compiling lists of periodicals recommended for this type of library or that, and it has to be admitted that it would be very hard to start selecting periodicals for any library without benefit of any selective lists. No list should be followed slavishly, however. It would be foolish, for example, for a librarian in a small rural community in the Southwest to postpone subscribing for *Mexican Life* until after subscribing for *Annals of the American Academy* and the *Teachers College Record* because the first is not listed and the other two are not only listed but starred in Walter's *Periodicals for Small and Medium-sized Libraries*.¹

Selective Lists of Periodicals ✓

Since there are already several selective lists of periodicals and probably more to come, some criteria are needed to aid in the selection of one or more to use. (1) The list which is to be used as the main guide should be compiled for the appropriate type and size of library. There are lists for large libraries of all kinds, for small and medium-sized libraries, for college libraries, for school libraries, and on special subjects. It is advisable, nevertheless, when convenient, to supplement the list chosen as the main guide by lists for other types of libraries, since periodicals also suitable for public libraries may get included first in lists for school or college libraries and vice versa. (2) The latest revised edition of the list should be used. (3) It should give prices and publishers' addresses and provide good descriptive annotations based on recent examination of the periodicals. A new edition of a list which shows changes in titles but no changes in the notes on titles carried over from previous editions should be distrusted. (4) It should either be a classified list with title index or an alphabetical title list with a classified index. The classification may be by subject or by type of periodical or preferably both. (5) Last, but not least, it should have a sound basis and method of selection. In general, it may be said that lists which are based merely on the holdings of libraries are not necessarily more reliable than those based on one person's opinions. In fact, a list selected and annotated by a specialist on periodicals is more reliable than one which simply records, by means of library holdings, the choices of many librarians, who have been too busy with all kinds of duties to make independent intelligent evaluations of periodicals and who have followed either ready-made lists or one another. The same defect may be found in lists made up of pooled opinions or ratings by many people. It is possible for a majority to rate a periodical higher than it deserves because of failure to check up on its present character. On the other hand, a minority may vote for the newer

¹Walter, Frank K. *Periodicals for Small and Medium-sized Libraries* (7th ed., Chicago, A.L.A., 1939).

title that actually deserves the higher rating because only the few have yet seen it or used it enough to appreciate its value. Although the compiler of the list may try to make allowance for this by instructions not to rate periodicals unknown to the rater and by computing final ratings on percentage basis of those rating each title, there is a tendency on the part of most people to give some kind of rating based on very superficial knowledge rather than to admit ignorance. Lists compiled by this method are reliable only if the raters have been carefully selected for their special knowledge, good judgment and unassailable honesty.

For the selection of periodicals for current subscription the most dependable advice comes from someone who has both an extensive and an intensive knowledge of periodicals, either a member of a general serials department or of a specialized subject department or library, or someone who has made a special study of periodicals. Ulrich's *Periodicals Directory*,² and the shorter lists, Walter's *Periodicals for Small and Medium-sized Libraries*,³ Martin's *Magazines for High Schools*,⁴ and Lyle's *Classified List of Periodicals for the College Library*,⁵ all meet the requirements of good general selective lists of current periodicals. A bibliography of lists and aids to the selection of periodicals of special subjects can be found in Gable's *Manual of Serials Work*,⁶ but this needs to be brought up to date by means of subject bibliographies and indexes to periodicals, for lists of periodicals limited to one subject are usually not separates but published in some subject journal or guide to the literature of the subject. One list specialized not in subject but in source is the Special Libraries Association's *United States Government Periodic Publications*.⁷

There is need for current supplements to these annotated lists. The department of "Births and Deaths" in the *Bulletin of Bibliography*, which also records "marriages" of periodicals has long been a standby for information on the occurrence of new titles, mergers, and cessations, but it does not include descriptions or evaluations to help in selection. The Periodicals Committee of the School Libraries Section, Division of Libraries for Children and Young People, of the American Library Association made a report on new periodicals in April, 1941, in the *Wilson Library Bulletin*, and Ulrich and Wright contributed notes on new periodicals to *College and Research Libraries* in September of the same year. If this report and these notes could be continued and published quarterly, if not more frequently, they would be as welcome to librarians for help in selecting new periodicals as *Subscription Books Bulletin* is for reference books. To be sure, it is easier to obtain a sample copy of a periodical than to have a reference book sent

²The latest edition of *Periodicals Directory*, ed. by Carolyn F. Ulrich, is the Inter-American edition (N. Y., Bowker, 1943). It does not supersede the previous edition for non-American titles.

³Walter, *op cit*.

⁴Martin, Laura Katherine. *Magazines for High Schools* (N. Y., Wilson, 1941).

⁵Lyle, Guy R. *Classified List of Periodicals for the College Library* (2d ed., rev. and enl., Boston, Faxon, 1938).

⁶Gable, J. H. *Manual of Serials Work* (Chicago, A.L.A., 1937).

⁷Special Libraries Association. Washington, D. C., Chapter. *United States Government Periodic Publications* (N. Y., The Association, 1942).

on approval, but, on the other hand, it is not safe to judge a periodical from a single issue, particularly the first issue.

Evaluation of Periodicals for Reference Use

Both for the estimation of periodicals not already subscribed for and not on recommended lists and for reappraisal of periodicals before renewing subscriptions the reference librarian should be able to evaluate a periodical from personal examination and investigation. In Gable's *Manual of Serials Work*⁸ there is a sample of a periodical appraisal card to summarize information about a periodical, and in Martin's *Magazines for High Schools*⁹ there is an outline of criteria for evaluating magazines, based in part on an article by Dorothy K. Cleaveland on judging magazine articles.¹⁰ It must be remembered that all aids to the selection of periodicals consider the reading interest as well as the reference value point of view. If the reference librarian wishes to judge a periodical just from the latter point of view he will have to select from annotations in bibliographies and from criteria in outlines those points which especially affect reference use. To the criteria in Martin the reference librarian would add the points of indexing, both by general indexing services and by the periodical itself, and of special departments and reference features.

It is a fallacy, however, to think that periodicals have no reference value unless they are indexed in *Readers' Guide* and other indexing services. The reference librarian who knows periodicals as well as he knows his reference books will often go directly to the file of one which he thinks is likely to have the information he has been asked to find. Practically no periodical which contains anything besides contributed articles is completely indexed in any indexing or abstracting service. Short editorials, obituaries, news notes, directorics, brief book notices are only a few of the most common items which are not included in general indexes, and yet, brought out in the periodical's own index, they are often the only source of information on some point.¹¹

Not all periodicals have to be subscribed for at a price, since most organizations which wish to spread information for one purpose or another issue periodicals, many of them free. This raises the question of propaganda in the library, although, as Ditzion has pointed out, the ordinary magazine issued for the purpose of making money is by no means free from this "taint" either.¹² It must be noted that not all propaganda is evil either in intent or in content so that there is no reason why a library should not gladly accept a place on the mailing list of many an honest publisher of a free periodical if it contains material which is

⁸Gable, *op. cit.*, p. 54.

⁹Martin, *op. cit.*, p. 137-39.

¹⁰Cleaveland, Dorothy K. "Judging Magazine Articles," *Educational Administration and Supervision*, 25:146-48, February 1939.

¹¹A list of about 25,000 cumulative indexes to four or five thousand individual periodicals is the check list of those in the New York Public Library, compiled by Daniel C. Haskell and published by the library in 1942.

¹²Ditzion, Sidney. "The Problem of Propaganda Magazines," *Wilson Bulletin for Librarians*, 11:21-24, September 1936.

useful to the library. For example, house organs, especially those that are issued to the general public, though their aim may be to promote the interest of their firms, contain a great deal of useful material that often cannot be found elsewhere. All house organs are such an invaluable record of business interests in their own localities that they are carefully collected and preserved in local collections.

Back Files of Periodicals

Making out a subscription list and keeping it revised are not the only phases of selection of periodicals for reference use. There are also the problems of back files: which ones to keep, how long to keep them, how to preserve them, what sets to try to acquire or complete. Again, these are questions which must be decided in relation to the circumstances of each library: the space available and the reference demands. A rule to dispose of all periodicals after they are two years or three years or five years old is too arbitrary for all but libraries with the most restricted accommodations. Some periodicals remain useful for reference longer than others. Too much dependence should not be placed on the possibility of borrowing old periodicals from other libraries, since many libraries are reluctant to let this kind of material leave their buildings; but photostats of magazine articles can almost always be secured, if the reader is willing to wait and he or his library is willing to pay for them. If there is space for storage, periodicals may be kept without binding, though it requires more time and effort on the part of the staff to keep unbound numbers in order than bound volumes. Keeping back files in this way for a few years and recording their use will help in the decision either to bind for permanency or to discard as not worth the space and trouble to care for them.

In the larger libraries where a good deal of reference work is done, many periodicals will be bound, some may be kept in unbound form until their value or lack of value is established, and some ephemeral ones may be discarded because they have been replaced by more permanent materials. In the largest reference libraries practically all will be preserved in some form, though possibly some will be stored separately from the main collection of the library, and some may be reproduced on microfilm so that they may be stored more economically.

It is in the selection of periodicals for permanent scholarly reference use that the lists of periodicals which are compiled by the method of "counting references" are of special value. These lists, of which several have been made by subject specialists and by graduate library school students, are on special subjects and consist of a rating of periodicals according to the number of references made to them in certain "key journals" or annual reviews during a given period of years.¹⁸ To consider these lists as infallible indications of the "best" periodicals on a subject involves the assumption that the writers of the articles in the "key journals" actually chose the best materials and were not influenced by what was

¹⁸A critical and statistical comparison of this method and the pooled-opinion method was made by Estelle Brodman in her Master's essay, "Methods of Choosing Physiological Journals" (N. Y., Columbia Univ., 1943, MS).

easily available to them. There seems to be the possibility of a vicious circle in this method as in any method involving the contingency of a limited choice. To be sure, the journals most often referred to by writers will be the ones most in demand by the readers of their articles and for that reason might well be stocked by libraries.

Cooperative Buying and Microfilms

This standardization, as it were, of the scholarly journals needed in libraries catering to research workers raises the problem of collecting complete files of back numbers for which the library may not have subscribed in the first place, or which may have been lost. The fact that the demand is greater than the supply has raised prices so that libraries have found it burdensome, if not impossible, to purchase all that they would like. The problem may be met in two ways: by cooperation among libraries in a given region and by microphotographic reproduction of sets not protected by copyright.¹⁴ By the former method duplication of sets in the region is avoided. Agreements are made to ensure the use of one set to all the cooperating libraries, either by a system of interlibrary loans or by the maintenance of a central library or storehouse. Microfilms are less expensive than periodicals in their original form. They also help to solve the problems of storage and of transportation for interlibrary loans. Cooperation, of course, may be applied to the acquisition of reproductions as well as of originals.

Newspapers have been reproduced by microphotography more than other kinds of serials, thousands of them having been photographed on microfilm in the last few years in this country, including both old and rare files and current numbers. The University Microfilms of Ann Arbor is reproducing all extant American periodicals between 1741 and 1799. The Union Catalog of the Library of Congress maintains a separate union catalog of newspaper microfilms and in June, 1941, a preliminary check list compiled from it was published in the *Journal of Documentary Reproduction*. (By the way, this is an example of the kind of article which a reference department would note in an index of reference features in periodicals.) The place where the film may be obtained is given in this check list, and the price, whenever possible.¹⁵ Newspapers are a kind of serial which calls for a country-wide scheme of cooperation like that adopted in Virginia by which all Virginia papers are preserved by a division of responsibilities among the libraries of the state.

¹⁴Fussler, Herman H. "Photographic Reproduction and National Resources for Research." In his *Photographic Reproduction for Libraries* (Chicago, Univ. of Chicago Pr., 1942), p. 29-47.

¹⁵Schwegmann, George A. "Preliminary Checklist of Newspapers on Microfilm," *Journal of Documentary Reproduction*, 4:122-34, June 1941.

Pamphlets and Information Files

The Vertical File

Many years ago a university reference librarian went to see the new library building of a university in a neighboring state, arriving early in the day, before the reference staff had gone on duty. Spying a magnificent vertical file across the room, she hastened to it, eager to pick up some suggestions for her pet file at the library back home, and was surprised to find the drawers empty. When the head of the reference department appeared, and credentials had been presented, the visitor remarked that they must be looking forward to getting their pamphlets transferred into the splendid new files and was astonished at the reply. There were no pamphlets for the file and so far as the present incumbent was concerned there never would be any—it was a perfectly useless and rather unwelcome piece of furniture, for pamphlets were not fit for reference work, except possibly those that came from the government. These were later displayed to the visitor in neat rows of pamphlet boxes in the stacks.

There are still reference rooms without vertical files or any other provision for "ephemeral" materials. Presumably these are in libraries where all the reference questions deal with the past. In most libraries of every type, however, reference librarians look upon their files of pamphlets and miscellaneous materials as just as essential to their work as the *Readers' Guide* and the *World Almanac*. Into the file or its equivalent go the publishers' short biographies of their newest authors, the Public Affairs pamphlet on the pro's and con's of chain stores, the clipping of the President's last message to Congress, the leaflet on enriched bread from the American Institute of Baking, the free advertising folder of the watch manufacturer which describes the mechanism of a watch, the study outline on conservation of natural resources from the state department of conservation, the reprint on marine animals from *Nature Magazine*, the speech of the Librarian of Congress on propaganda from the University of Chicago Round Table; and out they come again to answer the questions of the housewife, the student, the business man, the school teacher, the commercial artist, the city fathers. Wherever people come to the library for information on the things and events and ideas of the present day a ready-reference file of pamphlets must be provided. It may be deduced from the examples given above that the word "pamphlet" is used here to cover practically every kind of publication that may be put in a filing case except books, periodicals, maps and pictures. Justification for this arbitrary definition may be found in the first paragraph of Lester Condit's *Pam-*

phlet about Pamphlets,¹ in which he introduces his summary of attempts to answer the question "What is a pamphlet?" by the story of the advertising executive who, in the manner of Humpty Dumpty, appropriated the right to say whether a small publication was a book or a pamphlet.

It is not merely the instinct for bargains that fills the vertical files of libraries, even though most of these materials are free or inexpensive, but the fact that much of the information contained in them is simply not available yet in books and is too scattered in periodicals to be gathered together quickly. The bargain seeker's instincts, in fact, must be suppressed if the library is not to be flooded with more materials than it needs and can care for. The late Margaret Smith, in one of the best of the many articles on pamphlet collections, gave the following caution:

The mere addition of material to the collection, without a thoughtful consideration of standards and aims, will result in a cluttered file of unnecessary bulk and the establishment of the idea that the pamphlet file is of little or no value. . . . The main purpose . . . in most libraries is to supplement deficiencies in the book collection. Some libraries, particularly business or advertising types, collect data and statistics for temporary use, until digested or more recent figures are available. Other libraries, particularly technical ones, collect pamphlets for permanent use, often finding that the only source of certain facts or data is available in one particular pamphlet.²

The content of the pamphlet file of the general reference department of a public, school or college library is naturally more miscellaneous than that of a special library or department, and its curator needs to take especial pains not to let it fill up with outdated or unneeded materials. As for all reference materials, selection should rest upon a study of questions asked and of the interests of the community. In the interest of business reference service by the public library in a small center, Cavanaugh has effectively described how to find out about the principal industries of a community, how to determine trade papers which should be subscribed to, read, and clipped, and how to locate the government agencies which can supply original source materials of importance to various businesses or industries.³

Propaganda

It has been claimed, not without reason, that the average library file of pamphlets is full of propaganda and that in spite of good intentions to represent both sides a folder of material on a controversial subject is likely to be overbalanced on one side. This is the inevitable result of accumulating what comes most easily and cheaply and not taking the time to discriminate or to make the effort to solicit materials from both sides. A great majority of pamphlets are issued with the purpose of influencing their readers to do something—to take certain political

¹Gondit, Lester. *Pamphlet about Pamphlets* (Chicago, Univ. of Chicago Pr., 1939).

²Smith, Margaret G. "Solving the Problems of a Pamphlet Collection," *Special Libraries*, 28:75-80, 110-15, March-April, 1937.

³Cavanaugh, Eleanor S. "A Vertical File for Business Information," *Wilson Bulletin for Librarians*, 10:320-22, January 1936.

action, to travel in a certain state, to buy a certain author's books or a certain firm's products, to give to some cause, to improve health, to conserve wild flowers. Most pamphlets that are issued without price are not published for nothing! Those that are published altruistically, purely for the public welfare, generally have a small price attached to cover costs, but this cannot be taken as the distinguishing mark between propaganda and nonpropaganda or between propaganda for a "good" cause and for an "evil" purpose. Even school children are able to pick out the objective facts they want about the history and production of a food with which the manufacturing firm entices them to read a pamphlet that includes advertisements of its particular brand; and it would be a very inexperienced traveler indeed who could not make allowances for the enthusiasm of a state tourist bureau or a chamber of commerce. For the subtler propaganda on social, economic and political controversial questions, as Ralph T. Esterquest has suggested, a warning along the lines of the following may be placed in the folders containing such materials.

PLEASE NOTE

The contents of this folder consist largely of unsolicited literature sent to the library free of charge. For this reason it is likely that a large proportion of the pamphlets are written and distributed by organizations having a more than ordinary interest in the subject, one way or the other. The user of this folder is reminded, therefore, to be on the alert for partisan, biased, and misleading information.—THE LIBRARY.⁴

Current Selective Lists of Pamphlets

It is not in the plan of this book, however, to discuss the organization of reference materials until the discussion of principles and problems of selection is finished. To return, therefore, to the subject of acquisition of materials for reference purposes, not only the selection but the ordering or solicitation of pamphlets is in some libraries one of the functions of the reference department rather than of the order department because this kind of material, being of little profit to a middleman to handle, cannot generally be obtained through the regular book trade. In any case, the discovery of the source of a pamphlet generally occurs simultaneously with that of the pamphlet itself, if it does not precede. Often the actual title of the pamphlet is found only from its source.

Naturally, since this material is chiefly valued for its up-to-dateness, "standard lists" are soon out-dated and currently published lists are a necessity. Selective lists of free and inexpensive materials printed in the *Booklist*, *Library Journal*, and *Publishers' Weekly* may be the only current aids the busy "librarian-of-all-work" in the smaller library has time to check, but the separate lists to which some libraries subscribe, the *Vertical File Service Catalog*, the *Pamphleteer Monthly*, and the *Adult Study Guide* of New York University, are the main sources of information for the medium-sized and larger libraries. These

⁴Esterquest, Ralph T. "Pressure Groups in Your Pamphlet File," *Library Journal*, 64:226-27, March 15, 1939.

more general lists must be supplemented for extensive or specialized files by *Public Affairs Information Service Bulletin*, publishers' lists and various subject bibliographies and periodicals that list or note such materials. Subscriptions to pamphlet series and the placing of one's name on the mailing-lists of agencies chosen with regard to the special needs of the library will also yield useful publications.

Governments are among the most important publishers whose lists should be checked, but the appraisal of them is deferred to the end of this section. Most of the other agencies which issue lists are the publishers of series of pamphlets on public affairs. The United States Office of Education published a list of these under the title of *Public Affairs Pamphlets* in 1937, with a supplement in 1938. A selective list of such publishers is included in Norma Olin Ireland's article on "Pamphlet Sources for the School Librarian" in the *Wilson Library Bulletin*, December, 1940, and a supplementary list by her was published in the following number of the *Bulletin*. Addresses of associations, foundations, commercial firms, transportation lines and tourist bureaus are given in Elizabeth Findly's *Free and Inexpensive Materials*, published in 1939 as a bulletin of the Curriculum Laboratory of the University of Oregon. Subject bibliographies of pamphlet materials, and periodicals which include lists of pamphlets as a regular feature, are listed by both Findly and Ireland. These references should prove as useful to public and college libraries as to school libraries. The Roman Catholic point of view is represented in *The Index to American Catholic Pamphlets*, by E. P. Willging.⁵ An example of a list of periodicals of more specialized interest is Appendix III of Manley's *Business and the Public Library*.⁶ The variety of agencies which may be addressed directly for information about their publications is indicated in the first chapter of Ireland's *The Pamphlet File*.⁷ They include political parties, religious denominations, banks, foundations, societies. Caroline C. Curtis, assistant secretary of the Public Affairs Committee, classifies organizations into four types: "membership" organizations that issue pamphlets written by their headquarters staffs for the information of their members, such as the National League of Women Voters; "action" organizations which promote a specific program by education for action, i.e., propaganda, for example, the National Association of Manufacturers and the League for Industrial Democracy; "research and educational" organizations that issue unbiased facts about controversial questions, for example, the Foreign Policy Association and the Public Affairs Committee; and "workers'" organizations that publish pamphlets for workers' educational groups, for example, Affiliated Schools for Workers.⁸

One list that is likely to be overlooked is the section of the *United States*

⁵Willging, E. P. *The Index to American Catholic Pamphlets* (Catholic Library Service, 382 Robert St., St. Paul, Minn., 1937). Supplements 1938 and 1939.

⁶Manley, Marian C. *Business and the Public Library* (N. Y., Special Libraries Association, 1940).

⁷Ireland, Norma Olin. *The Pamphlet File in School, College, and Public Libraries* (Boston, Faxon, 1937).

⁸"University Library Extension Service Round Table." In *Proceedings of the Sixtieth Annual Conference* [A.L.A.], *A.L.A. Bulletin*, 32:975-78, Oct. 15, 1938.

Catalog of Copyright Entries which includes pamphlets, leaflets, addresses for oral delivery, lectures and sermons.⁹

Central Distributing Agencies

As a result of the widespread variety of sources of pamphlets—much greater than that of books—special centralized distributing agencies which act as clearinghouses for the orders of libraries have been established. The best known of these are connected with the commercial services of information on pamphlets: the Vertical File Service of the H. W. Wilson Company and the *Pamphleteer Monthly*. A subcommittee of the Subscription Books Committee of the American Library Association was appointed to investigate commercial services for these kinds of materials and made its first report in the fall of 1942.¹⁰

It is a question that has not been settled, except perhaps by an individual library for itself, whether it is more economical and satisfactory to employ a commercial service or to send directly to the sources. It would depend upon the amount of this kind of material acquired by the library and upon the staff available to handle the business. Within a library system its own centralization of the acquisition of pamphlets for all departments and branches, the same as of books, would certainly be more economical of staff hours and postage than allowing each department or branch to write for pamphlets to their sources, though it entails a good organization of distribution in order to prevent delays and dissatisfaction at the points of contact with the readers.

Local Materials

One kind of source which is not covered by the commercial distributing agencies is that of the community to which the library belongs. To secure the many leaflets, programs, announcements, instructions, and so forth, issued by all kinds of local institutions for the information of their members and of the community at large, the whole library staff may be called on to aid in collection. If their various contacts are not wide enough to embrace all organizations, then the services of interested readers or "friends of the library" may also be enlisted. This applies not only to public libraries but to all types of libraries, the only difference being in the interpretation of "community." In a college town, it would be a natural division of labor for the college library to collect all the "gown" materials and the public library, all the "town" materials, each library selecting for duplication whatever was found to be urgently needed from the other's province.

Preservation of Pamphlets

The shift from the idea of selection to that of collection suggests that the reference department should have an interest in the preservation of pamphlets. The fact that in many libraries the home of the pamphlet is the information file,

⁹Booton, Mabel, and Sanderson, Lucia H. "The Needs of Today," *Library Journal*, 60:694, September 1935.

¹⁰Dixon, D. Genevieve. "Free and Inexpensive Materials," *Subscription Books Bulletin*, 13:41-42.

which is in the nature of a supplement to the book collections and which to be efficient must be kept cleared of superseded materials, is likely to obscure the fact that pamphlets may have a permanent value. Even if a pamphlet no longer has any value, Mrs. Smith warned that it might be desirable to keep it to prove that very point, because someone finding a reference to it in a bibliography might demand to see it.¹¹ If this is likely to be the case the pamphlet should be cataloged so that it may be easily found. Otherwise old pamphlets may be kept in boxes classified by subject, but not cataloged as individual items.

Some libraries maintain a pamphlet collection in addition to the information file. This may be a part of the circulating collection, but the reference department will use it as it does books that circulate. This aspect of pamphlet collecting is discussed in Lester Condit's *Pamphlet about Pamphlets*,¹² in which will be found also selective bibliographies of different topics on the subject of pamphlets.

¹¹Smith, *op. cit.*

¹²Condit, *op. cit.*

Audio-visual Materials

Indispensability for Some Reference Questions

Because a map gives the only clear demonstration of the comparative sizes and shapes of two countries, a portrait of a person conveys a better idea of his features than a description, a diagram shows at a glance the relations between the parts of a machine, and a good colored plate shows the colors of a flower, reference librarians have always made use of illustrations of various kinds, wherever they could be found, whether in books, periodicals, pamphlets or in separate form. Therefore, information files either include folders containing separate maps, portraits and pictures, or are supplemented by separate files of these types of materials, which in some libraries are either separate departments or are attached to a subject department. In addition to these forms of flat illustration, which do not always give an accurate representation, globes and stereographs have been included in the reference equipment of libraries for many years. It is only limitations of space and considerations of administration that should prevent the addition of objects and models to a reference collection. That reference department is indeed fortunate that is located in a library having as close connections with a museum as the Newark Free Public Library. In lieu of the objects themselves, the reference department needs to include in its equipment aids to their location in museums.

Lantern slides and film strips, although usually associated with art and education departments of libraries, are by no means foreign to the work of other subject departments or of a general reference department.¹ Nor are motion pictures and phonograph records. By what other means could one answer so effectively such questions as: What gestures did a certain famous man usually make when he was addressing an audience and how did a certain poet read his poems? Although the last-named of these so-called "audio-visual aids" have so far been used chiefly with groups for educational purposes, their great possibilities for use with individuals for reference purposes may bring them into the reference collections of the near future. What reference librarian's imagination would not be stirred by the possibilities of an extensive record collection?²

In preparation for this possible development, as well as for present reference aid to teachers in locating and selecting these materials, reference librarians

¹Brown, Florence Maple. "The Use of Slidefilms in Libraries," *Special Libraries*, 33: 363-64, December 1942.

²"A Library for Listeners," *Books at Brown*, 5: 1-3, March 1943.

should familiarize themselves with their use and the principal catalogs and directories of their publishers and manufacturers. Most books and articles on the subject in general, being addressed to teachers and school librarians, stress them as educational rather than reference aids. Marion W. Craig, however, in an article entitled "Let's Look and Listen" includes a selective reading list for librarians on audio-visual aids and the library³ and Mary E. Townes has pointed out to librarians the importance of collecting motion pictures and phonograph records as source material for historians of the future.⁴ The increasing use made in universities of phonograph records, pictures, motion pictures, and sound films for both instruction and research is bound to be reflected in university and other research libraries as well as in the libraries of elementary and secondary schools.⁵

General Aids to Selection

The numerous aids to the location and selection of these materials include both catalogs and indexes of all kinds of illustrative materials and those of special groups such as motion pictures or phonograph records. The first catalog for the use of librarians in particular was compiled by the Publicity Committee of the American Library Association with a view to suggesting sources of materials for display.⁶ However, it may just as well be used as an aid to securing materials for reference use, as it includes charts, maps, films, slides and pictures, with specific information on the materials to be secured from each source. A more extensive directory of sources, which, however, gives less information on materials, is *Sources of Visual Aids for Instructional Use in Schools*, published by the United States Office of Education.⁷ This is a directory of federal and state government departments and agencies, colleges and universities, libraries, museums, associations and commercial dealers, from which charts and graphs, exhibits, film strips, slide films, still films, lantern slides, maps and globes, motion pictures, objects, specimens and models, pictures and photographs, posters and cartoons, cameras, materials and equipment for making lantern slides and film strips, and projectors of various kinds may be obtained, whether free, for sale or rent. More extensive still, and also much more expensive, is *A Survey of Sources of Free and Inexpensive Educational Materials* published by the Quarrie Corporation,⁸ which is a

³Craig, Marion W. "Let's Look and Listen," *School Library Association of California Bulletin*, 13:14-17, January 1942.

⁴Townes, Mary E. "New Aids for Familiar Purposes," *A.L.A. Bulletin*, 34:691-94, December 1940.

⁵American Library Association. *College and University Library Service . . . Papers Presented at the 1937 Midwinter Meeting of the American Library Association* (Chicago, The Association, 1938), p. 35-36.

⁶American Library Association. Publicity Committee. *Leads No. 7* (rev. ed., Chicago, The Association, 1939, mimeo.).

⁷U. S. Office of Education. *Sources of Visual Aids for Instructional Use in Schools* (Pamphlet no. 80, rev. 1941).

⁸*A Survey of Sources of Free and Inexpensive Educational Materials, Special Report No. 17* (Chicago, Quarrie Reference Library, c1941).

The price of this was reduced from \$5 to \$1 (according to *Subscription Books Bulletin*, 14:9, January 1943), but it remains more expensive than the government publication.

classified subject list not only of sources but of the actual illustrated pamphlets, pictures, maps and motion pictures issued by them. Similar, but usually shorter, directories are to be found in the handbooks on audio-visual aids prepared for teachers. Moreover, for special subjects, series of lists for various studies in the school curricula have been published by some of the teachers' colleges.

Some of the audio-visual materials, for example, slides, motion pictures and phonograph records, require additional equipment and special rooms for their use. This is the main reason why in most library buildings of the present they are not practicable for use in answering the reference questions of individual readers. However, if a library building is being planned to accommodate them, an estimate of the expense may be made by means of the tables of apparatus with approximate costs in M. L. Shane's article, "The Audio-Visual Library: an Acquisition Plan."⁹

Maps

Before starting to select and collect maps on any extensive scale the reference librarian who has not much knowledge of them would do well to read the articles by the chief of the map division of the New York Public Library in the *Library Journal*.¹⁰ The papers by Strong and Bay in *Public Documents*, 1936¹¹ outline the history of map making in this country and explain some of the uses made of various types of maps. "Building a Collection of Maps," by Espenshade in the *A.L.A. Bulletin* of the same year¹² lays down principles for forming a well-balanced map collection with examples of the proper map coverage for a foreign continent and a foreign country, followed by a "minimum list of recent maps" of the United States. Points for judging maps are given in Wyer's *Reference Work*¹³ and Mudge's *Guide to Reference Books*.¹⁴

Since, according to Espenshade, governments produce nearly 90 per cent of the maps published today, their lists are of first importance. There are two general lists of maps issued by the United States government. *Price List 53* of the Superintendent of Documents, since it is arranged alphabetically by subject, is the more convenient one to use when one wants to find out if the government has issued a map of a given state or region or of a special kind, such as aeronautical or highway. A bibliography compiled for the Business Information Service

⁹Shane, M. L. "The Audio-Visual Library: an Acquisition Plan," *Peabody Journal of Education*, 18:420-30, July 1940.

¹⁰Ristow, W. W. "The Library Map Collection," *Library Journal*, 67:552-55, June 15, 1942.

Ristow, W. W. "Maps for Global War," *Library Journal*, 68:324-25, April 15, 1943.

¹¹Strong, Helen M. "Maps in the Service of the Government." In American Library Association, *Public Documents*, 1936 (Chicago, The Association, 1936), p. 59-90.

Bay, Helmuth. "Maps in the Service of Business." In *Public Documents*, 1936, p. 91-99.

¹²Espenshade, Edward B. "Building a Collection of Maps," *A.L.A. Bulletin*, 30: 206-15, April 1936.

¹³Wyer, James I. *Reference Work* (Chicago, A.L.A., 1930), p. 4.

¹⁴Mudge, Isadore Gilbert. *Guide to Reference Books* (6th ed., Chicago, A.L.A., 1936), p. 333.

of the Bureau of Foreign and Domestic Commerce¹⁵ shows the kinds of maps produced by the various government agencies. Claussen and Friis, *Descriptive Catalog of Maps Published by Congress*¹⁶ is an index to maps in the serial set and would not be useful for selection purposes. Other catalogs of maps are published by departments or bureaus, for example, the Hydrographic Office. The chapter on maps in Schmeckebeier's *Government Publications and Their Use* is an excellent discussion and bibliography. A more extensive guide to maps published by other governments as well as by the United States government is Thiele's *Official Map Publications*.

The other two primary sources for maps, according to Espenshade, are scientific societies and institutes and the commercial publishing houses. A selected list of about a dozen of these is appended to the U. S. Business Information Service list referred to above. These do not, however, include the commercial publishers of free maps. Probably more than one modest map collection has started from a set of gasoline company road maps. Harriet M. Skogh suggests some other sources for free and inexpensive maps in her article in *Illinois Libraries*.¹⁷ For information about new maps *Current Geographical Publications* of the American Geographical Society of New York may be checked. This bibliography also lists photographs and films on geographical subjects.

Although for information on places and transportation lines as they are today it is necessary to keep a map collection up to date, the use of maps for historical purposes should not be forgotten. Old maps show boundaries, names, routes, sites and even geographical features that have disappeared from view and memory. As cities grow, ponds, swamps and watercourses are filled in and forgotten, sometimes to become nuisances later on unless their hidden presence can be ascertained. Old maps settle historical problems: if old Rogers' maps of the British colonies in America had been published or their originals preserved, they would doubtless establish the location of the fort whose site furnished one of the questions discussed previously in this book. So maps should be discarded with as great discretion as books, periodicals and pamphlets.

Pictures, Charts, Graphs

Throughout the libraries of this country picture files are undoubtedly more common than map collections. Some large public libraries have more than one, as there are difficulties in the way of organizing one picture file to fit the needs of several groups of people: children, school teachers, students of art, journalists, designers, manufacturers, play and pageant producers, advertising artists, and so on. In school and college libraries and the school departments of public libraries pictures are generally chosen and arranged to suit curricular needs: home economics, art, literature, nature study or the various branches of science,

¹⁵West, Gladys, comp. *Some References to Map Producers and Sellers* (Bureau of Foreign and Domestic Commerce, 1940).

¹⁶Claussen, Martin Paul, and Friis, Herman R. *Descriptive Catalog of Maps Published by Congress, 1817-1843* (Washington, D. C., privately published, 1940).

¹⁷Skogh, Harriet M. "Maps: Inexpensive and Free," *Illinois Libraries*, 23:6-10, December 1941.

geography, history and the social studies. In special libraries and departments picture collections, of course, conform to the specialty.

Even the poorest library can have a picture collection of sorts, as illustrations may be cut from worn-out books and discarded magazines and from Sunday newspapers and advertising materials contributed by members of the staff and friends of the library. A label from a tin can was once used by a hard pressed librarian to furnish a colored picture of a lobster. There is indeed such an abundance of material that there is danger of a collection becoming unwieldy unless each picture is scrutinized carefully and its worth to the library estimated with judgment. To be really an asset to the reference department the collection of pictures must be more than haphazard, and when it comes to filling in gaps it will be found necessary to spend some money on postage and purchases.¹⁸

The main sources of separately published pictures are museums and commercial firms, whose prices range from less than a cent apiece to one hundred dollars or more. A list of thirty commercial firms, nine museums and societies and four encyclopedia publishers of pictures is in Ireland's "Picture File Pointers."¹⁹ The list compiled by Marcelle Frebault²⁰ is almost twice as long and includes a few British museums. Only eight firms and three museums and societies appear on both lists. Two directories of publishers and dealers of just one kind of picture, reproductions of works of art, are *Photographs of American Architecture, Painting, Sculpture and Decorative Arts*, 1937, published by the Metropolitan Museum of Art in New York, and "Sources for Reproductions of Works of Art," which was compiled through the cooperation of art museums and libraries.²¹ The Metropolitan Museum list is more than twice as long, but the other list of over fifty gives more information about the types, sizes and costs of the photographs, slides and prints. For lists of sources of pictures for other special subjects one may use the "Index to Sources of Pictures" in Frebault²² and may turn to the general lists of audio-visual aids, all of which include pictures.

Slides and Films

Reference departments, especially in ~~research~~ libraries, have for some time been using films of articles and books, but these are merely a special kind of reproduction of the printed or written word and, except for the photofilms of illustrations from books and periodicals, they are not a part of the illustrative materials under consideration here. Libraries are not yet generally prepared to run through a motion picture in order to answer some individual's reference question, but theoretically at least there seems to be no reason why they should not in the future render this service as well as contribute to education by this means. A British

¹⁸Giganti, Carl J. "Pictures in a Small Library," *Wilson Library Bulletin*, 15:225-29, November 1940.

¹⁹Ireland, Norma Olin. "Picture File Pointers," *Wilson Library Bulletin*, 16:259-60, November 1941.

²⁰Frebault, Marcelle. *The Picture Collection* (5th ed., N. Y., Wilson, 1943), p. 13-16.

²¹"Sources for Reproductions of Works of Art," *A.L.A. Bulletin*, 30:287-99, April 1936, part 2.

²²Frebault, *op. cit.*, p. 87.

librarian even forecasts the use of television screens for reference work in libraries.²³ In the meantime the reference department should be prepared to furnish information about films and slides, to compile or help compile a list of films or slides for a class or study group, and, if the library does not include such materials in its interlibrary loan service, at least to put the inquirer in touch with the proper agencies. A basic list of reference materials needed for these purposes forms Appendix F of McDonald's *Educational Motion Pictures and Libraries*.²⁴ If these do not suffice, information may be obtained from the Recording Division of the New York University Film Library and the American Council on Education.²⁵ The experiences and practices of three libraries which give film service are described in Appendix C of McDonald.

Directories and catalogs are essential as there are more than five hundred distributing agencies in the United States, including not only the regular commercial distributors in the motion-picture industry and the commercial producers of educational films but also United States government bureaus, state government departments, university extension divisions, industrial, business and professional associations and industrial concerns.

The need for the preservation of motion pictures as historical records is fully recognized and they now are included in archival collections. McDonald cautions, however, that old films must be examined as critically as books and manuscripts for accuracy. Everyone is, or should be, aware of the fact that "documentary films," like "faked" photographs, when propagandist in nature, may present falsehoods.

Phonograph Records

At just about the time that public libraries began putting motion-picture projectors into their auditoriums they began to add records to their collections of musical scores and also to use them in story hours for children. This seems to have been between 1910 and 1914.²⁶

Record collections have been largely associated with music departments of libraries, but they are also used in connection with language and literature. (The "talking books" for the blind may be said to correspond to the microfilms of books, as their purpose is to present the words of a book and not to illustrate a manner of rendition. This would not necessarily preclude their use for reference but simply puts them into the general category of books for a certain group of people.) It is perfectly practicable to use a record in answering an individual's

²³W., D. Y. "A Vision of a Small-Town Library," *The Librarian*, 32:112-13, April 1943.

²⁴McDonald, Gerald Doan. *Educational Motion Pictures and Libraries* (Chicago, A.L.A. 1942).

²⁵Address: 1511 Newsweek Building, 152 West 42d St., New York City.

²⁶Hurlbert, Dorothy. "Moving Pictures," Minnesota Public Library Commission, *Library Notes and News*, 4:132-39, December 1914.

Newhard, Mabel. "The Use of the Victrola in the Virginia (Minn.) Public Library," *Wisconsin Library Bulletin*, 10:76-77, April 1914.

Wright, Ethel C. "The Use of the Victrola in the Story Hour," Minnesota Public Library Commission, *Library Notes and News*, 4:126-27, December 1914.

reference question. The imaginative reference librarian has only to read H. G. Hauck's article on "The Use of Phonograph Records in the Junior College"²⁷ to think of ways in which records might be used in general reference work.

For the purpose of selecting musical records, Kolodin's *Guide to Recorded Music*²⁸ is especially good, although not so comprehensive as *The Record Book* and its supplements by David Hall.²⁹ For records other than musical it is at present necessary to use the lists of audio-visual aids and whatever subject bibliographies include records.

²⁷Hauck, H. G. "The Use of Phonograph Records in the Junior College," *College and Research Libraries*, 2:327-31, September 1941.

²⁸Kolodin, Irving. *Guide to Recorded Music* (N. Y., Doubleday, 1941).

²⁹Hall, David. *The Record Book* (N. Y., Smith & Durrell, 1940). Supplements 1941, 1943.

Publications of Governments and Other Institutions

Principles of Selection

The groups of reference materials whose selection has been discussed so far owe their separate consideration to differences in their forms. The final group is singled out for special discussion on account of its source of supply, for the materials in it are some of them reference books, some of them periodicals, some of them pamphlets, some of them audio-visual materials—and some of them just books! The reason for this separate discussion of them is that since they are not ordinarily handled by the book and magazine trade they are not advertised nor fully listed in trade bibliographies and are therefore more likely to be overlooked by the person selecting reference materials than books in the trade. Total warfare, however, made publications of governments, which constitute by far the largest part of nontrade publications, of vital concern to every citizen, and librarians who may have shunned “public documents” in the past were forced to recognize their great reference value.

From the point of view of selection government publications are of two kinds. The first group includes those which report and regulate the business of the government itself, the accounts of legislative proceedings, the compilations of laws and regulations, reports of their interpretation, and all the manuals, directories and registers that give information about government bodies, their personnel and their methods of procedure. The second group comprises those which report on the research carried on by government agencies and popularize the results for the edification and practical welfare of the people. In times of war and periods of forced budgetary economies it is the second group whose publication is curtailed. From the first group come the source materials for the student of political science and history; from the second come the reports of research in which scientists and economists are interested, as well as nontechnical treatments of scientific and technical subjects. In the first group, therefore, a general library selects publications of the governments under which it exists. The reference librarian in the United States will choose those that come from Washington, his own state capitol and city hall and will seldom make the effort to secure this kind of material from foreign governments or from other states and cities, unless he has among his clientele people who have a special interest in political science. Most school, public, and special libraries, therefore, do not collect the debates of foreign parliaments or sets of foreign laws. A college or university library, however, is more likely to have a need for them on account of courses and research work

in political science and history. A state library will collect the publications dealing with the governments of other states and with the local governments in its own state, and a municipal reference library will collect publications of cities of comparable size, because they serve the personnel of a government which is presumably interested in knowing how other similar governments have solved problems.

When it comes to publications of the second type, however, political boundaries are of no significance, and a reference librarian should select according to the subject needs of his clientele the publications from any government just as he does from any firm in the publishing trade. Therefore, no reference librarian should ignore the check lists and selection aids of governments other than the ones under which he lives, for if he does he is likely to miss some valuable contribution to a subject needed in his library. American libraries were forced in the winter of 1941-42 to turn to British government publications for information on war and defense problems because their own government had not yet had to deal at first hand with them and could not get out information fast enough.

Aids to Selection

The aids to discovering and selecting government publications are official and nonofficial. Governments vary in the adequacy of their check lists, price lists and catalogs. The national governments of the United States and Great Britain issue current lists of their publications, both general and special. The library which needs materials on all subjects may use the former long comprehensive lists, and the special librarian may confine his attention in some cases to the shorter lists of single departments or bureaus. The current general lists of the United States government are the *United States Government Publications Monthly Catalog*, which is comprehensive, and the *List of Selected United States Government Publications*, formerly weekly, but bimonthly since November, 1942. Both are issued by the Superintendent of Documents, who also publishes at irregular intervals *Price Lists* on various subjects. Corresponding in all but one respect to both the *Monthly Catalog* and the *List* is the British Stationery Office monthly *Government Publications*, which prefaces a comprehensive list by an annotated selective list. This British catalog, however, is not so comprehensive as the American ones because it includes only the documents for sale by the Stationery Office. Besides these, both governments issue lists of the publications of single departments or bureaus, and the British government issues a separate, cumulative list of *Statutory Rules and Orders*. Various dominions, colonies and so forth of the British Commonwealth of Nations also issue check lists, some monthly, some annually and others irregularly. Reference departments of the larger libraries, especially of those interested in both kinds of government publications, need to check all the comprehensive official lists of most of the English-speaking nations and in addition those of the South American and major European governments. Special libraries may be satisfied with checking the appropriate department or subject lists of the United States and

Great Britain and other nations specializing in the subject. The smaller libraries may find the selective lists, which are usually free, sufficient for their needs.

Nonofficial, general current lists, which are selective, include those of the United States government publications in the *Booklist*, of the British government in *Library Association Record*, of Canada, including Dominion and provincial, in the *Ontario Library Review*, and of other countries in the periodical, *Foreign Affairs*. An annual selective list of U. S. government publications has been printed in the June number of the *Wilson Library Bulletin*, beginning in 1939.

For state publications the reference department will, of course, check the lists of its own state, if any are published, and the Library of Congress' *Monthly Checklist of State Publications* for whatever additional states and special departments issue materials of interest in that library; for example, a library in Illinois might check the publications of Indiana and Iowa; the education department of any library might check the publications of every state education department. For municipal publications there is no check list like the *Monthly Checklist of State Publications*, but the "P.A.I.S." *Bulletin (Public Affairs Information Service Bulletin)* is generally checked for the publications of the larger cities.

Dependence upon lists, however, will not keep a reference collection up to date on government publications. It is necessary to be alert and make notes of publications whenever mention is made of them in magazines¹ and newspapers and over the radio. It is even necessary to anticipate publications of new government agencies or of old ones to which new functions have been given because by the time they are published and listed or noted the edition is likely to be exhausted. Often the librarian will be disappointed because, after all, many government publications are issued not for the benefit of the public at large but of government officials or a special group of business organizations with which the government is dealing, and editions are planned only to meet these needs. It is one of the anomalies of government publishing that the size of editions is fixed by laws and appropriations which do not take into account the probable demands of the public. For the most up-to-date information on the publications of the various governments of the British Commonwealth one can apply to the British Library of Information, 30 Rockefeller Plaza, New York City, and for publications of other governments of the United Nations to the United Nations Information Board, 610 Fifth Avenue, New York City.

So far, the selection of government publications has been considered from the point of view of new titles or the individual document just published, but libraries which make extensive use of them for reference get them in series, either through subscription or by securing a place on a mailing-list. Depository libraries, which are entitled to have certain publications of the United States government sent to them as soon as published, may indicate their choices on check lists supplied by the Superintendent of Documents. In addition to Boyd,² several

¹For a list of government periodicals to check see Boyd, Anne Morris. *United States Government Publications* (2d ed., N. Y., Wilson, 1941), p. 501-02.

²Boyd, *op. cit.*

nonofficial guides are available to libraries which wish to select state as well as federal publications of the United States and also the publications of neighboring nations.³

In using these aids it must be remembered that government organization and publishing policies are in constant state of change, and for current continuations every government author and every series listed must be checked in official sources such as the *Monthly Catalog*, *United States Government Manual* and the *Canada Yearbook*. The semiofficial *Book of the States* published by the Council of State Governments is a convenient biennial compendium of information on state governments, and, with the *Monthly Checklist of State Publications*, may be used to keep information on state government authors up to date.

Since 1938 a useful series of lists of guides and bibliographies of publications of federal, state and foreign governments has been published in *Special Libraries*.⁴ In June 1942 papers on the war publications of the United Nations were presented before the Committee on Public Documents of the American Library Association.⁵ For further information on foreign government publications reference may be made to papers and bibliographies by James B. Childs, some of which have been published in the *Public Documents* series of the American Library Association and others as publications of the Documents Division of the Library of Congress; to the *List of the Serial Publications of Foreign Governments, 1815-1931*; to *The Economic Literature of Latin America*, published by the Bureau for Economic Research in America at Harvard University; and to José Meyer's papers on French government publications.⁶

³Higgins, Marion Villiers. *Canadian Government Publications* (Chicago, A.L.A., 1935).

Ker, Annita Melville. *Mexican Government Publications* (Wash., Govt. Print. Off., 1940).

Miller, Kathryn Naomi. *The Selection of United States Serial Documents for Liberal Arts Colleges* (N. Y., Wilson, 1937).

Schmeckebier, Laurence F. *Government Publications and Their Use* (2d ed. rev., Washington, Brookings Institution, 1939).

Wilcox, Jerome Kear. *Guide to the Official Publications of the New Deal Administrations* (Chicago, A.L.A., 1934). *Supplements*, 1936, 1937.

Wilcox, Jerome Kear. *Manual on the Use of State Publications* (Chicago, A.L.A., 1940).

Wilcox, Jerome Kear. *Official Defense Publications* (Berkeley, University of California, 1941). *Supplement*, 1942.

Wilcox, Jerome Kear. *United States Reference Books* (Boston, Faxon, 1931). *Supplement*, 1932.

⁴Wilcox, Jerome Kear. "Recent Aids to Public Documents Use," *Special Libraries*, 29:176-80, 224-28, July-August, September 1933; "Aids to Public Document Use Since 1937," *Special Libraries*, 31:389-95, November 1940; "Aids to Foreign Public Document Use Since 1937," *Special Libraries*, 31:432-35, December 1940; "Guides and Aids to Public Documents, 1941," *Special Libraries*, 33:79-84, 124-26, March, April 1942.

⁵Wilcox, Jerome Kear, ed. *Public Documents and World War II* (Chicago, A.L.A., 1942).

⁶Meyer, José. "Public Documents of the French Colonies." In American Library Association, *Public Documents*, 1938 (Chicago, The Association, 1938) p. 97-126.

Meyer, José. "French Official Publications in the Second World War," *College and Research Libraries*, 3:82-88, December 1941.

Government Publications as Historical Source Materials

To many librarians reference work with government publications means only the use of the most recent materials, but government publications are also essential source materials in history. The struggle to secure these precious series is perhaps even more strenuous than that for early files of periodicals. The lack of enough copies to go around among the libraries wanting them suggests the same expedients as those for meeting the periodical file problem, namely, cooperation between libraries of a region and photographic reproduction. Although cooperative schemes have been discussed for some years, no report of the actual operation of such a plan especially for government publications has yet been published. The agreement of two southern universities on the cooperative acquisition of state government publications was outlined in *College and Research Libraries*.⁷

The outstanding examples of photographic reproduction of government publications are the filming of the N.R.A. and A.A.A. hearings⁸ and the micro-print edition of the *Sessional Papers* of the British House of Commons⁹ under way at the present time. A less ambitious undertaking was the filming of the *Journal Officiel* of the Vichy government, June 1, 1940—August 12, 1941, by the Library of Congress.¹⁰

The discarding of government publications should be done with great care, as they are valuable source materials. Librarians who do not wish to keep them should not destroy them without advice from someone who knows their value. Some cities and regions have clearinghouses for the exchange of such materials. It is hoped that the system of depository libraries may be reformed so that every region may have a complete set of U. S. government publications. The State Document Center Plan was devised for the preservation of state and local government publications as well as other source materials pertaining to each state.¹¹

Private Institutions and Organizations

Still more elusive than government publications are the publications of private institutions and organizations: learned societies, professional and trade associations, laboratories, museums, universities and foundations. Since the Bowker list of 1899 no general catalog of national and state society publications has been published, and it is necessary to track them down through subject bibliographies

⁷Pratt, E. Carl. "Library Cooperation at Duke and North Carolina Universities," *College and Research Libraries*, 2:143, March 1941.

⁸American Library Association. *Public Documents*, 1935 (Chicago, The Association, 1936), p. 202-06.

⁹"The British House of Commons Sessional Papers Project," *College and Research Libraries*, 2:332, September 1941.

Erickson, Edgar L. "The Sessional Papers Project," *Journal of Documentary Reproduction*, 4:83-93, June 1941.

¹⁰"News and Technical Notes," *Journal of Documentary Reproduction*, 4:192, September 1941.

¹¹Kuhlman, A. F. "Preserving Social Science Source Materials," *A.L.A. Bulletin*, 27:128-32, March 1933.

and notes in periodicals. Various directories of learned societies indicate those which publish and which are likely to list their own publications in their annual reports or their news bulletins. Three important federations of learned societies, covering science and technology, the humanities, and the social sciences respectively, have published handbooks which furnish directory and some bibliographical information for their constituents.¹² A directory of *Trade and Professional Associations of the United States* was published by the United States Bureau of Foreign and Domestic Commerce in 1942. A *Handbook of International Organizations* was published by the League of Nations in 1938, and a union list of the publications of international congresses was compiled and published under the auspices of the Bibliographical Society of America.

If a university has a press of its own a list of its publications will probably be found in the *Publishers' Trade List Annual*. Otherwise it is necessary at present for a library to compile as best it may its own list of colleges and universities to which to apply for information. Lane's doctor's dissertation on university presses may be helpful in this connection.¹³ A study of monograph series published by American universities is being carried on by Katherine A. Higbee, reference librarian at the University of Rochester, at the present time. This, when finished, should prove an additional aid to the selection of university publications of reference value.

¹²National Research Council. *Handbook of Scientific and Technical Societies and Institutions of the United States and Canada* (2d ed., Washington, The Council, 1930).

Joint Committee on Materials for Research of the American Council of Learned Societies and the Social Science Research Council. *Survey of Activities of American Agencies in Relation to Materials for Research in the Social Sciences and the Humanities* (Washington, Cooperating Councils, 1932).

American Council of Learned Societies. *Research in the Humanistic and Social Sciences* (N. Y., Century, 1928).

¹³Lane, Robert F. *The Place of American University Presses in Publishing* (Chicago, Univ. of Chicago Pr., 1942).

IV

ORGANIZATION OF REFERENCE MATERIALS



Reference Room and Reference Books

Purpose of a Reference Collection

Opinions as to the proper kinds of books to segregate from the whole library collection for a reference collection or room have varied at different times, in different places and in different types of libraries. At one time the prevailing purpose of shelving books in the reference room seems to have been that of preservation. Books that were very expensive or hard to replace or in great demand were put in the reference department's custody for safekeeping. So, in the reference rooms of a few old public libraries that have continued to creak along in the ruts they made in the good old Victorian period will still be found large, heavy, handsomely bound, lavishly illustrated tomes that no one ever opens, and in the reference rooms of some college libraries will still be found many copies of books reserved for classes. The latter are not quite so much out of place as the former because a good many books of the kind that are put on reserve are also useful for reference; still a reference department will usually heave a sigh of relief when a new building, or an addition to or rearrangement of an old building, makes possible the removal of reserve books from its custody.

Most reference departments would have no difficulty in filling the empty spaces left by the removal of books of either of the types described with materials that are really needed for reference. In the general reference room of an up-to-date library will be found not only the "Mudge books" that the library owns, but also copies of other books that have been found to be of particular reference value in that library. They may be the works of standard authors,¹ if there are many calls for the locating of poems and stories and the verification of quotations. They may be books on costume, if there are active dramatic organizations using the library. They may be college textbooks if there are questions on technical and scientific subjects from nonspecialists and students, or extensive treatises if the educational level or interest of inquirers is high or specialized. They may be histories and guidebooks if people besiege the reference desk with questions about other countries. Whatever book the librarian is constantly using to answer questions should be in the reference room or at the information desk.

Bound volumes of periodicals may also be included as reference books. Reference departments find it convenient to have sets of the periodicals most often referred to in or near the reference room, but it would be a pity to let the older

¹For discussion of the criteria for editions for reference use, see Carlson, Pearl G. *The Choice of Editions* (Chicago, A.L.A., 1942), especially p. 26-30, 66-69.

volumes of these keep out more active materials. Part of a periodical set may be retired to the stacks to leave room for good new reference works, handbooks, or textbooks. In general, the question of retirement of older reference materials from the reference department depends upon the space available and the use made of the older materials. As indicated before, old reference books are sometimes needed for answering a question, but this does not mean that they have to be kept in the reference room. They may be placed in a supplementary reference collection if the reference department has a section of stacks allotted to it, or they may be incorporated into the main collection of circulation books. It is an advantage sometimes to be able to say to a would-be borrower of a book from the reference collection that there is an older edition which he may take out and in which the particular article he wants is exactly the same or perhaps fuller than the one in the coveted book.

Preferred Location of Reference Room

The reference librarian's dream of the perfect large library building is one in which within or adjacent to the reference room are the card catalog of the library and the union catalog, a private reference office from which the head of the reference department can see and not be seen, and a spacious reference workroom, with the same combination of view and invisibility. Also near by are bibliography, periodical, map and document rooms, if these have a separate existence, the main collection of the library, and every subject division in a library so organized. Hovering in the perimeter, moreover, are a conference room and a typing room for the convenience of readers. To this central reference room there is easy access for the reader and a not too lengthy avenue to and from the cataloging and order departments. In a public library the children's and young people's rooms may be farther removed but not too far, for sometimes only a juvenile book will answer an adult's question.

And now comes the joker for the architect: The dream reference room is itself compact! There is to be no running an eighth of a mile from the census reports to answer the telephone. Neither does the room have balconies, for maneuvering book trucks up and down stairways is impossible, and running up and down stairs will soon run a reference librarian ragged. The small library may have its deficiencies in the matter of book collections and space, but at least it has the advantage for the person doing the reference work that everything he needs that is available at all is close at hand. The disadvantages of the large, combined reading and reference room have been well set forth by Yenawine.²

Of all the near neighbors desired by the reference staff the card catalog comes first, for it is their most important bibliographical tool, and also in many cases the best avenue of approach to the person who needs reference assistance and does not know where to go for it, if indeed he realizes its possibility. This last, undesigned use of the card catalog is one of the reasons why some reference

²Yenawine, Wayne Stewart. "Wanted: a Functional Reference Room," *Library Journal*, 62:237-39, March 15, 1937.

departments whose headquarters are unfortunately distant or hidden establish a second desk near the catalog. This is, of course, expensive from the point of view of administration, and an understaffed reference department can ill afford to man two desks at once. To the argument that members of the cataloging or loan department could just as well assist readers at the catalog the reply can be made that often the material needed cannot be found through the catalog but is in serial publications, for which indexes must be used, or in special files of uncataloged and unindexed materials, with which only the reference department is familiar. By far the best solution for the reference department is to place the main reference desk and the card catalog in proximity. Most of the forty-two plans in Hanley's *College and University Library Buildings*³ show the catalog much too far from the reference room, assuming that there is a reference desk and librarian in that room. (Of course, if the reference work is done from the circulation desk, the distance of the catalog from the reference room is no more serious than the distance between the circulation desk and the reference room.) The plan of the Franklin and Marshall Library,⁴ in which the catalog is located between the loan and reference desks with direct access from both, seems ideal in this respect, though a problem might arise in following such a plan if the catalog expanded greatly. (It is better to have the catalog adjacent to the reference room than actually in the room, because a card catalog in use is very noisy. The clack of a tray as it comes in contact with a counter and again as it is slammed back into the rack is much more disturbing to most readers than the hum of a fan or ventilator or even of conversation.)

(Second) only to the catalog is the bibliography room, if such there has to be, for bibliographies are only a special form of reference book. An open bibliography room is far preferable to a collection of bibliographies locked away in a cataloging or order department evenings and Saturday afternoons. Some libraries solve the problem of interdepartmental use of bibliographies by shelving them in a part of the reference room which is easily accessible from other departments. (Although readers use bibliographies less than librarians do, the former should be encouraged to use them more and should never be cut off from them at any time that the library's reference facilities are open to them.)

(The need for a reference office and a reference workroom is not always appreciated by people who have not actually worked in a reference department. Since the answering of reference questions is the primary function of a reference department, the onlooker does not realize the amount of preparation for that work which must be done and which is too untidy or too noisy or too demanding of concentration to be carried on in the presence of readers. A cluttered reference desk and assistants who appear too busy to attend to inquirers are repellent. Only at slack times should filing and indexing be done by assistants on "desk duty." The number of such hours will vary with the type and size and popularity

³Hanley, Edna Ruth. *College and University Library Buildings* (Chicago, A.L.A., 1939).

⁴*Ibid.*, p. 102.

of the library and with the time of day and the seasons. The inclusion of a working space large enough to house the required number of desks within a counter in a large reference room makes it possible to keep a reserve of one or more assistants to step quickly to the front when the person or persons detailed to answer reference questions either have to leave the enclosure or become so involved in questions that readers are kept waiting an unreasonable length of time. There is, however, an atmosphere of institutionalism about a counter that is more forbidding than a desk with a chair beside it, where the inquirer can be at ease while discussing his question with the reference librarian. In the smaller library the workroom and the reference librarian's office may be one, but the head of a large reference department needs a place to withdraw to for uninterrupted thinking, planning and conferences.

The need for closeness of the reference department to periodicals and circulating books is not recognized by some planners of library buildings who have the mistaken idea that reference work consists entirely of answering questions by means only of the books in the reference room. If it is necessary to place the reference room at a considerable distance from the stacks and the other book and periodical collections of the library, there is all the more need for placing the card catalog near the reference desk. Plenty of bibliographies and page service or mechanical communication will partially compensate for distance from the rest of the library's collection, but there is nothing that quite takes the place of consulting books as they stand on the shelves. Reference librarians who have been in the habit of frequent visits to the stacks feel that easy access to them is really essential to good reference work.

In a library departmentalized either by form or by subject of materials, some of the reference books will be found in these departments or divisions; periodical indexes in the periodical room, atlases and gazetteers in the map room, and reference books of all types in subject divisions. If these rooms and divisions are widely separated from the general reference room, some of these reference tools, especially indexes, will have to be duplicated. Most reference librarians like to have all the periodical indexes together and not scattered in different parts of the library because articles on various aspects of the same subject are likely to be entered in several indexes. Some encyclopedias and encyclopedic histories which are naturally shelved in a subject division should be also in the general reference room because their contents are much broader in scope than their titles indicate, for example, *Encyclopedia of the Social Sciences*, *New Larned History*, *Cambridge Modern History*, *Encyclopedia of Religion and Ethics*.)

The development of special accommodations for reference work as libraries increase in size is graphically portrayed in the chapter on reading, reference and study rooms in Wheeler and Githens, *The American Public Library Building*.⁵ Starting with the smallest library, in which adult reading, reference and open-shelf rooms are combined in one, they describe next the reference corner, formed

⁵Wheeler, Joseph L., and Githens, A. M. *The American Public Library Building* (N. Y., Scribner, 1941).

by a small reference desk and collection of reference books on near-by shelves. Then comes the reference alcove set off by a range of bookcases and finally the separate reference room, according to the type and size of population served. Their formula is that libraries serving populations over 30,000 or lending more than 300,000 books need a partitioned space for reference. Specimen plans of a library with a reference alcove and of libraries with separate reference rooms are included among the illustrations.

Information Desk

In large libraries where it is not possible to place the reference department in plain view of the main entrance it is customary to establish an information desk to guide people to the proper parts of the library for their inquiries. A few reference books may be kept at the desk for the answering of simple questions, especially if telephone calls are also first received here. The list of sixteen reference books which were at first placed on the telephone service desk in the Cleveland Public Library General Reference Division might be suggestive for an information desk.⁶

It should be noted, however, that these would have to be duplicated in the reference room and that the assistants at the Cleveland telephone service desk, being in the reference room itself, have easy access to a larger collection. Usually an information desk assistant, whether situated near the entrance to the library or near the card catalog, accumulates and compiles local directory and calendar materials. A daily newspaper of the community is also needed. In a university library may be added course syllabi and reading lists. The war information desks which began to be set up in 1941 naturally added many government publications and maintained clipping files and various special indexes.)

Classification of Books in the Reference Room

Practically any reference department would want near or on the reference desk the sixteen books listed by Gifford⁸ or their equivalents according to locality, as well as the other reference books mentioned in her article. The reference room is one place where books are not always shelved according to the call numbers assigned to them by the cataloging department. As noted before, it is usually thought desirable to keep all periodical indexes together regardless of their subjects. Other groups of books which it is more convenient to have shelved together than scattered by their classification numbers are the current biographical dictionaries and directories. At times there seem to be just two classes of people, "dead 'uns and live 'uns," and to find something on the latter the reference libra-

⁶Gifford, Florence M. "Books for a Telephone Service Desk," *Wilson Library Bulletin*, 16:15, September 1941.

⁷References to many articles on these war information centers are listed in *Library Literature*, published by H. W. Wilson Company, New York. *Library Literature* has been suspended for 1943 and duration of the war, with cumulative volume, 1940-42, to be published.

⁸Gifford, *op. cit.*

rian wants to stand in front of a collection of Who's Who's of various kinds, current biographical services and directories, in order to consult one after the other. Some reference librarians like to keep all encyclopedias together, general and special subject side by side. This indicates a tendency among them to arrange books by form instead of by subject, due probably to the facts that reference books, in the attempt to be comprehensive, are likely to overlap in subject and that reference questions may more easily be classified according to the kind of information or material wanted than by subject.

Although it may be possible for a reference department to put into operation a scheme of classification which groups reference books in this way, in most libraries this lack of conformity to the classification used generally by the library is questionable. It has its advantages for the reference department as long as books remain in the reference room, but its disadvantages for the rest of the library staff, especially in the transfer of books between the reference room and the stacks, would seem to outweigh the reference department's convenience. Another drawback is the confusion and annoyance of readers or staff members caused by finding books classified differently in different parts of the library. Instead of a special classification the problem is more usually met by temporary labels on the books which place them where the reference department wants them and which can be removed when books are retired to the stacks. Cross references in the reference department's own author or shelf list, notes on room plan or directory, and dummies on the shelves help the occasional reader who comes to the reference room seeking a specific book, for which he has taken a call number from the main library catalog, to find it if it is not in the expected place.

There are nearly always reference books which have to be withdrawn from open shelves. Some must be kept at the desk for quick reference. Others are books which sad experience has shown are likely to disappear or to be mutilated if the public is allowed unrestricted access to them. In some libraries, the reference department is requested to withhold certain books from groups of students. Probably no reference librarian relishes this sort of police duty or considers it effective, since it is difficult to prevent students from obtaining the books from the reference desk through their friends or perhaps from some other sources. The wise and tactful librarian will reduce this class of restricted books to a minimum by conference with the school or college authorities.)

Problems of Loss and Mutilation of Books

The problems of loss and mutilation cannot be solved by keeping a few books on closed shelves because one never knows where the lightning will strike next! Encyclopedias, census reports, atlases, periodicals, textbooks—anything which contains articles or tables or diagrams or maps or plates is subject to mutilation and to excessive wear, especially in libraries whose patrons include students. College and university libraries and public libraries in cities where there are colleges and universities and where school children frequent the reference room are the most afflicted.

A related problem is that of satisfying a large group of students assigned the same article in a periodical or reference book. Duplication of the complete book or volume of the periodical by purchase is expensive. Acquisition of single volumes of reference books or issues of periodicals may be impossible. Duplication of the article within the library by typewriting or photography, though less costly, may be impracticable due to copyright restrictions and it is subject to delay if permission to reproduce the material must be obtained. The best solution of these problems is to enlist the cooperation of the faculty. Methods of producing and caring for duplicate copies of articles, together with form letters used in securing faculty cooperation, are included in the practices of a hundred college and university libraries reported by the reference librarian of the University of California at Los Angeles.⁹ Public libraries have used similar methods and have succeeded in getting school teachers to modify assignments so as to prevent mutilation of reference and other materials. Loss of materials may be expected whenever the demand is much greater than the supply. A civil service examination will create a demand for civil service manuals and books on the subject of the examination which will quickly deplete certain shelves unless measures are taken immediately to put the materials wanted on reserve. The reference librarian in a public library must watch as eagerly as any unemployed person for announcements of examinations.

Attempts to gain the readers' cooperation may take the forms of signs posted in the library and notes attached to materials most susceptible to ill-usage. These may appeal to the instinct of fair play or to fear of penalties, according to the character of the readers. The removal of a few pages from a periodical, for example, may seem harmless to a person who has never thought of magazines as anything more than ephemeral stuff to be thrown away as soon as a new issue comes. All that such people need is a little instruction on the permanent value of a magazine and a reminder that others should have an equal chance to read it. It is harder to excuse mutilation of books and it would seem that only the threat of the law may deter people from removing articles from encyclopedias. Three examples of admonitory notes may be found in Gable's *Manual of Serials Work*.¹⁰ No library would wish to use signs and notes of these kinds unless driven to it by desperation, as they detract from the hospitable atmosphere usually desired.

Binding Reference Books for Convenience

The organization of the collection of reference books includes the binding of those which are issued in parts and the rebinding of those that need it. The paper presented at the American Library Association's Boston conference by the foreman of the New York Public Library bindery contains good advice and a list of questions on which decisions should be made before sending valuable and much-used reference books to the bindery. It is a wise remark with which he began his

⁹Coldren, Fanny Alice. "Destruction for Use," *College and Research Libraries*, 3:46-49, December 1941.

¹⁰Gable, J. H. *Manual of Serials Work* (Chicago, A.L.A., 1937), p. 165.

last paragraph: "The small library with limited funds needs to pay particular attention to its reference works."¹¹

(The reference librarian, however, is concerned with the binding of reference books not only from the point of view of their preservation but also from that of their convenient use. One has only to examine the backs of several encyclopedias to discover that the contents of the volumes of some encyclopedias are much more clearly indicated than others.) If two volumes are labeled "Eva to Fra" and "Fra to Gib" respectively, how is one to know without opening them which contains the article on Franciscans? There is no law, copyright or otherwise, compelling the owner of an encyclopedia to use, in rebinding, the same lettering that the publisher did. Cumbersome Roman numerals for volumes may be changed to unmistakable Arabic figures. (That the publisher of a yearbook did not think to mention a special index to previous volumes on the back of the issue containing it is no reason why the reference librarian should not have the information added. Anyone who uses reference books much can devise improvements in their binding which will facilitate their consultation.) The time saved in using a volume with legible and adequate labeling will more than compensate for the minutes spent in planning the necessary changes.

¹¹Thurman, William R. "Conservation of Periodical and Reference Volumes," *Library Journal*, 66:804, Sept. 15, 1941.

Nonbook Materials

Books are not the only kind of materials that reference departments have to organize for use. In some libraries current as well as bound volumes of periodicals are in the reference room. In others they are administered as a separate department. The same thing is true of the various kinds of audio-visual materials. Even when there are separate departments for all these, there are likely to be enough duplicates in the reference room to make necessary special provision for their use.

Pamphlets

The nonbook materials most commonly found in a reference room are pamphlets. The answer to the question as to whether they are to be classified, cataloged and shelved like books or kept as a separate collection, possibly arranged alphabetically by subject and uncataloged, depends upon the use to be made of them. If a given pamphlet is likely to be called for specifically it is much more easily and surely found if it has been treated like a book. This is especially true of pamphlets like *government publications* that have been listed in *subject bibliographies*, sometimes only by series title and number. If, on the other hand, readers are calling for information on current topics, a special collection of pamphlets in an information file arranged by subject is an extremely handy aid to quick reference service. The most satisfactory solution for libraries in which both kinds of questions come is to maintain the information file especially for ephemeral materials and either to duplicate the pamphlets in it which have individual authority or to list them under their authors, both personal and institutional, either in the card catalog or separately as an author index to the file. Since the pamphlets likely to be referred to in *subject bibliographies* are usually of permanent value, it would seem best to catalog and preserve one copy like books, in libraries where much use is made of *bibliographies*.

Whether a separate pamphlet collection for current reference questions should be shelved or kept in a vertical file is a controversial subject. Condit¹ and Smith² both discuss the advantages and disadvantages of the vertical file, agreeing that although it provides the better protection it is more expensive and takes more space than shelving. As pamphlets are generally limp, shelving

¹Condit, Lester. *Pamphlet about Pamphlets* (Chicago, Univ. of Chicago Pr., 1939).

²Smith, Margaret G. "Solving the Problems of a Pamphlet Collection," *Special Libraries*, 28:75-80, 110-15, March-April 1937.

them involves either binding or pamphlet boxes or pigeon-holed shelving. A table of statistics (source not given) in Condit³ shows that only ten out of 1049 special libraries in the United States and Canada used boxes while 729 used vertical files, 595 of the latter having four-drawer files. Presumably the boxes were regular pamphlet boxes and not the "orange boxes" which Ireland suggests may be used by small libraries that cannot afford a vertical file.⁴ Wheeler estimates, in discussing reference equipment, that eight or ten cases, four drawers high, are needed "per 100,000 circulation at branches; 10 to 15 per 100,000 circulation at centrals."⁵

The arrangement of a reference pamphlet collection is also debatable⁶ but it is probable that the alphabetical subject arrangement is used in more libraries than the classified arrangement, as the former seems less complicated to most people. In the Newark Public Library both arrangements are used, the alphabetical for the information file of current materials and the classified, with the famous color-band scheme, for the permanent collection.⁷

A great many articles on information files have been and continue to be published in professional library periodicals, some of which record the experiences of libraries suddenly awakened to the need of organizing or reorganizing their pamphlet files. These generally add nothing to what has already been published. Others are more valuable for suggesting sources of pamphlets than for describing methods of organization. The best-known aids for the latter purpose are the two principal lists of subject headings for files, both of which also include advice on equipment and preparation of pamphlets.⁸

The first list, based on the Newark Public Library practices, is the more extensive with a full scheme of cross references. The Ireland list is shorter and simpler, has few "see" and "see also" references and no "refer from" directions, but it includes separate lists of subdivisions to be used for local materials appropriate to city, county and state. School libraries and small public libraries most of whose reference work is for schools will find it better suited to their needs than the Newark list. Four lists of headings for a special group of subjects which are likely to be included in most libraries' files are presented in *War Subject Headings for Information Files*.⁹ A library that subscribes to the *Vertical File Service Catalog* has in it a current list of pamphlet subject headings. Those that do not would undoubtedly have the *Readers' Guide* or some other periodical index or

³Condit, *op. cit.*, p. 52.

⁴Ireland, Norma Olin. *The Pamphlet File in School, College, and Public Libraries* (Boston, Faxon, 1937), p. 96.

⁵Wheeler, Joseph L., and Githens, A. M. *The American Public Library Building* (N. Y., Scribner, 1941), p. 109.

⁶Condit, *op. cit.*, p. 53-59.

⁷Wenman, Lois Moore. "The Pamphlet Library in Newark," *Wilson Bulletin for Librarians*, 12:571-74, May 1938.

⁸Wenman, Lois Moore, and Richardson, D. G. *List of Subject Headings for Information File* (N. Y., Wilson, 1938).

Ireland, *op. cit.*

⁹Special Libraries Association. *War Subject Headings for Information Files* (2d ed., N. Y., The Association, 1943).

abstracting service which would suggest headings for recently developed topics for a special library. The *Pamphleteer Monthly* uses broad headings which are useful in selection but not as a guide to subject headings in a file.

One important practice that may be neglected by an inexperienced person is the dating of every item that goes into an information file. So many pamphlets are undated and so often the date is not included in a clipping that unless the habit of dating everything is established the file is likely to accumulate material of doubtful value because there is no way to determine its date.

Not all pamphlets in a reference room will be put in the information file. Certain ones, which are really small reference works of more or less permanent value, will be given stiff covers and shelved with books. Still others, like college catalogs, trade catalogs, seed catalogs, secondhand bookdealers' catalogs, will be kept together in whatever order is most convenient for reference use. Since many college catalogs are really books, either bound or in paper covers, they may be shelved instead of filed. Their arrangement will depend upon the approach most often wanted. For example, they might be arranged alphabetically by name, or geographically by county, region or state, or they might be arranged by type, as men's, women's, coeducational, liberal arts, technical, teachers' colleges. A simple alphabetical arrangement is probably best because educational directories may then be used to afford the other approaches.

To the reference librarian who is starting a trade catalog collection, or who has tried to make one and become discouraged, Granville Meixell's *Trade Catalog Collection*¹⁰ may be recommended. As the dean of Columbia School of Engineering said in the foreword, "When trade catalogues are competently handled by an experienced librarian they constitute the very finest source of this information [on equipment], when carelessly handled they are nearly valueless." Here again, although the catalogs may be arranged by subject, a simple alphabetical arrangement of manufacturers can be made to answer questions from the subject point of view by using *Thomas' Register of Manufacturers* as a subject index to manufacturers. A collection of bookdealers' catalogs, which may prove a very valuable source of information about old books, will need special indexing on account of the heterogeneous nature of their contents.

Periodicals

A periodical collection is often administered by the reference department, either within the reference room or in an adjoining room. It may include all the periodicals subscribed to by the library or only the more general ones which are indexed in *Readers' Guide* and the *International Index*. Considered as an adjunct to the reference collection, it is most conveniently arranged alphabetically, so that reference may be made directly to the magazine from the general periodical indexes without recourse to a catalog or check list for a call number.

Instructions and observations on the care of current periodicals are found

¹⁰Meixell, Granville. *Trade Catalog Collection* (N. Y., Special Libraries Association, 1934).

in considerable detail in Gable,¹¹ so that it seems unnecessary to repeat them here. Walter deals with the preservation of periodicals, including binding substitutes as well as binding.¹² Further directions are given in *Care and Binding of Books and Magazines*.¹³ A reprint of W. E. Reavis' articles on "Preparing Material for the Bindery" includes forms for binding slips and records, as well as advice and instructions.¹⁴

Whether or not the reference department has direct supervision over periodicals it is interested in their binding, chiefly because it wants to make sure that nothing is left out of the bound volume which should be included for reference purposes. Volume indexes must be secured and bound in. Advertisements that are valuable reference materials should not be discarded. People in charge of binding in both libraries and binderies generally do appreciate the importance of indexes, but they are likely to follow the custom of discarding all advertisements which are paged separately from the reading text of magazines, unless otherwise instructed. The inclusion of advertisements adds to the bulk and expense of bound volumes so that it is necessary to weigh carefully the advantages of preserving them. They may be used by writers, historians, teachers, play producers, designers, lawyers, economists, sociologists and others as historical data or evidence concerning the introduction and development of products, the founding and changes of business firms, manners and customs of certain periods and places. The pictures in advertisements are just as good as any other illustrations and often include subjects and objects not found elsewhere. It is up to those who do the reference work of a library to know whether the patrons of a library are being frustrated by the lack of these materials or would be benefited by their preservation.

In place of either binding or stacking the unbound numbers of a periodical together, a selection of the articles and pictures may be clipped for a vertical file and the rest of the magazine discarded. If the vertical file is a live part of the library's equipment, this method helps to prevent overlooking information, especially in magazines that are not indexed, although its efficiency depends upon the judgment of the selector and filer. Certainly, before periodicals are discarded, those who are responsible for the maintenance of files of pamphlets, clippings and pictures should be given the opportunity to salvage what they want.

Audio-visual Materials

Collections of audio-visual materials, although used in reference work, do not always form a part of a general reference collection. They are often administered as separate departments or attached to a subject department, as art, or to a

¹¹Gable, J. H. *Manual of Serials Work* (Chicago, A.L.A., 1937).

¹²Walter, Frank K. *Periodicals for Small and Medium-sized Libraries* (7th ed., Chicago, A.L.A., 1939).

¹³American Library Association. Committee on Bookbinding. *Care and Binding of Books and Magazines* (Chicago, The Association, 1928), p. 40-52.

¹⁴Reavis, W. E. "Preparing Material for the Bindery," reprinted from *Pacific Bindery Talk*, 11:8-11, 25-31, September, October 1938.

department serving special groups, as school teachers. However, in some libraries, even though departmentalized, the general reference department administers the main picture or map collection just as it does the periodicals.

The inexpensive, ephemeral, separate maps in a small general reference department are usually folded and filed with pamphlets, as most of them will be superseded. Maps of more permanent value need to be kept flat or rolled. Descriptions of suitable equipment for the preservation and display of these are in Wheeler and Githens,¹⁵ and a brief list of suggested aids to use in caring for maps is found in F. S. Allen's article, "Maps in the Library."¹⁶

The reference department in a larger library may have a map collection of thousands of items to administer. Sometimes a library which has never collected maps suddenly finds itself in possession of a gift of several hundred. The reference department, recognizing the use it can make of them, may, if the cataloging department has all it can do, have to organize and index the maps if they are to be used. The idea that maps can be classified and cataloged just like books is fast disappearing, but no generally accepted code has yet been published. It is therefore necessary that the person or department that organizes a map collection should have both a fundamental understanding of the principles of classification and a knowledge of the ways in which maps are called for by readers and may be used for answering questions. The little manual on the care of old maps by the curator of maps at the William L. Clements Library¹⁷ contains helpful suggestions on equipment for storing maps and discusses the principles on which maps, new as well as old, should be classified and cataloged. Thiele, in his *Official Map Publications*, also outlines principles of map classification and cataloging and describes the practices of some of the most outstanding map collection administrators.¹⁸ He has provided tentative map classification outlines by subject and by area, respectively.¹⁹ The most important bibliographical aids are listed by both Brown and Thiele.

Recent articles not listed by either Brown or Thiele include two in *Public Documents*, 1936, by S. W. Boggs, geographer of the United States Department of State, and Elizabeth T. Platt, the late map librarian of the American Geographical Society, describing the care of maps in the libraries of those two institutions.²⁰ Two other articles not listed in the above bibliographies have been published in the *Library Association Record*. One deals especially with the problems of cataloging, based on a study of the rules for cataloging maps in some of the larger British and American libraries and the writer's experience as librarian

¹⁵Wheeler and Githens, *op. cit.*, p. 464-65.

¹⁶Allen, F. S. "Maps in the Library," *Illinois Libraries*, 23:3-5, December 1941.

¹⁷Brown, Lloyd A. *Notes on the Care & Cataloguing of Old Maps* (Windham, Conn., Hawthorn House, 1941).

¹⁸Thiele, Walter. *Official Map Publications* (Chicago, A.L.A., 1938).

¹⁹*Ibid.*, p. 297-311.

²⁰Boggs, S. W. "Problems of Classifying and Cataloging Maps." In American Library Association, *Public Documents*, 1936 (Chicago, The Association, 1936), p. 107-15.

Platt, Elizabeth T. "The Map Department of the American Geographical Society." In *Public Documents*, 1936, p. 116-22.

of the Royal Geographical Society.²¹ The other discusses reference use especially of local maps.²² Although the latter naturally deals with English local conditions and uses English terminology, it can with a little imagination be adapted to American usage. The chief of the map division of the New York Public Library has contributed a brief and simple introduction to the subject for the small general library.²³

The simplest instructions for mounting, labeling and filing pictures are to be found in Ireland's *The Picture File*²⁴ and Giganti's article on pictures in a small library.²⁵ Fuller directions with forms and illustrations and diagrams of equipment are in Frebault, *The Picture Collection*,²⁶ and Corbett, *Illustrations Collection*.²⁷ The latter, although written and published in England, has the broader point of view and the advantage of summarizing the advantages and disadvantages of various methods used by both English and American libraries instead of advocating the practices of one library.

In choosing between the vertical files and boxes for storing pictures, Corbett concludes that the former are preferred where there is public access to the collection or where neither space nor expense has to be carefully considered. This applies to the ordinary file of illustrations clipped from periodicals, discarded books and advertising materials, supplemented by the less expensive commercial prints. The special cases which should be provided for expensive art reproductions do not usually concern a general reference department as they would ordinarily be housed in a special art department.

Both Frebault and Ireland include systems of alphabetical subject headings for picture files. Corbett argues in favor of the Brussels expansion of the Dewey Decimal Classification and gives directions for its application to pictures. The superintendent of one of the largest picture collections in the world defends the alphabetical subject arrangement in a review of Corbett's book, claiming that classification would prove useful only in special collections where all of the picture material is within one subject field.²⁸

To be of full value for reference a picture collection needs to be indexed minutely, for each picture may illustrate several things; for example, one picture may show costumes, period furnishings, utensils and some industry, and another may show scenery, animals, plants, buildings and means of transportation.

²¹Crone, G. R. "The Cataloging and Arrangement of Maps," *Library Association Record*, ser. 4, 3:98:104, March 1936.

²²Walton, Mary. "Suggestions for Making Fuller Use of Local Maps and Plans," *Library Association Record*, ser. 4, 4:354-57, June 1937.

²³Ristow, Walter W. "The Library Map Collection," *Library Journal*, 67:552-55, June 15, 1942.

²⁴Ireland, Norma Olin. *The Picture File in School, College, and Public Libraries* (Boston, Faxon, 1935).

²⁵Giganti, Carl J. "Pictures in a Small Library," *Wilson Library Bulletin*, 15:225-29, November 1940.

²⁶Frebault, Marcelle. *The Picture Collection* (5th ed., N. Y., Wilson, 1943).

²⁷Corbett, Edmund V. *Illustrations Collection, Its Formation, Classification and Exploitation* (London, Grafton, 1941).

²⁸Javitz, Romana. "Illustrations Collection," *Library Journal*, 67:44-45,

Minute indexing, however, is an ideal which not many reference departments can approach. Examples of such indexing are described and illustrated in a brief article by the founder of a commercial illustration service.²⁹ Sample cards for similar indexing are given in an article on the Canadian National Film Board Library.³⁰

To make the same picture collection usable for both school teachers and the general public requires a good system of cross references, either within the file or in a list of subject headings, because the teachers want pictures grouped under large headings following the school curriculum and other people generally want pictures of specific objects. The same is true of lantern slides and film strips. This is the reason that there is little uniformity between collections of slides: Some are classified by the D.C., some by the L.C., and some by an original classification. A description of one of the outstanding examples of the last category, the one used for the collection in the Ryerson Library of the Chicago Art Institute, is included in an article discussing the problems of cataloging slides.³¹ Cataloging of slides is more customary and more detailed than the cataloging of a picture collection, in order to prevent too much handling of the slides. Putting a print of the slide on the catalog card, which is done for some collections, lessens the amount of descriptive information needed and makes identification of the slide wanted more sure. A summary of articles on filing and cataloging various kinds of visual materials is included in *Motion Pictures in Education*.³² A good introduction to the care of films is the chapter on "Training for Library Film Service," followed by a suggested reading course, in *Educational Motion Pictures and Libraries*.³³

For both pictures and slides a good share of the work of organization involves verification and identification, a process very germane to the functions of a reference department. The curator of a special collection of pictures or slides usually builds up a collection of reference books to help in this part of his work, but the member of a general reference staff, having at his command the whole reference collection, does not need to be limited to any special group of books, although, naturally, he will soon discover which are the most useful for this purpose.

The library professional literature on the care and indexing of phonograph records consists chiefly of articles in the *Library Journal*, the *Wilson Library Bulletin*, and *Music Library Association Notes*, on the practices of various libraries in the care of musical records. The only publication approaching a manual

²⁹Bettmann, Otto. "A Picture Index," *Wilson Bulletin for Librarians*, 13:536-37, April 1939.

³⁰Brunke, Elizabeth D. "The National Film Board Library," *Ontario Library Review*, 26:405-10, November 1942.

³¹Kohn, Lydia Elizabeth. "A Photograph and Lantern Slide Collection in the Making," *Library Journal*, 57:941-45, Nov. 15, 1932.

³²American Council on Education. *Motion Pictures in Education* (N. Y., Wilson, 1938), p. 87-91.

³³McDonald, Gerald Doan. *Educational Motion Pictures and Libraries* (Chicago, A.L.A., 1942).

is a code for cataloging musical records, "designed as an integral part of the larger 'Code for Cataloging Music.'"³⁴ The reference use of records other than musical is so incipient that no reports appear to have been published on their organization. The discussion of methods of storing records in the *Code for Cataloging Phonograph Records* would apply to records of any kind.³⁵

³⁴Music Library Association. *Code for Cataloging Phonograph Records* (Washington, D. C., The Association, 1942). Preface.

³⁵*Ibid.*, p. 18-20.

Special Collections

Difference between a Special Collection and a Subject Division

The special materials whose organization for reference use has just been described are segregated because of peculiarities in their forms which make it impracticable to incorporate them with books or with one another. Each group, if in a given library it comprises any considerable number of items, requires special equipment for its lodging, special systems for its arrangement, and special rules for its indexing. Another quite different kind of grouping is the "special collection," which may be set apart either as a separate department or as a division of the reference department. This is *not* the same as the "subject division" found in some public libraries, or the departmental reading room of a university library. Either of these is a segregation of a part of the materials in a given subject field in the library, which have been selected or organized for the purpose of meeting the needs of special groups of readers of the present time. Most of the materials in a subject division are, or should be, fluid. As newer and better books or pamphlets are acquired, those they supersede are either discarded or retired to more or less "dead storage." In the special collection, on the other hand, it is expected that all materials will be preserved for posterity and that so far as possible all materials within the clearly defined scope of the collection will be acquired if possible. Everything is gathered in, good, bad and indifferent, and nothing is ever discarded unless it be a poorer copy of a publication of which a more nearly perfect copy of an identical edition has been acquired.

A special collection may have a humble beginning, as when the reference librarian assembles in one place in the vertical file all pamphlets and clippings on the locality¹ and sets aside a shelf or two for histories, biographies, directories, descriptions of the town, city or county in which the library is located. Presently it is found that there is enough to fill an alcove or a corner of the reference room; next comes the search for a separate room; and then pleas for yet larger and larger quarters. By this time the special collection has probably acquired a separate staff to administer it.

The Local Collection

A special collection may be in any field, but the type most generally found is the local collection. Local collections differ from one another, as they reflect the life

¹Wells, D. M. "The Local History Clipping File," *Library Journal*, 63:189-91, March 1, 1938.

of the community. The local collection in a quiet old New England town is likely to stress town and family histories, biographies, and genealogies, old newspapers, personal papers and diaries, thereby attracting the attention and the aid of patriotic societies and antiquarians. That in a neighboring industrial city makes a specialty of collecting the catalogs of the local manufacturers, the publications of the municipal government, all newspapers and periodicals published in the city, programs, posters and so forth. The one has its eye on the past and the other on the present. Both, however, should have an eye to the future, for the former must make the effort to collect contemporary materials and the latter should carefully preserve those it has collected for present use for the benefit of historians to come.

Local collections differ also in geographical scope, some including only the city and others the county or state in which the library is located. The limits of the local collection in a college or university library, on the other hand, may be drawn closer to the boundaries of the campus. Each one should meet its own needs and fit into the pattern of the local collections of the region. The public library should not compete with the historical society, nor the university library with the university archives. In some public libraries the local collection may serve also as a municipal reference department.

As to what material shall be segregated in a local collection the librarian of the Edinburgh Public Libraries, where there is a noted local collection, makes the rule that all print and manuscripts contributing to the knowledge of the defined locality, except local material assigned for the convenience of readers to other parts of the library, should go into the local collection. His examples, though applying especially to Edinburgh, are illuminating. They include such obvious ones as the attraction of books by and about Sir Walter Scott to literature, about Raeburn to art, about Mary, Queen of Scots, to national history, while maps of Edinburgh are kept in local history.²

All kinds of materials may be represented in local collections: books, pamphlets, periodicals, maps, pictures, various kinds of photographic reproductions of rare materials, photographs of buildings and streets, moving pictures of ceremonies and parades, phonograph records of speeches and transcriptions of radio broadcasts, manuscripts, including letters and pressbooks, and bound and unbound documentary records—even objects which some librarians consider to belong more appropriately to an historical museum. The one point in which their care differs from that of similar materials in other parts of the library is that nothing is thrown away but everything carefully preserved and indexed. The only ways in which the custodian of a local collection can legitimately make room for new materials are to secure additional storage space and to transfer materials to some other library or historical collection. The implications as to what this means in determining the scope of the collection, allotting quarters in the library and providing special equipment should be evident. Nevertheless no library should shrink from starting such a collection if there is none in the community

²Savage, Ernest A. *A Library of Local History and Affairs* (London, Grafton, 1939).

already, as it has an obligation to be better able to answer reference questions about its own community than any outside library. If necessary, the scope of the collection may be narrowed either geographically or as to forms of material collected. Sometimes the field is divided by agreement between two or more libraries or organizations in the community or region so that no one will be overburdened, each will know just what to expect to find in the others, and unnecessary duplication will be avoided.

The one manual on the care of local collections is by the chief librarian of Croydon, England.³ It deals with the organization of the various types of materials, including manuscripts, and appends a bibliography which lists American as well as British articles on the subject. In lieu of a regular manual on local collections especially for American librarians the study made by a Canadian librarian at the Department of Library Science, University of Michigan,⁴ may be used because it outlines the kinds of materials most often found in American local collections, summarizes the special treatment and care given them, and stresses the principles on which a local collection should be arranged and cataloged, that is, indexed. It also includes a selective bibliography. A "workable plan" for the organization and care of manuscripts in a local collection has been described by the former head of the manuscripts division of the University of New Mexico Library.⁵

Here is the part of the library in which homemade reference books flourish, not only bibliographies and indexes but actual compilations of an encyclopedic nature, as well as works based on historical and sociological research, for the librarian really interested in a local collection will find means of securing and recording information that has never been printed. A suggestive article along these lines is Olive M. Ryder's paper delivered in Los Angeles in 1935.⁶

The "Documents Collection"

Another special collection which in some libraries is under the supervision of the reference department is the collection of government publications. Since a government publication may take any one of the shapes of materials that go to make up a comprehensive reference collection, it appears to many librarians that there is no excuse for a separate "documents collection," as it is generally, though inaccurately, called. Possibly, if Americans had not been blessed with better laws for printing their country's documents and more ingenious and more conscientious superintendents of documents than most governments, these divisions in libraries

³Sayers, W. C. Berwick. *Library Local Collections* (London, Allen & Unwin, 1939).

⁴Murray, Florence B. "The Contents and Catalog of a Local Collection with Special Reference to Subject Headings." In American Library Association, *Catalogers' and Classifiers' Yearbook No. 4, 1934* (Chicago, The Association, 1935), p. 110-26.

⁵Jackson, Ellen. "Manuscript Collections in the General Library," *Library Quarterly*, 12:275-83, April 1942. This includes a bibliography of books and articles on the care of manuscripts and archives.

⁶Ryder, Olive M. "Local History Surveys." In *Proceedings of the Institute for Librarians and Sixth District California Library Association Business Meeting . . . 1935* (Los Angeles, Univ. of Southern California, 1936, mimeo.), p. 35-39.

would be fewer. It is largely because of a combination of excellent indexes and a workable special classification that reference librarians who have used a separate collection of United States government publications cling to the idea. If a reference to a government publication is found in one of the official indexes the publication can be located more quickly in a documents collection than if one has to take the extra steps of looking up a call number in the library's card catalog—and it is not always easy to make the transfer from the Superintendent of Documents' author entry to the Library of Congress or other catalog entry⁷—and fetching the publication from some distant corner of the library.

The reason that reference librarians like a separate documents collection is the same as that which causes them to make up "Granger sets"⁸ for the reference room or shelve the periodicals indexed in *Readers' Guide* in an alphabetical group by themselves—simply convenience. To this the rejoinder may be made that the reference librarian is not the only person in a library who makes use of government publications and his convenience is not the only factor to be considered. A documents collection is a closed book to most readers and even to most members of a library staff and it has to be opened to them by those who administer it. Certainly, in an open-shelf library, government publications will be read by more people if they are kept with other materials of their form and subject: *Survey of Current Business* with the other business periodicals, *Bulletins* of the Office of Education with other books on education, a *Farmers' Bulletin* on pansies with other pamphlets on flowers. As a matter of fact, in libraries which maintain a separate documents collection such works as these can usually be found classified or filed by subject, being either duplicated or represented by dummies in the documents collection. Even though a reference department itself administers a documents collection, it will extract publications like the *Statistical Abstract*, *Congressional Directory*, and *Yearbook of Agriculture*, for the regular reference shelves.

From the reference librarian's point of view the entirely separate documents division has the same double-faced disadvantage as a separate serials division: that the persons in charge are likely to try to answer questions from their own collection which could be more quickly, and often as satisfactorily, answered by means of other materials and that other members of the staff do not appreciate the special type of material and fail to consult it or refer readers to it. On the other hand, to keep a documents collection complete and up to date requires the whole attention of a special staff. Of course, the existence of a division to handle the acquisition and cataloging of government publications does not preclude their amalgamation with the rest of the library and their availability to the reader through the aid of other members of the staff. However, there can be no doubt that the persons who are most familiar with current government publications through handling them are the best fitted to service them, since the official indexes

⁷This transfer may be facilitated by the use of George A. Schwegmann's *United States Author Headings, Including Those Adopted by the Library of Congress Appearing in the Union Catalog* (Wash., Govt. Print. Off., 1936).

⁸Books indexed in *Granger's Index to Poetry and Recitations*.

cannot be relied on for up-to-date information on account of their tardiness.

Although a library which selects government publications one by one in the same way as trade books will probably catalog each one as fully as any book, a study made by the documents librarian in the Oklahoma Agricultural and Mechanical College⁹ shows that ten presumably well-cataloged libraries with *extensive* holdings of United States government publications do not analyze them in their catalogs adequately, with the result that the official indexes must be used in order to find all the information that is available. This points to the need in a large library of a complete "battery" of indexes, departmental as well as those compiled by the Documents Office, shelved conveniently to supplement both the card catalog of the library and the indexes to periodicals. Even if there is a separate documents division, the general reference department needs to be able to consult the indexes as readily as periodical indexes, for one never can be sure whether the desired information is to be found in a magazine or a government bulletin. If the library has separate sets of the parliamentary papers of Great Britain and other foreign countries, their indexes should also be close at hand in both reference and documents departments. Conversely, since government publications are often indexed in special periodical indexes before the official government indexes including them appear, a documents division doing reference work would also need periodical indexes.

The arguments for and against a separate documents collection are summarized by Ruth M. Erlandson in the second edition of Boyd's *United States Government Publications*,¹⁰ and opinions of librarians in the larger research libraries are quoted in *Public Documents*, 1935.¹¹ The reference department that administers a documents collection will also find in Boyd a description of the records it will need to keep¹² and a list of references on the care of government publications.¹³

If there is no separate documents collection or division and government publications are scattered through the library, the reference department should make sure that at least one copy of every issue of a government series which comes into the library is recorded somewhere under the author and title of the series. Then, if a reader asks simply for "Fishery Circular no. 19" it can be found, whether it stands on the shelves with other publications of the U. S. Fisheries Bureau or is classified with cookbooks or is in an information file under fish or

⁹Campbell, Grace A. *A Study of the Extent to Which Existing Printed Government Indexes and Catalogues Can Replace the Card Catalogue in Making the Contents of Federal Documents Available*, Oklahoma Agricultural and Mechanical College, *Library Bulletin* no. 7, November 1939.

¹⁰Erlandson, Ruth M. "The Organization of Federal Government Publications in Depository Libraries." In Anne Morris Boyd, *United States Government Publications* (N. Y., Wilson, 1941), p. 510-12.

¹¹Windsor, Phineas L., and Boyd, Anne Morris. "The Objectives and Content of Public Documents Courses." In American Library Association, *Public Documents*, 1935 (Chicago, The Association, 1936), p. 183-86.

¹²Boyd, *op. cit.*, p. 499-500.

¹³*Ibid.*, p. 519-20.

cookery. Any library which has not been designated as a depository for United States government publications is free to discard them just as it does any book or pamphlet. Special care, however, should be taken that nothing of probable reference value to that library is discarded, for it is very difficult to replace some government publications a few years after they have been published. Soon after the United States entered World War II some librarians were wishing they still had some of the government publications which were in their files at the close of World War I, twenty-four years before. A documents collection, if it is administered as a special collection, is a safeguard against the discarding of valuable documentary materials in a library which is not a research library that automatically preserves "everything." In fact, this is a more cogent argument in favor of a documents collection than the convenience of reference.

Aids to Reference Service

Various Uses of the Card Catalog

The most important aid to reference service is made not by the reference department but by the cataloging department. The statement that the card catalog of a library is its most important bibliographical tool is perhaps becoming trite, and is in danger of becoming obsolete, but one must not run the risk of its being overlooked. More than that, it is a *biographical* reference work as the reference librarians of two university libraries have ably demonstrated.¹ Its history subject cards are outlines of historical periods. Its subject "see" cards may even be used to supplement synonym dictionaries if the cataloging department keeps its list of subject headings up to date. It may be used to find the location of a learned society. The peregrinations of a bureau of the government can be traced in catalogs that include "history cards" for government publications. For here are recorded the results of the cataloger's reference and research work. The library school student who wishes to do reference work must not fail to learn all he can about cataloging. It is often said that the best preparation for reference work is cataloging experience, for on the reference librarian's knowledge of the intricacies of that subject will depend a large measure of his success.

Supplementary to the card catalog are published bibliographies and indexes and those made by the reference and other departments. Bibliographies made in the library have the advantage of indicating the location of the materials in the library. To be sure, it is possible to add the call numbers and location symbols to the entries in other bibliographies to make clear just what is available to the reader as well as where it can be found. However, some reference librarians object to the practice because, if the call number or location of a book is changed, it is very hard—practically impossible if many subject bibliographies are so marked—to get the corrections made in every bibliography in which the book may have been listed.

Location and Arrangement of Published Bibliographies

The question of the best location and arrangement of published bibliographies is hard to answer. Their utility as supplements to the card catalog suggests that they

¹Mudge, Isadore Gilbert. *Present Day Economics in Cataloging*, reprinted from *Proceedings* of the 56th annual conference of the American Library Association, June 1934; originally appeared in *A.L.A. Bulletin*, 28:579-87, September 1934.

Ver Nooy, Winifred. "The Consumer and the Catalog." In William M. Randall, ed., *The Acquisition and Cataloging of Books* (Chicago, Univ. of Chicago Pr., 1940), p. 310-30.

be shelved near it. Certainly, comprehensive trade bibliographies and library catalogs and indexes to the smaller units of literature (plays, stories, poems, essays) belong with the card catalog. Subject and author bibliographies, on the other hand, may be more advantageously shelved with the books about their respective subjects and authors, as they are often thought of as supplementing what has already been assembled by the library's classification. In some libraries, however, all bibliographies are brought together in one group, which is a more convenient arrangement for the person seeking to verify an incomplete reference, who may find it necessary to consult both national and subject or author bibliographies. The reference librarian will have to consider for which purpose the bibliographies in a given library are more often consulted before deciding how to arrange them in the reference room.

Bibliographies and Indexes Made by the Reference Department

Almost all reference departments make bibliographies. Many of them are prepared in answer to special requests or in expectation of requests and are mere compilations which bring together in one list references which are scattered in the card catalog, published bibliographies and general indexes to periodicals, books and government publications. The chapter on practical bibliography in Shores' *Basic Reference Books*² and Higgins' beginners' guide³ furnish directions for this kind of bibliography. Large or special libraries are more likely to make real contributions to bibliography, by including references to material which is not indexed elsewhere.⁴ The latter are often worth publishing so that more than one library may reap the benefit of the work done.⁵ It seems like a waste of effort when several libraries produce bibliographies on the same subject, unless their resources are so different that there is not much duplication. This duplication of work happens most often with topics of current interest when a sudden and urgent demand does not allow time to discover and secure bibliographies from outside. For information on the projection and progress of bibliographies of a less ephemeral and more learned nature the Bibliographical Society of America acts as a clearinghouse through its *News Sheet*.

In addition to bibliographies, which are usually brought to a conclusion as of some given date, reference departments usually have on hand some indexes and other compilations which "go on forever." Here the reference librarian has the responsibility first of making sure that he is not duplicating what is already in existence, which might be acquired more cheaply than it could be made. For

²Shores, Louis. *Basic Reference Books* (2d ed., Chicago, A.L.A., 1939), p. 236-52.

³Higgins, Marion Villiers. *Bibliography* (N. Y., Wilson, 1941).

⁴For a philosophical introduction to problems met in this kind of bibliographical work see Schneider, Georg. *Theory and History of Bibliography*, tr. by Ralph R. Shaw (N. Y., Columbia Univ. Pr., 1934).

⁵For practical directions on preparing bibliographies for publication see:

Van Hoesen, Henry Bartlett, and Walter, Frank K. *Bibliography* (N. Y., Scribner, 1928).

MacPherson, Harriet D. *Syllabus for the Study of Bibliographical Method* (3d ed., N. Y., Columbia Univ. Pr., 1942).

example, no one would think of producing a title, author and first-line index to the poems in the books indexed by Granger, though he might make a refrain or a subject index of them; or he might index the poems in books not covered by Granger and other such indexes. To the obligation of knowing what indexes are already published may soon be added that of discovering whether an index contemplated has already been made by some other library and might be available for copying or consultation by proxy, since the Junior Members of the American Library Association are compiling for publication a subject index to several thousand "local indexes" in libraries over the country.

Besides avoiding duplication the reference librarian should be sure that his projected index will fill a real need. Time should not go into indexing for the mere joy of indexing or for the sake of providing "busy work" while waiting for questions. It can be better spent examining records of unanswered questions to determine what kinds of material or subjects need indexing in a specific library.

A third principle to be observed is the formation and following of a systematic plan for the work. A so-called "index" made up of entries for information found in answer to specific inquiries may prove useful when and if the same inquiries come again, but this is a by-product of the record of work done and is not a planned index of the kind meant here. To be satisfactory for the new question an index must be depended upon to have indexed certain books thoroughly so that they may then be eliminated from the search, or to have carefully recorded all information discovered on a definite subject, for example, all references to the home town, wherever seen. A subject index ought also to have a scheme of uniform entries like the Wilson indexes and not depend for entries upon the various captions under which items have been found. The latter practice in the nineteenth-century indexes produced references to articles on the English theater under such variant entries as England, London, theater, stage, English, British.

One index which any reference department might profitably make continuously is of special reference features or departments in serials; for example, "Among the New Words" in *American Speech*; notes and queries in periodicals like *Hispania*; employment services such as the one in the *American Journal of Public Health*; lists of special types of materials, like the publications of various governments included in the bibliography of source material in *Foreign Affairs*,⁶ and the directories, necrologies, records of research in progress or published, chronologies and calendars of meetings found in many professional journals.

Data Compilations

Indexes, though the most common, are not the only form that homemade reference works take. Instead of indexing the material, the reference department may cull and copy data from various sources,⁷ forming what special librarians call

⁶For a list of 23 periodicals which regularly list articles in other periodicals see Spalding, M. E. "Reference Work in a Periodical Room," *Wilson Bulletin for Librarians*, 11:21-24, September 1936.

⁷Special Libraries Association. *Contributions toward a Special Library Glossary* (N. Y., The Association, 1943), p. 5.

"data compilations." The Junior Members' subject index of local "indexes" as published for individual states includes many compilations other than bibliographical references, such as lists of members of a state legislature for a century, of covered bridges or water mills in a state or of manufacturers in a city. Some of the so-called indexes are made up of clippings, for example, blurbs, which form a biographical dictionary of new authors. One reference department at least has compiled and published a small biographical dictionary of the authors of its state.⁸ Others have supplied the deficiencies of their local governments by compiling manuals or directories of the municipal departments, their functions, personnel and addresses. Naturally many of these reference works are local in scope and, if the library cannot afford their publication, remain unpublished because they would not appeal generally to the book trade; but they are often of interest to other libraries in the same region. Some of them are of nationwide interest. Certainly it is wasteful for several libraries over the country each to compile its own index to some one well-known reference work or series or to the works of some author of international fame. Just how many libraries indexed Racinet's *Le Costume Historique* years before the *Costume Index* was published is not known, but the reference librarians of at least two libraries looked before they leaped and got permission to copy the index that a third library had compiled. Cooperation of this kind should be one of the outcomes of the subject index of local indexes.

Record of Answered Questions

Although a record of the answers to questions that have been hard to find is not an index in the proper sense of the word, it may be an aid to reference service, provided good judgment is exercised in the choice of questions to be thus recorded and of the headings under which they are filed. It should be kept on cards and should be revised from time to time because new publications may supersede the materials consulted when the question was first asked. It is perhaps more effective as a reservoir from which to draw questions for training and testing new assistants or students in library school than as a direct aid to reference service.

Mechanical Aids

One way in which a reference department can aid the self-service of readers is to provide directories of the reference materials in the reference room and elsewhere in the library. These may be in the form of lists of subjects and kinds of materials with their location indicated by classification and room, alcove, or section numbers, or of a plan of the reference room or rooms on which the location of the main groups of materials is indicated. A combination of plan and directory can be devised if the library is not too large. Signs and shelf labels also are a help in directing readers to the books they need. Special stands for much-used reference books, like the one-volume unabridged dictionaries, atlases, directories and gazetteers, make it easy to point these out. Moreover, if readers are forced to

⁸Scott, Lorene L., comp. *Colorado Writers, First Series* (Denver, Denver Public Library, 1939).

stand to consult such books the possibility of one person's monopolizing their use is minimized in a crowded reference room. Likewise, any device for keeping volumes of the *Readers' Guide* and other periodical indexes in order is a help to reference service. The books may be fastened in place on a table or counter or they may have pigeon-holed shelves of the proper spacing for the various thicknesses of volumes with labels to correspond to the dates on backs of the volumes.

ORGANIZATION AND ADMINISTRATION OF REFERENCE SERVICE

The Reference Staff

Of Equal Importance with Books

✓The possession of the right books and the knowledge of how to use them are two things essential to the success of a reference department, and the latter is no less important than the former. The ignorant assistant can render comparatively useless the finest collection of reference books, while the skilled assistant, who knows how to get from each book all the varied kinds of information that it is planned to give, can show astonishing results even when limited to only a few basic books.¹ ✓

So says *the* authority on reference books. The provision of people on a library staff who can do reference work, in other words, is as much a duty of the administration as the provision of reference materials. A library may not have a separate reference department because its staff is not organized into functional departments or because some other department, like circulation or cataloging, handles also the reference work, but it should have on its staff someone who is responsible for seeing that reference service is rendered as needed. From a discussion of the problems and principles of the organization of a reference staff may be derived also ways of handling the reference work in a library which lacks a reference department.

Factors To Be Considered in Determining Size

In organizing a reference staff the first question an administrator asks is: How many people are needed? This recalls the question said to have been asked the young lawyer Lincoln: How long should a man's legs be? To which he replied that they should be long enough to reach from his body to the ground. There should be at least enough people assigned to reference duty in a library to handle all questions promptly and efficiently as the needs of the clientele demand. This is a minimum requirement only and implies more than lies upon the surface, for in order to handle questions *efficiently* it is necessary to have more people than can "cover" the reference desk.

Many factors should be considered in determining the number of people needed for reference service in a given library. Among these are the size, character and habits of the clientele, the size and ability of the whole professional staff, the amount of clerical and page help provided, the plan of the library building,

¹Mudge, Isadore Gilbert. *Guide to Reference Books* (6th ed., Chicago, A.L.A., 1936), p. 2.

the kinds of reference service called for in that library, the number of hours the library is open to the public, the number and spacing of reference questions.

Statistics of the number of questions asked during certain periods of the day for each day in the week should reveal whether it is necessary to have someone on duty for reference work all the time, and at what periods, if any, two or more persons are needed. In some libraries the lunch hours are particularly busy because a number of readers may avail themselves of a free period to do personal errands, including a visit to the library to look up information. But in libraries connected with isolated institutions it is conceivable that there might be no questions asked in the lunch hour because everyone is forced to eat at the same time or go hungry. In the general run of libraries, however, there should be someone capable of answering reference questions available to the public during all the hours in which the library is open. This does not necessarily mean that a reference librarian has to be on duty at the reference desk every hour. A sign at the reference desk may refer the inquirer to another desk or, if available, a competent member of another department may be assigned to the reference desk to relieve a small reference staff. It is evident that the plan of a library building is a factor to consider. An isolated reference room may necessitate more constant attendance than one which can be supervised from the circulation or information desk,¹ but this again depends upon the maturity and honesty of the clientele.

The number of persons needed in attendance at the reference desk at one time depends partly upon whether the questions asked require long searches in different parts of the library, partly upon whether page service is supplied, and above all on the pressure of the inquirers. The latter should neither be kept waiting more than a minute or two nor served so hastily that their specific needs are not supplied. It makes a reference librarian wince to read the judgment pronounced on reference departments by an American Library Association commission that their "assistance is frequently hurried and impersonal."² The failure to provide enough qualified reference librarians to give the requisite amount of time to each inquirer is the primary cause of "hurried and impersonal" reference service (a phrase which is really a contradiction of terms).

A Committee on Standards of Reference of the Librarians' Council of the San Francisco Bay Region reported in 1937 as follows:

The disadvantages of overload are many and far reaching in their effect upon the library's services. . . . Mental and physical fatigue often induce nervousness or irritability. Service to the public may be inadequate because of failure of the reference assistant to be as well informed as she needs to be, because of the division of her attention occasioned by other work requiring performance at the desk, and because of the breakdown of proper attitude consequent upon fatigue and nervousness. To the individual reference department it may mean inability to organize its work along special lines either by establishing subdivisions or by developing specialization on the part of its workers, inability to inaugurate new projects or new services, inability to expand in power and usefulness.

²American Library Association. Commission on the Library and Adult Education. *Librarians and Adult Education* (Chicago, The Association, 1926), p. 48.

Thus both for the library organization and for the individual library worker may initiative and progress be made difficult if not almost impossible.³

For two reasons the reference staff should be large enough so that no member will have to devote all his time to answering reference questions. In the first place, there is work to be done away from the desk in selecting and organizing reference materials, compiling bibliographies, "searching" difficult questions, and other duties which may fall to the department and which should be divided among its members. In the second place, almost no one can keep up his full efficiency answering reference questions that follow one another in quick succession for more than two or three hours at a time. The mental gymnastics required in the rapid readjustment of thought and memory to a great variety of subjects is very fatiguing and in spite of all efforts to keep his wits alert the average reference librarian will find them faltering in the third or fourth hour of a busy session at the reference desk. If there are several minutes between questions, he should be able to carry on alone for a longer period without losing his mental agility.

To determine the number of reference assistants needed in a given library, therefore, requires a study of the particular situation, including statistics of the number of questions each hour of the week, and the time it takes not only to answer them but to carry on the other duties of the reference department. If a reference department is not giving satisfactory service, which means *unhurried, personal* attention to each inquirer, a careful scrutiny of the administrative setup may disclose points at which reference assistants' time is wasted by taking steps which a page might take, by copying lists or writing letters that a typist might do, by writing subject headings on pamphlets or stamping dates on periodicals that a clerk might do, by making statistical tallies that a machine might make.

Selection of Members

Having decided upon the number of reference assistants needed, the librarian's next step is the selection of the individuals in such a way as to create and maintain a perfect team. The quotation at the head of this chapter indicates that the first requirement of a reference assistant is ability to get the most out of the available reference materials. This skill comes partly from native endowments and partly from experience, whether directed by instruction or gained by experimentation in practice.

Since reference work generally demands a wider knowledge of the literature of many subjects than one person can usually be expected to have, one principle to follow in building up a reference staff is to try to select people with as many different specialties as possible. Even in libraries which have subject divisions there is still room for specialization both within each division and in the general reference department. The members of the staff of a business division may specialize in the different kinds of business, for example, advertising, banking, insurance. The members of a general reference department in such a library,

³MS, p. 4.

if there is no subject unrepresented in its divisions, can develop specialization in types of materials, such as maps or pamphlets. Linguistic abilities can be divided and spread out over the department if care is taken in adding or replacing assistants to see that the new assistant knows some language in which the rest of the department is weak. Handling many questions rapidly and searching out obscure information require somewhat different personal characteristics. These may not be combined in equal amount in any one person, but if they are represented in varying degrees by different members of the department they may make it a composite of a perfect reference librarian, provided, of course, that the administration recognizes special abilities and that individual members pull together. Attention might be called here to the possibility of furnishing expert reference advice in special subject fields, in libraries that are not organized into subject divisions, by subject specialization on a large reference staff.⁴

Above all, in a reference department there must be congeniality and cooperation. Two types of reference assistants unpopular with their colleagues are the one who lets another work for a long time on a question to which he himself had found the answer for someone else previously, and the one who in the presence of a reader corrects or supplements information given by another assistant. Certainly, each member of the department must be ready to share his knowledge with the rest when the occasion demands, but in such a way as not to seem officious or to embarrass the person handling the question. Moreover, each must be willing to acknowledge his need of help if keeping a question to himself means unnecessary delay in serving a reader.

Qualifications needed for answering reference questions effectively have been discussed in the chapter on "Technique and Methods." The characteristics of a good reference librarian are described in considerable detail in Wyer's *Reference Work*.⁵ It would seem unnecessary to add any to the twenty-seven traits of "first importance in reference work" listed there, and probably everyone who has done reference work would agree that all are desirable though seldom all found in one person.

There is no doubt that, given equal native qualifications, the reference librarian without library school training who has had several years' experience in a library can render better service in that library than the recent, inexperienced graduate of a library school or even one with a brief experience in some other library. In no occupation does one learn more on the job than in reference work. It is equally true, however, that a beginner in library work will be better able to do reference work if he has had the benefit of a course in reference materials. Even though a large proportion of questions require the use of materials other than "R" books, a person who does not have a thorough knowledge of the latter will often waste time hunting for information which could be very quickly found in or through the ordinary reference books. A teacher of English litera-

⁴Hurt, Peyton. "Staff Specialization: a Possible Substitute for Departmentalization." *A.L.A. Bulletin*, 29:417-21, July 1935.

⁵Wyer, James I. *Reference Work* (Chicago, A.L.A., 1930), p. 233-39.

ture, for example, told a group of librarians how he located a lecture of John Manly's on the English medieval miracle play by discovering first from *Who's Who in America*, 1930, what English societies he belonged to and then scanning their proceedings of several years. It was good technique—if it had been necessary! Any bright young reference assistant who had profited by a good course on reference books could have found the exact citation at once in the *Cambridge Bibliography of English Literature*.

It is regrettable that crowded library school schedules do not allow time for preparation for reference work beyond the study of books and some general instruction and practice in the methods of tracing through comparatively few questions. (Fortunately, much that is learned in other courses contributes toward preparation for reference work.) Nevertheless, even if there were more time for instruction in reference methods, a good deal would have to be left to be learned in the library. No two libraries are exactly alike, and it is only after he is thoroughly familiar with a library's peculiarities in collections, in arrangement and classification, in policies and practices of cataloging and indexing, that a reference librarian can be trusted to "get the most out of it."

In-Service Training

This familiarity with the library can be hastened for the new assistant if, in the first place, the existing staff's attitude is sympathetic and helpful rather than distant and suspicious. An English librarian has said: "Any senior who is not prepared to go to some considerable trouble to explain to a junior the reason which led him to take a certain line in attacking a particular problem is definitely out of place in his post."⁶ In the second place, mistakes and embarrassments will be fewer if the rules, routines and policies of the department are in black and white so that the newcomer may be able to study and absorb them when he is not distracted by either his own or his colleague's activities. More and more libraries are making staff manuals. A well-organized reference department usually has also its own routine sheets which are more detailed for its own work than its section in the library staff manual. These give not only specific directions and rules for various aspects of the work but also descriptions of the homemade reference tools, and notes on peculiarities of arrangement of materials.

No one can learn all there is to know about reference materials once and for all. Current events and new publications soon make a reference librarian's knowledge out of date unless he deliberately makes the effort to keep it up to the minute. Reading the daily newspapers, scanning periodicals, bibliographies and reviews, examining current accessions to the library are all essential parts of his duties, and reference department schedules should allow time for them. Scanning periodicals and bibliographies, for example, may be performed at the reference desk if there are slack times, when the attendant's chief task is supervision of the room. Where there is a great deal of new material coming into the

⁶Woodbine, Herbert. "Reference Libraries," *Library Association Record*, ser. 4, 4: 120, March 1937.

library, it may be necessary to divide the examination of it among the various members of the staff, a step toward specialization. Reference staff meetings held at regular intervals will provide for sharing of information about new materials as well as for exchange of ideas on the ways of solving knotty problems, either of reference questions or of matters of administration. Each member of the staff may be assigned one or more professional library periodicals from which to report and digest articles of special interest to reference librarians. If such assignments are rotated, everyone will become familiar with all the professional journals.

It is not enough for the members of a reference staff to keep themselves informed on what is going on in their own department. They must know enough about other departments and divisions to be able to decide when and how to call on them for help in behalf of a reader and also to give intelligent assistance in return.

Finally, the new assistant should lose no time in learning all he can about the community, for a good deal of the reference work of most libraries calls for information about the locality and a reference assistant can lose prestige quickly through lack not only of knowledge of the means of finding specific bits of local information but of the background against which the questions are projected. He must, as soon as possible, put himself on a common footing with those who seek his aid. Specifically, for example, in a public library he should get as much firsthand information as possible about the municipal departments, the schools, the newspaper press, the social, industrial and religious organizations, the historical and racial background of the people. In a college or school library it will be personal familiarity with the administration of the college or school, including departments of instruction, with the student organizations, activities and interests, the specialties of the individual members of the faculty, the school publications, and so on, which will provide the necessary knowledge of the immediate environment expected of the reference librarian. Such familiarity will contribute to the rapprochement which should exist between him and his clientele, actual and potential.

Schedules and Responsibilities

The organization of the work of a reference department then should further the efficiency of the department as a whole, making the most of and promoting the special abilities and interests of the individuals. The ideal schedule will make room for all aspects of reference work to be cared for; the required number of ~~assistants~~ to handle the questions at each hour of the day and also to keep up the work which must or would best be done "away from the desk." As one reference librarian has written, and many have thought if they haven't expressed it, "Not until we have the perfect working day will we have perfect reference librarians."⁷ The schedule will also conserve the health and mental acumen of

⁷Purdum, Helen L. "The Reference Librarian and Her Public," *Library Journal*, 61:631, Sept. 1, 1936.

the individual by avoidance of irregular meal times and excessively long hours at any one duty, whether it is answering questions or performing some one of the tasks that require professional knowledge but that become drudgery if carried on too long at a time. Alternation of these two types of work is a relief to most librarians.

Delegations of responsibilities for certain parts of the work, such as the care of the vertical file or the supervision of the shelving or of certain records, promote the efficiency both of the department and the individual. For each person to whom a responsibility of this kind is given an assistant or understudy should also be appointed in order to carry on in the absence of the person chiefly responsible and in order to develop versatility and knowledge of various parts of the work and collections of the department. The assistant who is responsible for the upkeep of the vertical file may serve as understudy for the one in charge of interlibrary loans, and the latter for the one in charge of schedules, and so on.

There must be a clear understanding of the circumstances under which a negative answer—"It cannot be found"—may be given. A good general rule is that such an answer may not be given except with the approval of the highest ranking member of the reference staff available. Allied to this is the need to impress upon some assistants that they should consult others if they are in doubt how to proceed or if they find that the methods they are using are leading nowhere.¹ The reference librarian of the Birmingham, England, Public Library has described this particular administrative problem in the following words:

I am sometimes tempted to think that the biggest problem confronting any reference librarian in the large library is the enthusiastic, keen assistant. To get such an assistant to develop a sense of proportion, a sense of the value of time to an inquirer, a sense of the proper amount of time any inquiry is entitled to occupy is a real proposition.

Every reference assistant should try to judge quickly whether he can deal with a question and how much time his attempt should take. If he has any doubt about the method by which to attack the problem, he should at once consult the senior in charge. In no case should he hang on to an inquiry trying possibilities. An inquiry needing this is a job for the senior. Every reference assistant needs to remember that there are no geniuses in reference work, but that experience does, time after time, show the way to the solution of a problem. The assistant of most value behind the counter in any large library is the person who handles quickly the problem he understands, passes on just as quickly the problem he has doubts about, sees that he learns in due course how that problem was attacked and solved, and then adds details and method to his store of knowledge. If everything is not absolutely clear to him he should take the first opportunity to discuss the whole procedure with the senior in charge.⁸

Ambitious reference assistants who follow the advice of this experienced reference librarian will not only render more satisfactory service to patrons of the library but will do themselves more good than if they work overzealously without help or guidance on questions too difficult for their inexperience.

⁸Woodbine, Herbert. "Reference Libraries," *Library Association Record*, ser. 4, 4: 120, March 1937.

Essential Records

Since for some reference questions it is necessary to request the inquirer to call back at some future time, and since others are telephoned in advance of a prospective visit to the library, it is necessary to have reports of progress and results of searches readily accessible when the inquirer comes in. For that reason the name and address of the inquirer and the time at which he is expected to call must be secured and recorded as well as all the information about the question that he was able to give. The initials or some other symbol of the person who took the question in the first place should be added at once, and then, if various people work on it, they should all record and initial their procedures and findings. Some reference departments have a printed form for this record, which ensures all the necessary information being obtained and recorded. No reference assistant should feel offended if a succeeding worker goes over the same ground he has covered because it is always possible that a person with a different point of view will see significance in some bit of information which another ignored as not pertinent.

In some libraries either a list or a tally of all questions is kept; in others only the difficult or unanswered questions are listed. There is considerable difference of opinion as to the need for the former. It depends largely upon the size and organization of the library and the number of people answering reference questions. The usefulness of such lists is discussed further in the following chapter and in chapter 28. Other possible records include charges for books temporarily removed from the reference room, schedules and time cards of staff members, correspondence and interlibrary loans files, lists or statistics of bibliographies compiled—in short, whatever is needed to keep track of the work done and to provide data for annual reports.

Coordination of the Reference Services of a Library

The Library without a Separate Reference Department

A separate reference department is not a prerequisite to reference service. Many small libraries and some large ones of all types are not organized into departments. Nevertheless, reference questions are answered in them—and effectively. The essential thing is that there shall be someone on the staff—the chief librarian, a cataloger, a general assistant—who has the qualifications of a good reference librarian and the time to handle the questions which come. When the questions become so numerous that either they cannot be satisfactorily handled or they interfere with other work, it is a sign (but not the only one) that the library needs a reference librarian to devote his whole time to reference work. In a library without a reference librarian there is perhaps more danger that preparation for answering questions—the selection and organizing of reference materials—will be neglected rather than actual work on reference questions.

If a record of unanswered questions is kept, the librarian can go over them with the persons who tried to answer them to see whether the failures were due to lack of the proper materials or the lack of ability or willingness on the part of the staff. If it is the former, the selector of books and periodicals for the library must be made more conscious of reference needs, and in what better way could this be accomplished than by putting that person in charge of reference work for a while? If it is lack of ability, steps may be taken by the librarian, just as they are in a reference department, first, to make sure that a negative or unsatisfactory answer shall not be given by the less competent person on duty without the approval of his superior and, second, to train the less competent by showing how the question could have been answered and by requiring some study of reference materials before allowing assistants to handle the public's questions. If it is a lack of appreciation of the importance of reference service, it would seem that one or more staff meetings should be held at which the relation of efficient reference service to the vitality of the library is driven home. If it is really lack of time and there is absolutely no prospect of an increase in staff, a revision of staff activities and schedules may provide the necessary relief from other duties to allow time for reference work.

The responsibilities for different parts of what would be the work of a reference department, if there were one, can be allotted among the members of an undepartmentalized staff of a library in the same way as for a reference department. The chief responsibility for reference work in a library with a very small

staff, if not taken by the head librarian, should be given to an assistant who has had professional training. So far as knowledge of books and reference methods is concerned the cataloger is likely to be the best equipped person on the staff, and he will find that the contact with readers, which reference work will bring, is likely to be a benefit, offsetting the time taken from cataloging duties. If, as some people believe, work in a cataloging department is the best preparation for reference work, the converse is equally true. The cataloger who likes to have a part in personal service will welcome the opportunity, and the one who does not certainly needs to learn the reader's point of view.

In some libraries, especially small college libraries, reference questions are handled at the circulation or loan desk, which is a natural place for readers to ask their questions. The objections to this are that it is often hard for the professional attendant to take sufficient time to talk with the inquirer and to make thorough searches, and that the circulation staff usually includes student or other untrained assistants who are likely to undertake to answer questions when they are incapable of doing so. The result is that the readers get an erroneous idea of the resources of the library and the ability of librarians.

In the library which has only one person in charge of reference work that person cannot be on duty all the hours that the library is open. It is necessary, therefore, to take special pains to see that everyone who is likely to make note of questions to be looked up will invariably record not only the question correctly but the name, address and telephone number of the inquirer. Pages and clerical assistants, not to mention janitors and cleaning-women, are likely to be approached by readers for information. Naturally they are not and usually cannot be trained to conduct a reference interview, but they can be instructed to see that the inquirer fills out a simple blank, so that the reference librarian may be able to get in touch with him and not be obliged to work in the dark as to what is really wanted.

The Library with Subject and Form Divisions and Extension Branches

At opposite poles, so far as the organization of reference service is concerned, are the library with the small undepartmentalized staff and the library with many departments, branches or divisions. Fundamentally, however, one type of problem in administering the reference work of both is the same, namely, the coordination of all the reference services rendered. In the library with functional departments only, it is fairly simple to isolate the reference functions in one department of comparatively few members so that one chief reference librarian can have close supervision over all the reference work. When there are half a dozen subject divisions, however, and perhaps a dozen branches, in all of which reference service is given, there is an opportunity for very uneven development of reference resources and quality of reference work. Unfortunately, there is also the possibility of an unhealthy rivalry unless there is some over-all control. The chief administrator of the library is, of course, in the last analysis the one

who exercises this control, but just as he may delegate part of his administrative work to a head cataloger or an order librarian or a supervisor of children's work, so he may delegate part of it in another line to a supervisor of reference work, one of whose principal duties is to act as liaison officer not only between a central reference department and the branch reference departments but among branch reference departments.

The Functions of a Supervisor of Reference

The office of such a supervisor acts as a clearinghouse of materials and information, of questions and problems. If, for example, the reference librarian of a branch makes known to the supervisor a need of an expensive reference set, the latter is in a position to know whether that set can be shifted from another branch, perhaps to the advantage of both. He can work out a scheme of alternations among branches for annual publications of which most branches do not need the latest edition every year. He can circulate information about new reference materials and centralize the acquisition of free reference materials. He can institute and execute cooperative plans of specialization among the branch reference collections. Questions that cannot be answered in the branches can be referred to the reference supervisor's office for more immediate attention than the central reference department can usually give. If the answer would require transfer of materials by interloan to the branch and the inquirer is unwilling to wait, the supervisor's office can find out and report the nearest other branch in which the materials are available. By reason of his acquaintance with the reference work in all branches he can put in touch with one another librarians with similar problems of reference administration for interchange of experiences, and he can arrange for conferences of representatives from all branches for discussion of reference problems and materials. He can also arrange for branch reference librarians to work in the central reference department for inspiration and training. These are some of the ways in which central supervision of reference work can directly benefit the librarians and the users of the branches. A reference supervisor, on the other hand, is an aid to the central administration of a library, both by effecting economies in the acquisition of reference materials and by collecting and organizing information on the resources and services of all the outlying parts of the library system.

The foregoing is a sketch of the work of a supervisor of branch reference work in a public library. Much the same kind of supervision could be applied to the departmental libraries of a university, although that setup more closely resembles the reference work distributed through the subject divisions of a public library. Here, the functions of a person or department having an over-all view of the reference work of the library have to do more with the handling of reference questions than with the organization of materials. The problem is to make sure that the inquirer is neither bandied about between departments or divisions nor held in one to his loss. The staff members of any departmental library of a university or a subject division of a public library naturally look at any question

proposed to them from the point of view of their own subject and sometimes fail to realize that it could be better answered in some other subject department or by means of general reference aids. One of the important qualifications of satisfactory reference work, as shown in the section on handling reference questions, is the ability to look at a question from various angles. Some way has to be found to broaden the outlook of most subject specialists so that if, for example, the staff of a music division can find nothing on Josepha Beck in their special reference works, they will not spend a long time searching through the rest of their collection before making the identification of her as a German singer of the eighteenth century through the use of Larousse in the general reference collection.¹

The inclusion, on the staff of a subject division, of assistants who have had general courses on reference books and experience in a general reference room, and the occasional interchange of assistants are means of broadening the composite background of the staff. Whether the assistant from one department or division should take a question into another to work on himself or turn the question over to the staff of that division depends partly upon the arrangement of the building and the size of the staff. If it is not practicable for the person who begins work on the question to leave his department, he certainly is entitled and should be interested to learn how a difficult question was answered in another department and thereby increase his knowledge of what lies outside his own bailiwick.

There is perhaps more need to keep lists of all reference questions asked in a library where service is scattered through several divisions and departments than in a library where all reference work is centralized. These lists may be examined by one person or by department heads in conference to see whether questions are being handled in the right divisions and are being referred as they should be. They may also be circulated among the divisions to give them an appreciation of the work being done in other departments and an idea of what questions would be better referred to them.

Brief descriptions of the general contents, special collections, and indexes of the various divisions kept on file in all of them, indexed by subject and supplemented by news of important acquisitions, are a unifying device. Another is a tabulation and analysis of certain subjects, showing which divisions contain their various aspects, for example, showing that although the main collection of books on Indians is in the history division, scientific books on their racial characteristics and legends are in the sociology division, books on their arts and music in the art division, books on their religion and mythology in the religion and philosophy division, books on Indian schools in the education division, and novels and poems about Indians in the literature division.

Although this coordination of scattered reference services can be accomplished by the voluntary associated efforts of all on the staff who are engaged in

¹This example is taken from Cabbage, Ruth J. "Some Sources of Musical Information outside the Field of Music," M.S. essay (N. Y., Columbia Univ., 1939, MS), p. 12-13.

reference work,² it would seem to be more effectively achieved under the authority of one person placed in charge of all reference work in the library. Provision would thus be made definitely for the drafting and execution of plans, which otherwise have to await either the interest and leisure of someone who can and will take time from his individual pressing duties or the lengthy process of committee deliberation.

The Relations of the Reference Department with Other Functional Departments

The associations of the reference department with other functional departments of the library are frequent and highly important in the interests of good reference service to the public. As has been emphasized more than once in this book, good reference work depends very largely upon good cataloging, which the reference librarian interprets as a record of the library's holdings so complete and accurate that they can be found. The reference librarians, as users and assistants to users of the catalog, are in a position to notice the errors, inconsistencies and deficiencies which occur in even the most nearly perfect of catalogs. These they should always report to the cataloging department through proper channels but never attempt themselves to rectify without permission from the cataloging department. They have no right to demand changes, since they are not in possession of all the facts in regard to the work involved, but they should feel free to suggest them and may well expect to be consulted if any wholesale change of policy affecting the information to be obtained from the catalog is contemplated, such as the elimination of various kinds of added entries. By keeping track of the time that the users of a more author catalog spend in verifying titles through printed bibliographies, the reference librarian may be able to demonstrate that time saved in cataloging is lost in reference work. As was shown in chapter 5, if a request for a work includes a misspelled author's name it may take hours of search before the book can be found, unless it is possible to find it at once under title or subject in a dictionary catalog.³

The urgent need at times in the reference department for new materials may create friction unless there is a clear understanding between the cataloging and reference departments concerning use of uncataloged material. No reference librarian should ever help himself, but, on the other hand, the cataloging department should provide some way for material to be used, when necessary, before the cataloging process is finished. The use of recently acquired materials may even precede the beginning of their cataloging. This takes the reference librarian into the domain of the order department, with which similar arrangements for consulting new materials should be made.

²The fullest discussion of such coordination of reference services in a library with subject division is in Mary N. Barton's paper, "Administrative Problems in Reference Work," delivered at the Chicago Library Institute in 1942. In Pierce Butler, ed. *The Reference Function of the Library* (Chicago, Univ. of Chicago Pr., c1943), p. 218-48.

³Prevost, Louise. "Simplification and the Code," *Library Journal*, 67:154, Feb. 15, 1942.

Relations with the order department may be kept smooth if there is agreement as to what may and should be ordered "rush" and if the reference department will follow what it preaches to other people in regard to giving all possible information about a wanted item, including a reference to the place in which it was observed. The two departments may be mutually helpful through interchange of notes and dealers' catalogs of books, new and old.

The reference department has much in common with the circulation department since both deal directly with the public. If there are two separate departments it is necessary that the lines between them be clearly drawn so that the circulation department will be sure to refer to the reference department the readers with reference questions and so that, since many reference questions lead to home use of books, the reference department will not be entangling circulation records. It should go without saying that the reference department has the authority over the circulation of reference books. Whether the main record is kept at the circulation or the reference desk does not matter so much as that both departments should have some record of the loans of reference books to readers and that there should be some system of clearing between the departments.

It may not be amiss here to offer a word of explanation for the seeming "selfishness" and "snobbishness" of reference departments of libraries in which the policy is to centralize reference service. Readers do not distinguish between a reference librarian and a cataloger or any other librarian who appears in a public part of the library. Often the person addressed by them, though not a reference assistant, likes to do reference work and grasps at the opportunity to vary his work, and he does not understand why he should not. There are at least two reasons. One is that he is not so well acquainted with the reference resources as the reference department, whose members know not only the books and the library catalog but also the serial publications and their indexes, the pamphlets and clippings in the vertical files, and the records of answered reference questions at the reference desk, which may perhaps furnish a better answer than the book which the cataloger finds through the catalog. Another reason is that the reference department may be keeping statistics of the reference questions asked in the library, not to show how much work it is doing but how many people are given reference service, and the circulation assistant who answers a reference question will probably fail to record it. The writer of this book, though delighting to do reference work and considering herself capable of answering most of the questions which readers address to her at the public catalog of any library, always scrupulously refers the inquirer to the reference department if there is one. Members of other departments of the library staff should do the same, unless it is the rule of that library that questions are to be answered by any librarian who is approached.

Administration as Affected by Clientele

Restrictions on People To Be Served

It would surprise most readers to know that a distinguished author of wide research experience, in comparing the satisfactory use of libraries the world over, reckons the reading public as one of the four factors to be considered, on a par with the contents, the personnel and service, and the plant and facilities of the library. His conclusions are not flattering to North American readers. Having expressed satisfaction with the behavior of European and South American readers, and with the richness of content, the almost unsurpassable service and the magnificent buildings of the libraries of the United States, he opines that the only drawback to the latter is the reading public.¹ Whether or not American librarians agree with his condemnation, they can accept the premise that the behavior of the people does affect the reference use of the library. An unruly and noisy public not only disturbs readers but interferes with the reference interviews and distracts the attention of the reference assistants trying to concentrate on a difficult question. The answering of "trivial" questions or those of people who have no right to the services of a library may prevent or postpone the answering of important questions of the persons whom the library was established to serve.

A reader who is accustomed to unquestioning reference service from his public library may be surprised and annoyed when the reference assistant in the university library in his city or the public library of a neighboring city does not immediately help him to find what he wants. Nevertheless, in order to provide adequately for the needs of their own clientele some libraries are obliged to refuse service to "outsiders." Each library has not only the right but in some cases the obligation to define the groups of people whose reference questions it will or will not answer, according to the circumstances of the origin of its funds, the size of its community, and the adequacy of its staff and collections to the demands made upon them. The library of an endowed university in a large city that has a good public library naturally does not recognize the same obligation to answer the questions of people not connected with the university that a large state-supported university library accepts without question toward the citizens of its small community with inadequate public library service. The

¹Means, Philip Ainsworth, "Some Research Experiences in Libraries Here and in Other Countries." In *Proceedings of the First Convention of the Inter-American Bibliographical and Library Association, Washington, D. C., 1938* (N. Y., Wilson, 1938), p. 205-07.

reference staff of a well-equipped and well-organized suburban public library may welcome the questions of the few college students who ask for assistance, but the reference librarians of a public library in a large city may have all they can do to take care of the questions of the general public and cannot afford the time or the materials to help hordes of college students. The question then as to who may receive reference assistance is a matter for each library to decide for itself, not arbitrarily but according to its sense of obligation and the affluence of its resources and personnel.

Whenever it is necessary to refuse reference services, it should be done courteously, with an explanation of the reasons and suggestions as to more suitable libraries to which the inquirer may go. A printed explanation of the rules, which may be handed or pointed out to the inquirer, will help to make the refusal more palatable. Like the "negative answers" which are due to inability to find what is wanted, any refusal to give service should be handled by the ranking assistant at the reference desk.

In libraries, where reference services are restricted, exceptions to the rules are usually based on reciprocity between libraries and the existence of library specialties. The administrations of most libraries recognize the obligation to put their special collections, unless of a very rare nature, at the disposal of serious inquirers with credentials. Aid to real scholarship is not altogether altruistic, as the library may expect to benefit from its products.

Correspondence

Similar considerations govern the formulation of policies as to correspondence. If individuals in cities with good libraries who write elsewhere for commonplace information are referred back to the library in their own city, which presumably owes them service, they may thereby learn of the existence of a convenient reference service hitherto unknown to them. On the other hand, an individual who indicates that his library is unable to help him and has suggested his writing to the library addressed, because it possesses peculiar resources likely to be of aid in his problem, probably is a person who should be helped. Most reference librarians, however, would prefer that the request be forwarded by the reference librarian in the library of the inquirer's community, who would state what he had been able to learn from his reference interview and what he had himself consulted in the attempt to solve the question. The charging of a fee for both personal reference work and correspondence has been adopted by some libraries as a help in preventing an excess of unreasonable demands on the part of those not strictly eligible to service.

Telephone Reference Service

Among those who are entitled to reference service in a library questions of precedence arise, especially when requests for assistance come in simultaneously or when one inquirer interrupts another, as in the case of telephone calls. In some large city libraries the telephone reference service is a great problem and desper-

ate reference librarians complain of it as an interference with service to the readers who come to the library. On the other hand, there is at least one public library in a smaller city where readers are encouraged to telephone their inquiries rather than bring them in person, in order to relieve congestion in a small building. It has been noted that the number of telephone calls increases in a public library as it increases its service to business.²

One way of solving the problem as to whether the inquirer at the desk or the one at the far end of a telephone connection is to be served first is to separate the telephone reference desk from the main desk.³ This is a solution for the library in which the reference department answers tens of thousands of telephone questions a year and in which assistants have to be on duty all the time just for telephone calls. In libraries where there are relatively few telephone calls it is customary, if the telephone rings when all assistants are busy with inquirers, for one of them to excuse himself long enough to answer the telephone. He takes down the question, the name and telephone number of the inquirer, sets a time for calling back or assures the inquirer that the question will be attended to as soon as possible, and then returns to the interrupted question, leaving the telephone question to be worked on as soon as he is free.

In libraries in which reference service is given in more than one department the switchboard operator should be as well informed about the library and as judicious as an information desk assistant in order to route the calls to the right departments. Even then, they may have to be transferred, though this may well be a case of referring the question rather than the questioner if the request is well handled by the first person receiving it. The only persons allowed to take telephoned reference questions should be those who are well adapted to telephone conversations and skilled in the art of conducting a reference interview in order to be able to get a clear and complete statement of the problem in a minimum of time. Pads and pencils must always be in readiness. The former may be a pad of forms especially prepared for telephone questions.⁴ The essential factors in efficient telephone reference service, according to the reference librarian of the Cleveland Public Library, are "a good quick reference collection, the best telephone equipment and a well trained staff."⁵

Regulations and instructions in the use of the telephone usually form a part of a library's staff manual, but each department may supplement these with more specific directions for its own staff. Most reference departments restrict the amount and kinds of information that they will give over the telephone. It seems unfair to those who come to the library, for instance, if the reference staff spends

²Manley, Marian. *Public Library Service to Business* (Newark, N. J., The Public Library, 1942), p. 10.

³Gifford, Florence M. "Telephone Service Desk," *Wilson Library Bulletin*, 15:826-27, June 1941.

⁴For example see Macmillan, Jean Ross. "Calling Reference," *Ontario Library Review*, 26:48-50, February 1942. The reprint of this article in *Library Journal*, May 15, 1942, lacks the sample form.

⁵Gifford, Florence M. "Telephone Reference Service," *Wilson Library Bulletin*, 17:630-32, April 1943.

a long time reading aloud lengthy passages just to suit the ease and convenience of someone elsewhere. It is difficult also to transmit accurately some kinds of data orally. The use that is to be made of the information has a bearing on the decision as to whether to give it over the telephone or simply notify the inquirer that it is ready for him to use at the library. A reference department would generally refuse to read a page from the *Statistical Abstract* over the telephone to a high school or college student for a paper he was writing but would accede to the request of an executive who had some urgent need of the figures in his business. Many reference departments will not knowingly answer questions for contestants or bettors either over the telephone or in person. In some public libraries, however, assistance is given freely to people who are working on a contest for a prize on the grounds that their claims on the library to help them better their economic status are just as good as those of any wage earner. This argument is usually put forth in the smaller, more leisurely libraries where helping people to solve puzzles and answer quiz contests does not interfere with other work nor put undue strain on reference materials.

Rules and Regulations

In order to prevent favoritism, or charges of it, it is advisable to make and enforce rules and regulations concerning questions which may and may not be handled by the reference department and concerning the relations between readers, the reference librarians and the books. The most important prerequisite for making just and practicable rules for the governing of relations with and between the readers is to remember that the primary purpose of the reference department is to help the public. Even when the department appears to be hindering readers, an analysis of the reasons lying back of its rules will generally, and should always, show that they are for the benefit of the public as a whole even though some individual reader is hindered in his use of the books; an example is the placing of certain books on closed shelves to insure their being in the room when wanted. In fact, the maintenance of a collection of reference books at all may be displeasing to the individual reader who would like to take home the volume of the *Encyclopaedia Britannica* that has a long article in it on some subject he is studying.

Rules should be made for the individual library by those who know it best. There can be no model code of rules for a reference room that is applicable to all libraries. The fact that in one library debaters' handbooks or quotation books or guidebooks are on closed shelves is no sign that they should be in another library. The best thing to do is to put them on open shelves for a while and see what happens. If they tend to disappear or to be misplaced intentionally, this may be taken as a good reason for placing them out of the reach of the public. A rule forbidding something should not be made until all other possible means of preventing harm have been considered, if not tried. For example, instead of forbidding people to trace maps or pictures in reference books, the reference department may be prepared to furnish some transparent protective substance

to place between the book and the tracing sheet. Instead of forbidding all conversation centering around some reference book the reference department may furnish a room or nook where two or three can converse without disturbing others.

Printed or typed rules may allay suspicion on the part of an offender that a rule has just been made up for his special annoyance. It is a generally accepted psychological principle that rules should be phrased in positive rather than negative terms so far as possible. Unless the reason for the rule is self-evident to the reader or the inexperienced assistant, it should be stated explicitly. Most people are much more willing to submit to a rule that is reasonable than to one that seems arbitrary. Some of the regulations of a reference room are for the personal comfort of the readers, such as those for the maintenance of sufficient quiet for concentration and for protection against encroachment on limited seat and table space due to careless scattering of personal possessions. Others are for the preservation of reference materials and for the assurance of their being on hand when wanted.

Reference librarians differ widely on the question of circulation of reference books. Some object to letting any reference book be removed from the building during the hours that it is open to the public on the grounds that some reader may make a trip to the library in the confident expectation that reference books will be available to them.⁶ To this the reply might be made that reference books sometimes have to be sent out to be rebound and sometimes are stolen so that disappointments are bound to occur now and then. However, this unavoidable absence is easier to explain than a relaxation of rules for the benefit of someone other than the aggrieved person. Some reference books, very difficult or costly to replace, it would be unwise to lend even when the library is closed. Readers often make demands which to them seem reasonable but to the reference librarian unreasonable because to allow a reference book to go out "just overnight" may result in serious loss, inconvenience, and expense. The reference librarian knows that if one volume of a set is lost it may be necessary to pay tens or even hundreds of dollars for a whole new set. The requirement that the cost of replacement be deposited before an expensive reference book can be withdrawn overnight or over a holiday may lessen requests. There remain, however, the inexpensive reference books which are in such frequent demand that the reference department does not want to run the risk of the inconvenience to many readers of a tardy return of a loan. A solution of this problem is duplication of copies for circulation.

It is perhaps easiest to make and enforce the rule that no reference books shall at any time be circulated. It is hard to reconcile this, however, with the consciousness that some reference books are used so infrequently that there is really no reason why they should not leave the premises for a few hours at a time, especially if they may be subject to recall on short notice. Experience only will show the reference librarian in a given library how closely the circulation

⁶Wyer, James I. *Reference Work* (Chicago, A.L.A., 1930), p. 273-74.

of reference books should be restricted and how rigidly the rules should be kept.

Whatever rules are adopted, a way should be found of enforcing them without antagonizing the reader. A courteous explanation of the reasons for the restriction will satisfy many people. Often a substitute for a reference book that is wanted may be found. An older edition retired to the stacks may have the identical article which has not been changed in the revised edition, or an entirely different book may be even more satisfactory, since the reader may have simply chosen the reference book because he saw it first. The offer of the use of a typewriter or of a room in which to use a typewriter for the copying of long passages may be more satisfactory to the reader than carrying a heavy book home. Sympathy and the spirit of helpfulness go a long way toward softening a disagreeable prohibition.

✓ *Restrictions on Amount and Kinds of Service*

Is there any limit to the amount and kinds of service which an individual can claim from a reference department? This question has to be answered by the administration of each library in the light of the purpose of its establishment and the experience of its staff. Generally speaking, the smaller and less accustomed or obligated to self-help the clientele is, the more time is devoted by the reference department to the needs of the individual. The reference department of a special library and the librarians of a public library in a small city usually set almost no limits to the amount of work they will put into solving a hard reference question for a serious purpose, and the former copies, translates and abstracts materials also. The reference departments of university, college and school libraries not only are unable to spare the time for extensive searches indiscriminately but consider it part of their objectives to foster self-dependence on the part of students and faculty. Therefore, instead of undertaking long searches for everyone who asks for them, they guide and encourage the inquirer to conduct his own search, making clear that they are ready to advise further and to explain the intricacies of the content and arrangement of books if the reader is unable to proceed. Questions which come from the administration of the institution, however, are treated in the same way as questions from the executives of a business firm in a special library. The president or the dean of the graduate school in a university is not "guided" in the location of statistics or verification of a quotation! The information is *found* by the reference department though it entails apportioning books to different members of the department to *read through!*

In all libraries there are patrons who abuse their privileges and demand more than their share of attention. If possible, they should be prevented, firmly but tactfully, by the reference department from usurping time that should be given to other people. It may, however, be found necessary to have rules made or authorized by the administration that will support the reference department in its refusal to do such tasks as writing papers for clubwomen or students, making out reading lists for college instructors, translating articles for graduate students, and so on. If rules of this kind proceed from a higher authority than

the head of the reference department, the reader is less likely to think that the reference staff is trying to avoid exertion. "We are sorry but we are not permitted."

Discipline

Disciplining a large reference room is the least pleasant part of the work of a reference staff that has to deal especially with young people. Firmness from the start of each school year is required to establish a habit and expectancy of quiet. So far as possible the librarians should get the idea across that it is not they but other readers who are disturbed by conversation, but even this may fail to influence those who are either forced to spend their time in the library or who come there for social contacts. The difficulties of discipline in a room that is larger than necessary for reference purposes are an argument against trying in a college or university library to combine in one a reference room and a general reading room where students may bring their own books or books reserved for classes to study.⁷ For the same reason better reference work for both groups can be done in a public library if adults and young people are served in separate rooms.

⁷Yenawine, Wayne Stewart. "Wanted: a Functional Reference Room," *Library Journal*, 62: 237-39, March 15, 1937.

VI

THE LESS COMMON FUNCTIONS OF A REFERENCE LIBRARIAN

(1) *Advising Readers*

Relation between Reference and Readers Advisory Services

Answering reference questions, selecting and organizing the materials for that purpose, supervising the reference room and generally administering the activities connected with these services and processes are functions common to all reference departments of whatever type or size of library. To these some reference departments have added other activities such as advising readers, teaching them how to use the library, administering interlibrary loans, compiling bibliographies and abstracts, and preparing exhibits, articles and speeches for publicity.

Of these added functions, advising readers, in the common sense if not the technical application of the phrase, is the oldest and is still carried on in reference departments as well as in other departments in a great majority of libraries. Where there is no readers adviser or adult education department the reference librarian is likely to be quite unconscious of the difference between gathering some books and articles on orchestral music on which a reader wants information and advising him on what to read in order to develop his appreciation of orchestral music. Readers advisers appear to be equally hazy on the distinction between the two kinds of services, since they include in accounts of their work such diverse types of examples as helping a research worker to find biographical data or a lecturer to secure a bibliography on dictatorship on the one hand, and on the other, recommending *the* book for a young woman who had been advised to read "a book on psychology" to overcome her difficulties as an "introvert."

Anyone trying to plot a line between reference and readers advisory services from reports and task lists of the two departments in various libraries would find he was producing something like the old zigzag rail fences. Of the libraries which have both departments, some put the information desk in charge of the reference department and others, of the readers adviser. In some the reference librarian helps study clubs plan their programs and provides bibliographies for them, in others the readers adviser does this.

Some readers advisers claim such "bibliographical questions" as the "date of the last revision of Fowler's *Modern English Usage*" as falling in their province, but this is one of those questions which a reference librarian would consider a "routine reference question." Surely it does not take any very careful diagnosis of the inquirer's personality to furnish him with a simple and uncontroversial fact of this kind! The distinction between home and library use of the books recommended cannot be made a criterion, for reference work often

involves circulating books which the reader may take home. Individual personal attention to the reader is not the distinguishing mark of the readers adviser alone, for reference departments were established precisely to provide this very thing, and a reference librarian who does not try to judge his client's capacities and needs when he asks a question that can be answered in more than one way is not worthy of the name.

Probably one of the reasons that there is so much confusion in some librarians' minds as to the proper distinction between these two kinds of library service, both of which require interest in people combined with bibliographical knowledge, is that the difference lies less in the librarian and the question than in the motives of the inquirer, which are not always obvious to the librarian or even to the reader himself. If the inquirer's prime interest is in producing a change in himself, or, for cases presented at secondhand, in some person in whom he is interested, through self-education by means of books, he should be introduced to the readers adviser. If, on the other hand, his main interest is in the subject, whether from mental curiosity or from an intention to make some direct, practical use of the information he hopes to gain, he should be referred to the reference department or a subject specialist. For example, if a man says that he wants to read some books about Mexico in order to be a better "neighbor," it would be the work of a readers adviser to find out what sort of writing he likes, what he already knows and has read about the country, what his special interests are, and so on; but if he is going there and wants to find out some facts about the climate, living conditions, traveling expenses, and so forth, a reference librarian should be able to give him authoritative information without investigating his reading interests.

The reference functions of a librarian are informational and to some extent educational. The readers advisory functions are educational and to some extent remedial. There is consequently an overlapping of the two services. Whatever distinctions may be made between the two departments in some libraries, in others, large and small, the two services are carried on either by all the professional members of the whole staff who have contacts with readers or by the reference department. Even though it is the policy of the library that all requests for guidance in reading should be referred to a readers adviser, it is important that the reference librarian should know something of the methods used in handling such questions because an understanding of the objectives and problems of another department's work is the best preventive of friction between two departments whose functions are closely allied.

Publications on Advising Readers

The publications of the American Association for Adult Education and the Adult Education Board of the American Library Association include small books on the subject. The former's study of the role of the library in adult education¹ has

¹Johnson, Alvin. "The Readers' Adviser." In his *The Public Library—a People's University* (N. Y., American Assoc. of Adult Education, 1938), p. 36-46.

a chapter on the readers adviser, which makes a good "first reading" because it sets forth the need for such service and the requirements for rendering it. Different aspects of the work are introduced and accompanied by well-chosen bibliographies in the American Library Association's *Helping the Reader toward Self-Education* by three specialists in the field.² It will be seen from these books that the readers adviser, when he sticks to his last, helps the general reader who wants self-improvement of some kind and that to do this efficiently he must have time to make more of a diagnosis than can be done in the rush hours of a reference department. Whether a reference department with a properly qualified staff can handle this special kind of aid to readers depends upon the organization of the department—its size, clerical assistance and efficiency of administration. In the smaller, more leisurely libraries the reference librarian can and does do it

Advice on Reference Books

Reference librarians should be better qualified than anyone else on the staff to advise readers on the purchase of reference books and on the making of bibliographies, but, of course, this takes time, since the environment, finances, purposes and needs of the inquirer have to be taken into consideration. If the library is so poorly organized that the reference librarian cannot spare the time for this, he should be ready to share his expert knowledge with the readers adviser, for the service of the reader is their common aim.

Advice to Groups

Groups of readers who are seeking self-improvement and self-expression—study clubs, debating teams, dramatic organizations and so on—have been coming to reference departments for aid for a great many years. In some libraries service to these groups has been taken over by the readers adviser, as it is clearly a part of adult education. Where there is no readers adviser, and even in some libraries having a readers adviser, the giving of this service remains a duty of the reference department. The amount of this work to be done varies greatly from state to state and library to library. In some places it has practically died out while in others it is still "going strong." There are many aids in the shape of debaters' handbooks and manuals of club programs, but ready-made patterns may not fit the group which requires a custom-made program or help in making one. Here is a challenge to be met successfully only if the reference librarian can know the interests and abilities of the people concerned.

²Chancellor, John, Tompkins, Miriam D., and Medway, Hazel I. *Helping the Reader toward Self-Education* (Chicago, A.L.A., 1938).

Teaching the Use of Books and Libraries

Individual and Group Instruction

Another educational phase of reference work is instruction in the use of books and libraries. This falls naturally to the reference department rather than any other department of a library because its special attitude toward and knowledge of books are practical. Moreover, the reference librarian has a peculiar interest in undertaking this instruction because he knows that the more people he can induce and prepare to help themselves the more time he will have to help those who have reference problems too hard to solve by themselves.

The teaching may be individual, as when the reference librarian shows an inquirer how to use the *Readers' Guide* or the card catalog, take down references and find them, look for bibliographies at the ends of encyclopedia articles, follow cross references, make bibliographies, take notes and so forth. This sort of informal and incidental teaching goes on all the time, especially in libraries frequented by students. When there are many such opportunities, the reference librarian begins to think of group instruction, as a still further economy of his time. If in some way twenty people can be taught how to use the catalog or the periodical indexes in the same minutes that it takes to teach one person, there should be left so much more time in the day for the more difficult and individual problems.

The trouble is that group instruction is seldom quite so effective as individual, because the incentive to learn is not so strong as when the student is faced with the necessity for securing information for a class report or material for a term paper. To provide an incentive for learning the use of the library in schools and colleges, its teaching is sometimes introduced into another academic course instead of being offered as a separate course in "bibliography." One disadvantage of tying up with another course, however, is that the bibliographical materials and examples of questions appropriate for that course may not be suitable for other courses for which the student also needs to use the library. Literature or one of the social sciences is usually the course in which bibliographical instruction is given. Although they have much in common in the use of general indexes and materials, they differ sharply, one from the other, in special materials and in topical headings. They also differ from such subjects as chemistry and fine arts. If, however, library instruction were introduced into each course there would be too much repetition of instruction on general reference books, as the students' guides to the literature on various subjects clearly show.

There are advantages, therefore, in separate bibliographical courses given by reference librarians whose experience with the questions brought them by students is a guide to what the latter need to be taught and to motives that may be supplied.

Another objection to formal class instruction by reference librarians is that many librarians have had no training in teaching methods. The reference librarian who, though he has not had a course in teaching the use of books and libraries, plans to start teaching should study Ingles and McCague's book on the subject.¹ Although this was written especially for the school librarian, the reference librarian of the college or university will find much in it that is adaptable to college students. Moreover, its annotated bibliographies include books and articles on college courses.²

One thing to guard against is the making of a course of this kind a repetition of the library school course in reference. Teaching the student how to use the library for his own purposes is not the same as teaching a college graduate how to do reference work.³ Just as a reference collection should be built up to fit the needs of a particular library, so a course in the use of the library should be constructed to fit the needs of the students of the particular type of school or college. It is seldom advisable to follow literally textbooks or syllabi of similar courses in other institutions. In using them as suggestions the best instructors make their own adaptations. If the problem method is used the questions should not be copied from some other course because they may not be suitable. Moreover, there is no better way for a teacher of reference materials to become as thoroughly familiar with them as he should be for confidence in teaching than to make out his own questions. Anyone who has had reference experience—and few others should teach the course—can make up questions which will illustrate his points and at the same time will closely resemble questions that are frequently asked.

Although most courses in the use of libraries are for public school pupils and undergraduate college students, it is recognized that many graduate students are also in sore need of bibliographical instruction. Some of them have never had any and those who have may need further and more specialized information on the materials in their own fields and in bibliographical research

¹Ingles, May, and McCague, Anna. *Teaching the Use of Books and Libraries* (3d ed., N. Y., Wilson, 1940).

²Textbooks published too late for inclusion in *Teaching the Use of Books and Libraries* are:

Aldrich, Ella V. *Using Books and Libraries* (N. Y., Prentice-Hall, 1941). A simplified textbook for college Freshmen, omitting publishers, places and most dates of publication.

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³James, Alan E. "The Freshman and the Library," *Wilson Library Bulletin*, 15:403-07, January 1941.

methods. This more advanced and specialized instruction would seem to belong in a seminar of the subject and is usually given by the subject specialist, but occasionally a reference librarian has shown such mastery of bibliographical research that he is called in to assist with, if not to give all, the instruction on bibliographical methods.

One of the most embarrassing difficulties met in teaching the use of reference materials above the elementary grades is the variation in the previous experience and instruction of the pupils. The higher in the educational system the greater are the discrepancies. The college student comes from schools in various cities and the library school student from colleges in various parts of the country or world. The result is that in the same group will be found those who know nothing about catalogs and books, and others who are ready for instruction on a very advanced level. Pretests may be used to sort the students and give the teacher an idea of the point at which to begin instruction. Ingles and McCague include some sample tests at different levels with a list of sources of additional tests. Since it was published, a series of tests on the elementary, high school and college levels have been devised at the George Peabody College for Teachers.⁴

The librarian of the University of Michigan taught a course to Freshmen in the use of the library, from 1879 to 1905,⁵ and there is evidence that such courses had spread by the end of the nineteenth century.⁶ However, there are still colleges in which the only instruction given is in the form of a few lectures and conducted tours of the library. These may stimulate some interest but seldom create a lasting impression on the new student.

Visual Aids

Visual education has its place here. Motion pictures of library activities serve the same purposes as the conducted tour and consume less of the staff's time. Exhibits in which plans and diagrams show details in the arrangement of the library and explain the classification, cataloging and indexing of books have the advantage that the students can take as much time as they need to acquaint themselves with these features. Sources of illustrative materials which may be used either in the classroom or in exhibits are listed in Ingles and McCague.⁷ The film prepared by the University of Illinois Library School, listed therein, has been superseded by a new one entitled "Contact with Books," which is said to be well adapted to illustrate the use of any college or university library and may be borrowed through the University's Visual Aid Service.⁸ The film "Yours for the

⁴Shores, Louis, and Moore, J. E. *Peabody Library Information Test* (Minneapolis, Educational Test Bureau, c1940).

⁵Severance, Henry O. "Raymond C. Davis, 1836-1919," *College and Research Libraries*, 2:344-47, September 1941.

⁶"Conference of Librarians" [American Library Association], *Library Journal*, 22, no. 10:165-68, October 1897.

⁷Ingles and McCague, *op. cit.*, p. 198-201.

⁸"Library School Association News Letter No. 30," *University of Illinois Bulletin*, vol. 39, no. 39:8-9, May 1942.

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⁸"Library School Association News Letter No. 30," *University of Illinois Bulletin*, vol. 39, no. 39:8-9, May 1942.

"Taking" has also been produced at the University of Southern California Library since Ingles and McCague was published.⁹ Charts on various reference books have been prepared at the George Peabody College for Teachers and published by the Follett Book Company.¹⁰ Film strips, as well as other illustrative materials, may now be obtained from the publishers of some reference books, and film strips for units of instruction in the use of libraries and books have been produced at the Oregon State College Library¹¹ and at the University of Chicago. The last named were prepared by Rebecca Lingenfelter.

Reference Department's Share in the Reader's Library Handbook

One of the aids to a course in the use of the library, which often is substituted for it, is the handbook of the library. The reference department usually has a large share in preparing it, as not only the section for the reference room but much of the whole handbook has to do with the facilities for finding information.

The first thing the contributor to a library handbook needs to think of is the group or type of readers to whom it is to be addressed. An examination of twenty or thirty handbooks chosen at random from different types of libraries shows considerable variation in choice of information to be given and the type of presentation. There is the one evidently addressed to the sight-seer, which is confined to the architectural features of the building and has nothing to say about the collections. Another, specifically addressed in its foreword to readers, students and research workers, gives such full statistical information on the personnel of each department and the number and percentage of different forms of materials on each subject that it is of more value to other librarians and to library school teachers and students than of interest to most readers. There is the handbook of one public library addressed to the reader who evidently is not expected to help himself but only to want to be told where to go to find someone to help him, and the handbook of another public library which apparently expects at least some of its readers to be curious about the arrangement of books in the library and about the most useful reference tools in each department—what they look like and how to use them. This variation may be a healthy sign that each library has made its handbook for its own clientele. A description of what might be termed the standard college library handbook can be found in Lyle's *College Library Publicity*.¹² Most college and university library handbooks are addressed to the undergraduate student. Some of them have been made so excessively "attractive" by informal diction and humorous drawings that they are likely to seem trivial to the serious graduate student or faculty member. Others look so like old-fashioned textbooks that they would repel

⁹"News from the Field," *College and Research Libraries*, 2:370, September 1941.

¹⁰"School Libraries Section," *Wilson Library Bulletin*, 16:180, October 1941.

¹¹Smith, Xenophon P. "Visualizing Library Instruction," *Wilson Library Bulletin*, 15:247-48, November 1940.

¹²Lyle, Guy R. "College Library Handbook." In his *College Library Publicity* (Boston, Faxon, 1935), p. 46-48.

almost anyone from Freshman to president. Unless the library can afford to publish two handbooks, one for the faculty and research students and the other for the Freshmen, it would seem better to depend for interest upon pleasing typography and page setup and good clear plans and diagrams than upon a chatty style and funny pictures.

Some handbooks go into such detail about reference books and bibliographical methods that they are almost as comprehensive as course textbooks or manuals for self-education on the use of libraries. For most libraries these seem to be an unnecessary duplication of effort and expense unless the librarian can improve on what has been published by others (as in the case of the Enoch Pratt Library's *Guide to Reference Books*). The aim of the handbook should be to describe what is distinctive in the library and refer to other books for detailed information on practices and reference books common to all libraries.

What the reference librarian wants to get into the manual are directions on where to go and whom to ask for information and materials, simple instructions on the use of the catalog and indexes, regulations for the use of reference materials with their reasons, and information as to special reference services which the library offers, such as interlibrary loans and reading machines.

A library handbook for the faculty of a college or university may combine the directory features of the student's handbook with the descriptive information usually found in the handbooks of reference libraries like the *John Crerar Library Handbook* and the *Guide to the Reference Collections of the New York Public Library*, which stress special collections and bibliographical aids. It affords an opportunity also to explain the assistance which the faculty may contribute to the work of the reference department, such as care in the citations of readings to their classes and cooperation in the matter of instruction of students in the use of the library. An excellent outline for such a manual was included in an article on the subject in the *Texas Outlook* in January, 1940,¹³ and the first (known to the writer) library handbook specifically for the faculty was issued September, 1941.¹⁴

¹³Kennemer, J. D. "Library Handbook for the Faculty," *Texas Outlook*, 24:46-47, January 1940.

¹⁴University of North Carolina. Woman's College. Library. *Using the Library, a Faculty Handbook* (Greensboro, N. C., The College, 1941).

Reporting Literature Searches

Types of Literature Searches

It is a far cry from the short list of references compiled for the clubwoman to the full bibliographical report, with abstracts, of a "literature search" made for a specialist, although both are, after all, adaptations of practically the same performance to the varying needs of the clientele. For both it is likely that much more material will be examined by the reference librarian than is reported to the ultimate consumer. Careful selection of materials must be made in either case in order that no time shall be wasted by the user of the bibliography in reading duplicated, superfluous or misleading information. The books and articles chosen for the clubwoman must be within her powers of comprehension and should at the same time be authentic. This is not always easy to accomplish and may require not only a thorough search of the library's resources but also keen judgment of both books and personalities. The "research bibliographer," making and reporting a search of the literature for a technical worker,¹ a business or professional man, or a legislator, must be sure to cover everything and must be able unerringly to select the data needed either for the solution of a problem or as a preliminary to its setting-up. He must recognize data of negative as well as of positive value and also allow for the possibility of changing values, for as one technologist has said, "... a failure of fifteen years ago may be converted into a marked success today, because of the astonishing technological advances of recent years."²

Abstracting

The reference librarian who compiles a list of references for a club paper or a lecture may write a brief description of each item to indicate what sort of contribution it makes but will generally draw the line at abstracting the articles. The research bibliographer in a special library, on the other hand, considers it a part of his function to save the time of his patrons by writing abstracts, which sum up the information given in the articles. For this it has been said that he should "study conciseness of style," but write "complete clear sentences in good

¹For a full explanation of what a "literature search" in a scientific field involves, see Crane, Evan J., and Patterson, Austin M. *Guide to the Literature of Chemistry* (N. Y., Wiley, c1927).

²Wallace, L. W. "The Library and Liberation," *Special Libraries*, 31:244, July-August 1940.

idiomatic English."³ A detailed discussion of the qualities of a good abstract and methods for its attainment was presented to the Science Technology Group of the Special Libraries Association by the editor of *Chemical Abstracts* at the Indianapolis conference.⁴

The compilation of a bibliography for the use of the nonspecialist does not require the knowledge of the subject that is needed for a literature search for the specialist. The materials selected for the former must be such that he can understand them and therefore technical articles may be eliminated at once. The research bibliographer, on the other hand, must have a good understanding of the subject and also of the work and problems of his clientele. No one who is ignorant of chemistry can make an intelligent report of the literature on a chemical subject; neither can a person who knows nothing of legislative procedures prepare a history of a legislature's efforts to pass a law on a given subject. A knowledge of foreign languages is also generally required for specialized bibliographical work. A very slight linguistic proficiency may suffice to find articles in a foreign language on a subject, but only a person who is quite at home in the language as well as the subject of a technical article can make an abstract of it.

In addition to making and reporting a search for everything on a given topic to meet an urgent need the reference work of a special library or department is likely to include a continuous reporting and abstracting of the current literature in specific fields. The published abstracting services may be too broad in scope and not sufficiently specific to be wholly satisfactory in a company or organization. The librarian who knows the special interests of his readers can help to conserve valuable time for them by digesting the pertinent material and eliminating all else. In this way he supplements the commercial service.

³American Chemical Society. *Directions for Assistant Editors and Abstractors of Chemical Abstracts* (Columbus, O., Amer. Chem. Soc., 1939), p. 7.

⁴Crane, Evan J. "The Abstracting and Indexing of Scientific and Technical Literature," *Special Libraries*, 31:260-64, July-August 1940.

Work in Connection with Interlibrary Loans

Verification of Requests

Aid to research workers inside and outside of the library may involve the reference department in interlibrary loans. To be sure, in some libraries these are wholly or partly administered by other departments, but the fact that people are accustomed to appealing to the reference department for what they cannot find in a library naturally brings requests to that desk. Moreover, the need for bibliographical verification of many of the requests, coming both from within and without the library, calls for the expert and painstaking search which a reference department is prepared to make. It is possible to divide the work so that the reference department takes care of the personal and bibliographical aspects and some other department, order or circulation for example, handles the mechanical, clerical and business end.

Since success in securing an interlibrary loan often depends upon the accuracy and completeness of the references, it is most important that they be verified at the library in which the request originates as far as its resources permit. Some of the large libraries have found the burden of incomplete and incorrect references sent by other libraries so great that they have been obliged to refuse to lend anything which cannot be immediately located through their catalogs from the information furnished. The methods, described in the section on handling reference questions, for making sure that a request for a given book or paper cannot be filled by the library are applicable to the preparation of an interlibrary loan request.

Some librarians may feel that because they lack the elaborate bibliographical equipment of a large reference library they are excused from making the attempt to verify a title. They do not realize how much can be accomplished by an honestly thorough search of the materials at hand. A book inadequately referred to in an article in one encyclopedia may be listed completely in the bibliography following an article on the same subject in another encyclopedia, and the same thing is true of bibliographies in books on the subject. Periodical indexes and general indexes and bibliographies like the *Essay Index*, *Book Review Digest*, *Booklist*, the *Standard Catalog* and the *United States Catalog* are tools commonly found in libraries that can be used for this purpose and yet are sometimes overlooked.

Above all, the readers can be trained to keep track of the sources of their references by requiring them to give the source for every reference wanted on

interlibrary loan. A form card for interlibrary loan requests should provide space for recording the source, and if it proves impossible to verify the title this information passed along will help the librarian at the other end to know what bibliographies to use in verification. He will be much more inclined to spend a little time on the request if he knows that the librarian making it has done his best to clarify it. What the librarian of the smaller library can do to secure the good will of the larger library is described in an article originating in the John Crerar Library, a reference library noted for its generosity in lending.¹

Codes for Interlibrary Loans

The reference librarian should have a copy of the *Code for Interlibrary Loans*, approved by the American Library Association Council in 1940,² ready to show people who make unreasonable requests. If the library issues a handbook some parts of the code might well be quoted in the section telling of interlibrary loan service. Although this code was drawn up and discussed by and for the librarians of college, university and reference libraries, it should be observed by librarians of other types of libraries when asking for loans from the former. It does not necessarily apply in all sections to interlibrary loans between public libraries and state libraries or among college libraries which have entered into an agreement for the sharing of resources. More liberal codes are also in use in some regions, for example, the Pacific Northwest.³ As he continues in the work a librarian should be making a supplementary collection of individual libraries' regulations, by requesting a copy each time he asks for a loan from a library for the first time, for some libraries had established their own codes of regulations long before the general one was compiled and are of course at liberty to continue to enforce them for loans which they make.

Union Catalogs

In some states, counties and cities, union catalogs have been established in a central place through which it is expected that usually the libraries in that state, region or locality will clear their requests for interlibrary loans before applying elsewhere. A directory of these is in Downs' book on union catalogs.⁴ It is possible also to write to the Library of Congress for a search to be made in the union catalog there. Whether that should be done before writing to other libraries depends upon the distance of the would-be borrower from Washington and the degree of certainty as to the location of a copy of the materials wanted

¹Taylor, Kanard L. "Interlibrary Loans," *Library Journal*, 66:470-71, June 1, 1941.

²"Revised Code," *Library Journal*, 65:802-03, Oct. 1, 1940.

³"Interlibrary Loan Code—1940," *College and Research Libraries*, 2:318-19, 376, September 1941. Reprint of this article is available from *College and Research Libraries*, American Library Association.

⁴Van Male, John. "How the Bibliographic Center Works," *PMLA Quarterly*, 7:94-95, January 1943.

⁵Berthold, A. B. "Directory of Union Catalogs in the United States." In Robert B. Downs, ed., *Union Catalogs in the United States* (Chicago, A.L.A., 1942), p. 351-91.

in a nearer library. It would be foolish for a librarian on the Pacific Coast to write to the Library of Congress to locate a copy of a book which he is reasonably certain could be found in any one of the large university libraries in his part of the country. On the other hand, a librarian in Virginia or Maryland would be equally foolish to write around to libraries in New York and New England before trying to locate a copy through the Library of Congress union catalog. The location of early American books needed for research may be found in the American Imprints Inventory, a file of 14,000,000 cards deposited in the Wisconsin State Historical Society in Madison.⁵

The consultation of printed union catalogs like the *Union List of Serials*, if they are available, is the best first step for the types of materials for which they exist. Winchell's *Locating Books for Interlibrary Loans* is an index to many library catalogs and to author and subject bibliographies which locate copies. Any reference librarian who handles several interlibrary loan requests a month should make use of that both as an index to bibliographies already in his library and as an aid to the selection of bibliographies for purchase, for he should make a collection of tools for this purpose. He needs also to establish a routine and records for the requests so that in case anyone else has to take over his work he will know what has been done about them and when books are due to be returned. One record card for each book may be used to keep track of the whole process and later for statistics and permanent record. Such a card may at first be filed alphabetically by name of the person making the request; then when the loan has been secured, in a date file; and when it is returned, in an alphabetical file of libraries; and finally in an alphabetical author file for a permanent record in case the book is wanted again.

Records and Forms

If requests for interlibrary loans are numerous it will be found desirable to have a form for the readers to fill out, with space for other items to be filled in by the library. Also if an explanation of the privileges and of the regulations for interlibrary loans, with quotations from the *Code*, is drawn up for distribution to inquirers, it will help prevent the abuse of the interlibrary loan system. It is not expected that interlibrary loan service will be extended to undergraduate students.

Photographic Reproductions

It may be noticed that in the *Code for Interlibrary Loans* it is recommended that the librarian applying for a loan should state whether a photostat, photoprint or microfilm would be a satisfactory substitute. If the library or its readers have reading machines (they can be purchased for \$75 and make available materials that cannot be borrowed or purchased⁶) the person in charge of interlibrary loans will have to become familiar with the ordering and handling of

⁵"Imprint Slips," *Library Journal*, 67:486, June 1942.

⁶Kaplan, Louis. "Reference Work with Periodicals: Recent Progress and Future Needs," *College and Research Libraries*, 1:244, June 1940.

microfilms. He should add to his special collection of reference aids Cibella's *Directory of Microfilm Services*.⁷ It lists libraries and societies which furnish microfilming service or have microfilm collections and commercial films, with information concerning types of films and services offered and their costs. The *Reproduction of Materials Code*⁸ should stand beside the *Code for Interlibrary Loans* and be called to the attention of writers. A subscription to the *Journal of Documentary Reproduction* brings current information about the use of photography in the library. A list of the types of materials which are better filmed than lent and vice versa in an article by H. H. Fussler is an example of the practical value of this journal.⁹

⁷Cibella, Ross C. *Directory of Microfilm Services, Including Photostat Service* (N. Y., Special Libraries Association, 1941).

⁸"Reproduction of Materials Code," *A.L.A. Bulletin*, 35:84-85, February 1941.

"Policy with Regard to Reproduction of Library Materials," *Journal of Documentary Reproduction*, December 1940.

⁹Fussler, H. H. "Microphotography and the Future of Interlibrary Loans," *Journal of Documentary Reproduction*, 2:3-10, March 1939.

Participation in Public Relations

Need for Publicizing Reference Services

Libraries differ greatly in the apparent need for publicizing their reference services. Some are well prepared to help their public and yet their reference librarians, at first eager and then ennuied, find a childhood catch running through their minds: "Smarty, smarty, had a party—nobody came to it!" In other libraries information and reference desks are thronged all day long and their weary reference librarians wonder why the administration wants to attract any more inquirers. But even in the busiest of libraries the question may be raised whether the reference service is being given to those who need it most or only to the laziest or most inquisitive. It may be necessary to take some measures to let the first know what aid they might receive in the reference department if they would only bring their problems to the library. Moreover, it may be only by letting those who hold the purse strings know about the reference services actually being given that reference staffs may be increased to an adequate size. For this reason the chapter on "Developing Business Use of the Library" in Manley's *Public Library Service to Business* should be read by the reference librarians of all public libraries.¹

Devices which may be used to advertise reference service in various types of libraries are outlined in Shores' *Basic Reference Books*.² They may be divided into those used within the library building to attract attention to the department and those which extend beyond the walls for the purpose of drawing people into the library. The latter generally form a part of the whole library's publicity project and are likely to be under the direction of the head librarian's office or a special public relations department. The reference librarian's part then is mainly a matter of cooperation in furnishing materials for the publicity department or occasionally writing a feature article or giving a talk on reference books and reference work or arranging an exhibit.

Ethics of Publishing Reference Questions

One temptation the reference librarian may find necessary to resist is telling about individual cases of interesting or amusing reference questions. Although some reference librarians are very free in making these public, others feel that

¹Manley, Marian C. *Public Library Service to Business* (Newark, N. J., The Public Library, 1942), p. 35-45.

²Shores, Louis. *Basic Reference Books* (2d ed., Chicago, A.L.A., 1939), p. 410.

it is a breach of confidence ever to divulge any reference question. There is a happy medium. The length of time that has elapsed since the question was asked and the size of the community are factors to be considered. Although it is unethical to tell anyone of aid recently given in research or in business or professional affairs, it is not likely that publishing an account of the solution of a complicated reference problem several years later will give away any secrets that have not already come to light. Any piece of research in which the inquirer is engaged should be completed and published or used before the library refers to it publicly in any way. In a report of a large number of reference questions selected to show the variety of reference work done in a large city library, the individual question of a typical kind merges into the general background and is unlikely to cause embarrassment to anyone, but questions which can be related with complete anonymity in a large city might set a small town or college community to guessing and gossiping. In some instances of an unusually interesting question it might be possible to get the consent of the inquirer to publish it. If so, the fact that permission had been granted should be noted in the publication so that its readers may not be misled into thinking their questions might also be aired, without their consent, and so be restrained from bringing them to the reference librarian. Reporting in a publication for general consumption the story of any reference question in such a way as to hold the inquirer up to ridicule or to reveal his private affairs even though no names are mentioned, will of course, do the library more harm than good.

News Stories in Acquisitions of Reference Books

Interesting stories about a reference department are not limited to actual reference questions, however. The announcement of the acquisition of new reference books can bring people to the department if their potential reference value is vividly enough described. Loizeaux tells how to write news stories about reference books, creating interest by tying them up with some local celebrity or event or feature.³

Authorities on Library Public Relations

Wheeler's *The Library and the Community*⁴ and Ward's *Publicity for Public Libraries*⁵ are the standard textbooks on this subject. They give detailed instructions for the employment of the various methods of library publicity, many of which are suitable for all types of libraries. Ward, being the more recently revised, has considerably more on the use of the radio and his selected bibliography contains more recent references than Wheeler. Lyle's *College Library Publicity*⁶ contains and elaborates a chart showing the media to use for reaching different groups in the college community. All authorities stress the need for the librarians' making personal contacts outside the library. Branscomb even

³Loizeaux, Marie D. *Publicity Primer* (2d ed. rev., N. Y., Wilson, 1939), p. 32-33.

⁴Wheeler, Joseph L. *The Library and the Community* (Chicago, A.L.A., 1924).

⁵Ward, Gilbert O. *Publicity for Public Libraries* (2d ed., N. Y., Wilson, 1935).

⁶Lyle, Guy R. *College Library Publicity* (Boston, Faxon, 1935).

suggests that the college reference librarian should be outside the library building a good part of the time in communication with faculty members and attending classes so as to assure full cooperation with the work of instruction.⁷ Certainly, the reference librarian, who is engaged much of the time in meeting people in the library should be one of the library staff well suited to this personal kind of public relations. The ability to talk both to individuals and to groups is one of the qualifications of a good reference librarian.

⁷Branscomb, Bennett Harvie. *Teaching with Books* (Chicago, A.L.A., 1940), p. 201-02.

VII
IN CONCLUSION



Evaluating and Reporting Reference Work

Reasons for Attempts at Evaluation

Most reference librarians write annual reports, but they throw up their hands at the idea of evaluating their work and say that it can't be done. It is true that no one has yet discovered a valid unit of measurement and without this no standards can be set up for evaluation. However, although some people believe it is therefore impossible to measure reference work, others think that this has not yet been proved.

The question may be raised of the reasons for trying to evaluate reference service. Probably the most urgent one is the necessity that is likely to come upon any library of justifying the expense of all or a certain part of its work, or upon a department to prove its need of a staff with exceptional qualifications. Even granted that a reference department with a high-salaried staff and expensive book budget is accepted as essential to the community, it may be desirable to prove that it could be still more serviceable if its budget were enlarged or its program and service organization revised. Rice's remark to the catalogers in 1927 may be paraphrased for reference librarians in 1944: "The problem of [reference] costs must be attacked by [reference librarians] themselves or it will be attacked by executives less able to judge fairly as to what should be modified or eliminated."¹ Just because it is more difficult to produce objective evidence of the efficiency and value of a reference department than of some other departments of a library, less space may be given to it in the reports of a library and in library surveys, and therefore its importance may be overlooked and underrated by the readers of the report.

Lack of Research on the Subject

So far as is known, no real research has been done on the subject of the evaluation of reference work, although many discussions, more unpublished than published, have ended in defeatism, and a few experiments have resulted in collections of unreliable and incomparable statistics. In spite of the fact that keeping unnecessary and useless records and statistics is a waste of time and that no one has as yet sufficiently analyzed the problem to discover just what data are needed for evaluation, reference departments have for many years kept lists of reference questions of varying degrees of completeness and have counted questions classi-

¹Rice, Paul N. "Cost of Cataloguing," *Libraries*, 32:239-40, May 1927.

fied in various ways. Complete lists have their uses: they may be examined by librarians and social historians to discover trends in subjects in which the public is interested, by library school instructors to secure practice materials for their pupils, by writers of articles about the library to provide concrete and enlivening examples of library service. But their statistical value is doubtful.

Selective lists of questions are more useful than comprehensive lists to the reference department. Records of difficult questions answered are commonly filed in reference departments so that the information gathered may be used again if needed. Records of unanswered questions are analyzed in an attempt to discover and eradicate the causes of failure. A file of *all* questions asked does not contribute greatly to an evaluation of the service. It may provide striking examples of questions answered that were of great importance to certain individuals, but any general conclusions drawn would be purely subjective and would prove very little as to the value of the service to the community as a whole.

Inadequacy of Statistics Gathered

The counting of questions, though appearing to be an objective statistical method, has not usually produced any data that could form a basis for measurement of reference service because there has been no agreement on just what questions are to be considered reference questions. Attempts have been made in collecting statistics from several libraries to classify questions into groups, such as "passer-by," "fact-finding," "material-finding," "research," and "advisory" or simply "general" and "search." These categories, however, are ill-defined, and some of them are not counted as reference questions by all libraries.

Even if librarians can agree on just what shall be considered reference questions the mere count of those asked and answered can show nothing but the relative number of questions answered by different libraries or by different departments of a library or by the same reference department at different times. They do not in themselves even form a definitive index of the amount of work done because some questions require much more search than others. Claims for determining the efficiency of a reference department by including in a count of reference questions the time involved have been dismissed by reference librarians generally as futile because of variable factors affecting the time required to answer the same question on different occasions. These factors may include the availability of reference materials, the skill and knowledge of the reference librarian, and the personality and intelligence of the inquirer.

Baldwin and Marcus, however, assuming that the type of service rendered at reference and information desks has "a certain similarity in all libraries," have asserted that "a record of the number of questions asked and the amount of time spent in answering them does furnish a clue as to the effectiveness of the service given by any particular library."² Probably by "all libraries" they mean the thirty-seven public libraries participating in their study, for otherwise

²Baldwin, Emma V., and Marcus, William E. *Library Costs and Budgets* (N. Y., Bowker, 1941), p. 143.

their assumption is questionable. Although it is true that there is a "certain similarity" in all reference service, one would expect to find enough dissimilarities in the proportions of hard and easy questions asked in various types of libraries to distort a comparison of two libraries of different types made on the basis of the average amount of time spent on a question. As yet there are no compilations of statistics to prove this. Baldwin and Marcus found 5.4 minutes to be the average time for answering a reference question in the public libraries studied by them and Crookston found 3.6 minutes to be the average time for answering a reference question in the high school libraries studied by her.³ These averages, however, are both based on samplings of few libraries, thirty-seven and eleven, respectively, and they are not mutually comparable because, in the public library study, questions from the information and advisory services were excluded and in the high school library study the questions counted included "reference and information questions involving the use of the card catalog or books, periodicals, vertical files and bibliographies and interpretation of material."⁴ It should be noted that Baldwin and Marcus do not claim to have established a "definitive" standard, but only a "workable" standard.⁵

In any case an evaluation of a reference department on the basis of the number of questions it can answer per hour is merely an evaluation of the internal efficiency of the library. To start to make a standard of measurements for evaluation from this, according to Miles and Martin, is an attempt to build a structure "from the top down," without foundation.⁶ It is like trying to evaluate the adequacy of a city transportation system merely from statistics of the number of passengers per day carried by it. Just as the number of volumes per capita is no measure of the quality of a library's resources, so the number of questions answered is no measure of the quality of the reference service. Even though all questions counted in a public library were answered satisfactorily, the mere number would not show whether the library's reference service was reaching the people that it should, for these questions might all come from a limited group in the community. An exceptionally large number might indeed be the very reason why the reference service of the library was inadequate, for the demands of one group might be so insistent as to crowd out those of another. An adult reader with an important problem to solve in a short time, seeing a reference librarian besieged by a crowd of students, might turn away impatiently. This is not to say that the adolescents should be discouraged from coming to the library but that additional provision should be made for attention to the needs of both groups. "These ought ye to have done, and not to leave the other undone."

For this reason one might question the validity of the standard of meas-

³Crookston, Mary Evalyn, *Unit Costs in a Selected Group of High School Libraries* (U. S. Office of Education. Bulletin no. 11, 1941), p. 12.

⁴*Ibid.*

⁵Baldwin and Marcus, *op. cit.*, p. 144.

⁶Miles, Arnold, and Martin, Lowell. *Public Administration and the Library* (Chicago, Univ. of Chicago Pr., 1941), p. 251.

urement based on the ratio of reference questions to circulation by which it was claimed that because "some libraries" report as high as one-tenth as many reference questions as books circulated, a library circulating five books per capita annually to a community of 65,000 should answer at least 32,000 questions per year.⁷ A set of 20,000 questions answered in one library could be both more difficult and more important to its community and might be answered more satisfactorily than a set of 32,000 in another library. As Howard says: "The intensity of the work also is a factor in the establishment of standards. The speed with which reference questions must be answered inevitably affects the quality of the answers, or the amount of work required to answer the questions inevitably affects the number of questions which might be answered."⁸

A Pattern for Research

There is need for a series of research studies on the evaluation of reference service. Following the pattern outlined by Miles and Martin,⁹ they should seek to answer the following questions for various types of communities and in various types of libraries:

1. What are the appropriate objectives of reference service? Haygood has said: "It is of small avail, say the critics, to be told that such a number of people asked such a number of questions at the reference desk . . . unless we know who those people are. If most of them were students, it shows one thing about the particular library involved. If most of them were manual laborers or housewives or people on relief, it reveals other things about the library and about the society it serves."¹⁰ When the objectives are settled for public libraries in a given type of community, it should be possible, after a survey of a community and a study of the inquirers in the library, to determine, for example, whether or not the reference department is fulfilling its proper objectives when it devotes its time to answering the questions of school children. Having defined the objectives, the study of the problem should proceed to a consideration of the service program.

2. What are the requirements for fulfilling the objectives in terms of material, personnel and organization? Different classes of books, different organizations of materials (for example, the arrangement of a picture file used by teachers is usually different from one used by commercial artists), different qualifications of staff members and different staff schedules will be needed according to the groups of people served: business men, teachers, research workers, undergraduate students. The standard program having been determined, the study may proceed to the question of efficiency.

⁷Wheeler, Joseph L. "Report of a Survey of the Public Library Situation at Lancaster, Pennsylvania" (MS, 1941), p. 21.

⁸Howard, Paul. "The Functions of Library Management," *Library Quarterly*, 10:340-45, July 1940.

⁹Miles and Martin, *op. cit.*, p. 249-51.

¹⁰Haygood, William Converse, ed. *Who Uses the Public Library?* (Chicago, Univ. of Chicago Pr., 1938), p. 4.

3. What should an effective reference service cost? Presumably it costs more in a university library than in a high school library or a junior college, but does anyone know how much more, or how much it should cost in either type of library?

To answer these questions various data are needed, which so far have been only partially and sporadically collected. Community surveys and records, not only of questions but of the ages, occupations and purposes of the inquirers, are aids toward the establishment of criteria of social objectives. Surveys of library resources, regional or individual, manuals for conducting such surveys, and books on the selection and organization of materials on special subjects are paving the way toward evaluation standards. Studies, such as those of Guerrier,¹¹ Baldwin and Marcus,¹² and Crookston¹³ have made their contributions, positive or negative, toward establishment of standards of reference-service efficiency in certain sizes of public and school libraries. Nothing has been done of a comparable nature for other types of libraries.

There has been too much groping in the dark because of impatience to gather statistics before deciding exactly what are the significant data. Just as the tyro in reference work thrashes around in a reference collection without taking time to analyze the question and plan a procedure, so librarians trying to find their way on the unfamiliar ground of social research have tried to plunge ahead on the subject of evaluation of reference service without due consideration of the problem and formulation of a plan of procedure. The result is that, like the inexperienced reference assistant, they come to the premature conclusion that there is no answer to be found.

There are many pitfalls in the collection and interpretation of statistics and both a clear head and experience are needed to avoid them. The problem should be attacked by neither an inexperienced library school student nor a committee of preoccupied librarians, either administrators or reference librarians. Still less should it be undertaken by a research worker who knows nothing of reference work from the practical side. One misapprehension of the person who has not done reference work is that it consists entirely of answering reference questions. Actually, in any accounting of the time spent by a reference department in a library, allowance must be made and statistics gathered also for such activities as the selection and organization of materials, compilation of bibliographies, instruction and guidance of readers, all of which constitute reference service just as much as the actual answering of questions. Some of this was recognized by the Subcommittee on Budgets, Compensation and Schemes of Service of the Board on Salaries, Staff and Tenure of the American Library Association in its form for reporting reference described by Helm.¹⁴ Even this did not go far

¹¹Guerrier, Edith. "Measurement of Reference Service," *Library Journal*, 61:529-31, July 1936.

¹²Baldwin and Marcus, *op. cit.*

¹³Crookston, *op. cit.*

¹⁴Helm, Margie M. "Interpreting Reference Service," *A.L.A. Bulletin*, 34:115-16, February 1940.

enough in its analysis of reference work, as it omitted altogether the very important function of the reference department in providing and organizing materials for its own and readers' use.

Annual Reports

Although it has not yet been decided what data are really needed for evaluation of reference work, reference librarians are generally bound to make annual reports and for these it is advisable to keep some records of their accomplishments. If the library comes within the groups that are expected to make reports to some governmental or professional agency, certain statistics will be called for, such as the number of questions answered and the number of bibliographies compiled. To have any degree of reliability these figures must be collected currently. On the number of different kinds of units of measurement, the frequency with which they occur, and the number of persons who keep the records depends the need for special record forms or work sheets. A single reference librarian, making a simple count of questions answered can keep tally on a pad of dated slips, but a reference department of several persons keeping a record also of the length of time spent on questions and of certain data about the inquirers will produce a more accurate record if forms are provided for checking. If distinctions are to be made between types of questions not only will the forms be more complicated but it will be necessary to define the types carefully and to make sure that everyone reporting understands the distinctions.

The efficiency of a good deal of reference service depends so much upon speed in handling reference questions that reference librarians are quite justified in resisting the continuous collection of elaborate statistics. No library, therefore, should take over as a model for a daily record a work sheet that was prepared for a particular study and was never intended to be checked for an indefinite time. A distinction should be made between statistics which must be complete and those which may be samplings for limited periods of time. The former should be kept to a minimum of units, the tally for which may perhaps be kept inconspicuously by means of a mechanical counting device.

The reference librarian usually has a dual objective in writing an annual report: the fulfillment of the requirements of the person or agency to whom the report is made and propaganda for his department with which to influence whomever he expects to see the report. The pattern for his report may be all cut out for him or he may be left to his own devices to include what he thinks will fit the general order to report on the work of his department. If he is free to include whatever he thinks pertinent and to present it in whatever way seems best to him, he should take into consideration the purpose of the report and the persons for whom it is written. If it is merely for his superior officer to read and abstract for a purely administrative library report, it will be chiefly what Munn has called a "document of record,"¹⁵ consisting of whatever statistics will give a true picture of the amount and kinds of work done and materials

¹⁵Munn, Ralph. "Library Reports," *Library Journal*, 48:413-14, May 1, 1923.

added, with comparisons with previous years, and notes of changes in personnel and administration. To these records and notes is generally added a section for the purpose of promoting the department, including recommendations or requests for whatever the reference librarian thinks would improve the service—pleas for more assistants, more materials, better quarters and so on.

This kind of a report will also serve professional interests by furnishing factual information to other librarians and students of library service on the reference work done in a given library.¹⁸ The principal opportunity for originality in such a report is the need to think out what data will give the best picture of the year's accomplishments and to arrange and present them logically, concisely, and typographically in such a way that their significance can be quickly grasped, in a well-rounded account of all the activities of the department. Generally such a report or series of reports is most convenient to use if it follows the same pattern year after year. Nevertheless, the work of the department should be analyzed and the plan of the report should be reconsidered every year. Otherwise, the reports are likely to become stereotyped and changes in organization and work will not be reflected in them.

If, however, the report is to be published and read by the layman, or is to be used by the administration for publicity purposes, the proportion of propagandist material must be greater and the contents more varied because the reference department hopes thereby to attract more people both to take advantage of its services and to promote its interests. Statistics for the eyes of the professional reader must be supplemented by interesting "stories" for the nonprofessional. And here again the reference librarian finds himself up against the problem of breach of confidence. How specific can he be in his accounts of reference questions? This problem was discussed under participation in public relations, and therefore will not be reviewed here, except to point out that it will tax the reference librarian's originality and ingenuity to tell the thrilling tale of reference work without running the risk of losing the public's faith in it as a confidential service.

Reference Service a Fulfillment of the Library's Objectives

However impossible it may be accurately to evaluate the reference work of a given library, there is no doubt in the minds of its devotees that it is worthwhile for the community and the library. It is a fulfillment of one of the principal objectives of most libraries and thereby justifies its existence and its cost. The library which has not failed the community in its search for information, whether for practical purposes or for its intellectual improvement, has a hold on its constituents' affections and interest that ensures its permanency. It has become an indispensable public service because it saves the money of the individual by providing communal ownership of reference materials too expensive for most individuals to own; and by furnishing skilled bibliographical aid in

* ¹⁸Ridley, C. E., and Miles, Arnold. "Evaluating Library Reports," *A.L.A. Bulletin*, 28:394, July 1934.

the use of reference materials it saves the time of busy people and ensures possession of facts which by themselves they could not obtain.

The Reference Librarian's Rewards

In addition to the satisfaction that comes from participation in an important service to his community, the true reference librarian has his own self-centered pleasures in his work. His own thirst for knowledge for its own sake is constantly being slaked. He is like the little boy passing cakes at a benefit garden party who, on being asked if he had a chance to eat any, replied. "Oh no, mum, but I licks them as I goes." It is through "licking" as they go that reference librarians become more and more learned. Besides "book-larnin" the reference librarian also acquires an insight into human behavior, a sympathy with people, and now and then an acquaintanceship with some great person.

There are, moreover, thrills and variety in reference work that prevent stagnation. The reference librarian never knows what question is going to come next and whether he and the library's resources will be equal to it. If he has the instincts of a detective or a hunter, he will delight in the hard questions he has to solve and be exhilarated by their correct solution. If he has not, he had better stay out of reference work, for he will be neither happy nor successful in it.

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