

# The Practice of Reference

*Mr. Shores' paper was read at the meeting of the Reference Librarians Section on June 20, at the Boston Conference.*

EVERY FRIDAY NIGHT over a coast-to-coast hookup, a popular radio program exploits America's fundamental reference interest. The success of "Information Please" indicates the importance of questions and answers to our people and suggests the potential power of reference work once it is harnessed to the nation's needs and interests. Nothing short of an insatiable curiosity on an infinite number of subjects can account for the growing number of quiz programs and the consistent demand for such services as the Frederick Haskin Bureau disseminates through our daily newspapers.

That this national delight in questions and answers, the backbone of all reference and research, has been stimulated by world developments and by an increasing sociological interest at home seems certain. At the bottom of this national curiosity about things is concern about our society and where we are headed in this mighty world revolution now under way. Social surveys, educational investigations, governmental hearings all involve the marshaling of facts before an objective judgment can be rendered. It is only natural therefore that this constant search for information should influence the less serious pursuits of our leisure and result in radio quiz programs, movie contests, and newspaper crossword puzzles all of

which demand exacting reference service. And when to all this is added the grave business of war with its army of research workers needed to track down facts for defense, the responsibility of our reference calling appalls us.

There can be no question that the changes in our educational system, our social order, our civilization are steadily thrusting the reference worker into the class of most highly demanded and skilled workers. The only question is whether we who practice the craft of reference are ready for the new demands to be made of us. For us the time has come to decide whether we will take our place among the skilled technicians now keenly sought by our government as well as by private agencies, or whether we will see a new army of workers developed outside of our library profession.

Reference work as we have heretofore conceived it has probably most succinctly been defined by Richardson (26)\* as "the finding of books and the finding of facts." But even Richardson saw the broad responsibilities which this simple statement implied—mastery of sources, understanding of people for whom information from these sources was to be interpreted, and ability to teach others to help themselves. To him reference work was something very much like good teaching, only definitely superior. He saw in reference the foundation of good research. And so the

\* Numbers in parenthesis refer to libraries and readings at the end of the article.

reference librarian to him in those days was a cross between a good research worker and a good teacher, a cross which is most often sought for in school and college faculties today.

Strangely enough, ever since Richardson's formulation of reference philosophy, American college and school teaching has been approaching his ideal of good reference service. Gradually we have seen conventional classrooms give way to a sort of glorified reference procedure variously called honors reading, autonomous courses, independent study with the teacher steadily forced to take on the skills of the reference librarian. In 1934 I described what I then discerned as such a development, and several colleges, notably St. John's at Annapolis, have all but become "Library Arts Colleges."

What is more, certain advanced experiments have already been described in our professional and in educational literature which show clearly how close to good reference work the newest education is becoming. One institution is contemplating release of its instructors from part of their teaching duties so that they may give reference service in the library.

#### *Educators Approaching Reference Concept*

Now if educators on their side have been approaching the reference concept in their teaching procedures, what have we as reference librarians been doing? For the most part I believe we have been concentrating on the refinement of our techniques. I think many of us have been doing so with an awareness of the changing educational demands and our own probable new role. But I believe for the most part we have been more concerned with the means than with the possible new ends of reference work.

#### *Letter to Reference Librarians*

Partly to check this assumption and partly to discover some of the more promising aspects of reference practice in American libraries today, Sarah H. Griffiths, chairman of the Reference Section, and I addressed a joint informal letter to a selected group of reference librarians in college and public libraries, in which we asked for "detailed description of projects or policies which contribute to efficient reference service." And we added, "Of necessity this request is somewhat general because we do not wish in any way to shut out devices, techniques, or procedures that might appear to be too small or unrelated. We wish to emphasize that anything done in your reference department, large or small, that you think other reference workers would like to know about should be included and described in your own way.

"As specific as we can be, we would like to have from you

1. A detailed description of a favorite project that has stood the test of time and has been refined until it is in good order, or
2. A policy that tends to strengthen the department and to bind the staff into a unit."

Of course we realized that this was not one of those scientific inquiries for which research in the social sciences has become justly famous, and in which you mark one thing with an "X," a second thing with a check, and a third thing with a zero, and come out with a formula answer that delights the investigator and flabbergasts the practitioner. But we did realize also that in the present underdeveloped stage of reference literature any attempt to formalize answers in ad-

vance would defeat our purpose to obtain statements of reference practice as the reference practitioner of today would describe these practices.

Although the twenty-two libraries that replied (seventeen public, five university) do not represent a large number, they do cover a wide enough range in size and geographical location to provide a sample. And as a result of this preliminary query it is now possible to construct a more precise instrument for investigating reference practice in the majority of American libraries.

The nature of this instrument is suggested by the various aspects of current reference practice into which the descriptions of projects and statements of policies included in the twenty-two letters can be organized. Its three main divisions would deal with,

- I. Sources, their acquisition, organization, and interpretation
- II. Personnel, its in-training and in-service preparation
- III. Services, including fact finding, research, instructional, and publicity

#### *Reference Sources*

The first observation is the ever-widening concept of what a reference source is. Time was when the four thousand titles in Mudge or the smaller collection in Kroger were looked upon as the legitimate tools of those real reference craftsmen who always found their answers. To the public, "reference" has always meant something that could not be taken out of the library. More usually we have recognized certain types of sources—dictionaries, encyclopedias, yearbooks, handbooks, directories, atlases, serials, indexes, and bibliographies—as pure reference books. Today even this concept has been broadened to include a great variety of ephem-

eral and serial printed matter, and the more revolutionary audio-visual aids, from pictures and museum objects to films and radio recordings.

But as in the past, certain classes of reference sources are receiving particular attention because of their frequent and characteristic use for answering questions. Chief among these collections of sources are the so-called "quick reference" tools usually placed behind the reference desk or in proximity to the information booth. These consist of yearbooks, directories, statistical and financial services, civil service manuals, receipt books, and of course, a copy of the *World Almanac*. Generally they are marked with a special symbol, red dot (8), blue star (22), red star, and may include genealogy and annuals. Current issues of the periodical indexes and especially heavily-used tools like Thomas' *Register* may be placed very near the desk (13).

Public libraries and especially technology departments cite national defense demands as especially responsible for renewed emphasis on trade catalog collections (6). As many as eighteen thousand trade catalogs are reported (7) and several carefully worked out systems for making them speedily available are described. These include Princeton filing (1) or shelving in specially built bookcases with narrow upright shelves, and detailed indexing by firm and subject, either separately in the reference department, or in the main catalog (1).

As in the past, city and telephone directories are useful reference sources. From 200 to 250 of each can be found in most public libraries (16) and they are kept up to date either by the local telephone company (6) or through exchange with other libraries (15).

Among the other common types of reference materials that have become "favorite projects" through careful organization are pictures (11), clippings (13), college catalogs (8), museum objects especially related to local history (1), maps (12), a reference document depository (6), and a film of the local newspaper files (8). One library boasts of twenty-nine thousand separate pictures subject-cataloged, and a collection of museum objects that includes hoop skirts and spinning wheels (11).

#### *Organization of Materials*

In the organization of these materials for reference, considerable ingenuity is evidenced. Most commonly this creative ability finds expression in numerous and varied homemade indexes for which a strong local need is felt. Representative are indexes to periodicals not indexed by Wilson (8), to the location of periodicals in the *Union List of Serials* (9), local events, clubs, facts, educational opportunities, newspapers (8), quotations not covered by standard reference tools (14), bibliographies on useful subjects (13), reference materials in nonreference sources (19) (21), features in local newspapers (16), costumes (8), Edgar A. Guest (8).

Some of these indexes are so ingenious in detail that some description is here warranted. A useful index file (13) has been made up of stray, curious, frequently sought, miscellaneous, and otherwise promising facts. A "Local Book of Current Information" (16) features among other things the salaries of city, county, and local, state and Federal government officials, members of various boards of trust, local budgets, and so forth. In the same library local newspaper features such as columns, commentaries, and even

cartoons are indexed with date and paper indicated. An index to advertising pictures by subject as well as an index to other pictures by artist, nationality, title, and subject is notable. A systematic check of all local and state societies yields an up-to-date directory of officers, purposes, addresses nowhere else available (17).

Several libraries supplement printed sources such as the *Book Review Digest*, the *Bibliographic Index* (3) (21). Serials of local interest, unindexed books, and facts later than those found in the current *World Almanac* are indexed, and in the last two, placed in the books themselves (11). Likewise state documents are indexed for local references (15) and in the same library a glossary index by subject is maintained. By means of this latter index definitions of rare terms in obscure books and monographs are rescued from oblivion. A similar indexing enterprise undertakes to reveal obscure names of persons and places from out-of-the-way directories.

Other unusual indexing projects include that of "California Mineralogists' Reports Arranged by Name of Mine, District, County, Mineral" (6); second-hand catalogs which are clipped for local imprint items to answer questions about the value of patrons' attic discoveries (10); and city ordinances, another variation on the local indexing theme.

One of the most widely encouraged indexing projects is that to local educational opportunities (1). Two copies of each school catalog are received, one for clipping and pasting on the index card and the other for filing. Thus at a glance one can tell in how many places courses on a certain subject are offered.

Biographical indexing is quite common in spite of the two current biographical

services now available, thanks to the recommendation of this Reference Section. For the most part these indexes emphasize individuals "not so great" or local in reputation. One library adds death dates with rather gruesome regularity to its various "who's who's" (10). Another library (17) questionnaired its own local authors and prepared a who's who pamphlet for general distribution.

Two university libraries report significant indexes to reference materials in nonreference sources. One of these indexing projects (19) is confined chiefly to periodicals and does a splendid job of discovering directories, glossaries, statistics frequently lost in bound volumes of journals.

The other project (21) is called a "Classed Catalog of Reference Materials" and is really an index to reference materials in all nonreference sources. It brings to light bibliographies in current serials, for instance, lists of theses, items in various monograph series and in stack materials. Catalog-approved analytic form is used for this indexing which thus becomes a sort of supplement to the *Bibliographic Index*.

In summary, reference librarians are continuing to make a major contribution to the selection and organization of reference sources that cannot but aid materially all of those agencies and individuals now hotly engaged in the pursuit of stray facts and serious investigations.

### *Reference Personnel*

First among the policies that tend to strengthen the department and bind the staff in a unit are frequent round tables on new reference materials (3) and on questions and problems that have arisen in the daily tasks. Strong participation

by staff members in the formulation of procedures and the planning of organization is noted. Unanswered or difficult to answer questions are discussed by the staff.

But most significant in the twenty-two letters is the trend in the direction of subject specialization. The anomaly of a walking encyclopedia equally equipped to aid research in all fields appears to be on the way out even in medium-sized public libraries. Departmentalizing and assigning of individual staff members for reference duty to the departments related to the individuals's equipment (3) are accepted policy in public libraries. And in university libraries the tendency is to organize reference service by curriculum and research fields (22).

Strongly stressed by several reference librarians is the need for closer cooperation with the catalog department. Too often in the opinion of one (2) the reference librarian is inadequately trained in cataloging. "My experience has been that too many library school graduates think they want to do reference work and too few have sufficient background, the ability to organize material, or sufficient knowledge of cataloging . . . many of them can search out information, but few of them seem able to make records that others can use. Somewhere along the line the library schools (familiar professional goats) have failed to impress their graduates with the importance of the fundamentals of cataloging and many files are suffering from this defect."

Somewhat to offset this defect this correspondent continues, "we are trying here to have frequent short staff meetings of all those who do reference work . . . our plan is to pool information, to call attention to obscure sources, to examine all

new books, both reference and circulation, to keep a record of questions not answered satisfactorily, and to post frequently on the staff bulletin board new subjects added to the catalog and to the vertical file."

Another reference head requires all of her staff members to divide their time equally between the two departments (20). As she puts it, "a knowledge of the catalog is extremely valuable to readers. A knowledge of the point of view of readers seeking information is also of value to the catalogers in their work." Since an important segment of reference work in this library concerns itself with information about books, this cataloging-reference work combination provides the reference worker with good in-service bibliographic training.

Although the increasing emphasis on bibliographic training and subject background suggests increasing awareness of the reference worker's research responsibilities no corresponding intimations of impending greater teaching responsibilities is evidenced. True, university libraries are continuing variations of their freshman courses and some advanced bibliographic units for graduate students and teachers, but neither university nor public reference workers have yet succeeded in crossing the bridge that separates reference service from classroom teaching. The nearest thing to it reported is a high school cooperation plan (4).

### *Reference Services*

What then are the services that American reference librarians are performing? Aside from the time devoted to the organization of materials and personnel for these services, answering questions and promoting use constitute the principal functions. Fact finding, research, instruc-

tion, and publicity are the big four in the reference librarian's daily calendar of duties.

Fact finding questions are usually defined as those that can be answered quickly by one specific fact, such as the population of a city, the name of a place, the birth date of a person, etc. In some libraries these "short order" reference questions are handled mostly in the circulation department (11) and turned over to the reference department only if they require more than ten minutes search.

If questions are not immediately answerable most reference procedures call for recording of the question on a form slip with the reader's name and the time wanted. Answers are promised later and if the patron has a phone he is called (13). While the question is in the process of being answered it is kept in a visible file (11) or in a card quick-reference file (8). As soon as the answer is found the reader is notified and the record filed for future reference if the question is one which suggests future value (16). One reference librarian has even suggested that these cards containing answers be filed in the main catalog under subject (25).

If the assistant of whom the question was asked is unable to find the answer, he cites the sources consulted, initials the card, and hands it to the head of the department who then either assigns it to other assistants in succession until the answer is found or undertakes it himself. Failure to discover a satisfactory answer leads to appeals for outside help from authorities locally by telephone and out of town by mail (8). Continued failure results in submission to the fugitives department of the *Wilson Library Bulletin*.

A somewhat different procedure is followed with research questions. The dis-

inction between reference and research is probably not clear-cut, although there is a vague feeling that the former is popular and the latter scholarly. From the standpoint of the reference worker, research questions are the type that cannot be answered with a simple fact. They involve an unlimited amount of material and time and are never liquidated although they may be satisfactorily disposed of for the purposes of the inquirer.

Various policies and procedures have been formulated by reference departments. A psychologically simple and direct policy has been adopted by one department (14), "Get something into the inquirer's hands at once . . . even if it does not contain the full answer. This serves to occupy him and take him away from the information desk to a chair, giving the librarian a chance to collect pertinent data for him and to take care of other patrons."

Another department (10) has worked out an ingenious device for informing the reader who constantly leaves his seat, when his material is ready. "Cards fastened with Scotch tape to the upright section of a metal book end" advise the reader to inquire at the information desk for the answer to his reference question.

As for the actual searching techniques involved in locating answers and materials no department seems to have developed any such step by step routine as Carter Alexander has suggested (23). Possibly this is considered too elementary for a library school graduate who is at least expected to know basic reference materials well enough to relate sources to questions instantly. Two basic principles, however, well stated by Bagley (24) are generally accepted as necessary in handling reference questions: (a) Work from the simple to the complex, searching first in the more

obvious, popular sources and last in the specialized out-of-the-way tools, and (b) Proceed from the broad to the specific, beginning with the general background tool rather than with the detailed monograph.

In the course of answering questions some instruction in the use of the catalog and periodical indexes is generally given, but as one public library put it "no systematic instruction is given . . . students are encouraged to do their own research" (13).

#### *Instructional Projects*

Two instructional projects, however, are particularly worthy of note. One is a systematic cooperative scheme developed with the high school (4). The chief features are a schedule worked out with the teachers to prevent overcrowding of the public library reading room, cooperation in working out assignments, and staggered use of various reference materials. To accomplish this the reference librarian visits the high school daily to secure and discuss assignments and to provide teachers with lists of reserves and other related materials. The last three or four years of current magazines are kept in the reference room and other adjustments in the organization of the collection are made as dictated by the seasonal demands.

The other project is a library instructional program carried on for the nurses in the hospitals of the city (16). With some variation this program has been offered to other groups.

One other project which provides educational cooperation although it is not direct instruction is service to teachers and others carrying graduate work and writing a thesis or dissertation (1). From the time the candidate's thesis subject is

known, the library files a card and begins to accumulate citations to all materials in the library bearing on the problem. These materials are gathered and placed at the candidate's desk upon request, where they remain until the degree has been awarded.

The most popular methods of acquainting readers with available reference services and materials is through the media of exhibits, newspapers, organizations, and reports.

Significant exhibits in the fine and practical arts do much to call attention to reference services. Tying up displays of painting, sculpture, handicrafts, pottery, and so forth, with reference materials and with local individuals and groups is one publicity job undertaken by a reference department (1). In the same library industrial exhibits featuring products by local firms and displays of trade catalogs constitute another regular reference responsibility. Garden and travel exhibits in the spring (8) and window sill displays of reference tools helpful in various contests (8) are other projects.

A number of libraries edit for the local newspaper weekly "Information Please" departments. The column "Library Patrons Want to Know" is prepared from recorded interesting, unusual, or popular questions asked in the reference department (6). Occasionally some questions are made up to call attention to new reference tools recently acquired.

Most of the reference departments work very closely with organizations (17). Talks to clubs, and letters and telephone calls for business people are frequent (8). Advice to clubs in selecting topics for study, to home and business people for developing a home library, and to every one on where to buy and sell old and

rare titles is almost routine (14). One suburban library specializes in telephone reference service (5) and another (1) keeps a daily record of telephone calls, and publicizes them.

In addition to some statistics on the number of questions answered, most reference departments are now including sample questions and some descriptive notes on the nature of various investigations. One library (1) culls from the daily records of questions asked, representative ones which can be grouped around an alphabetic list of topics, such as addresses, animal life, architecture, dwelling places.

### *Summary*

The practice of reference in American libraries is on the threshold of something new and big. Librarians, educators, and research workers are all groping for some new understanding of the interrelations of their respective jobs. Increasingly, teachers are replacing conventional classroom recitations with reference procedures, and research workers are endeavoring to master reference techniques and materials, while the reference librarian struggles to extend his usefulness to both.

To date the reference librarian's efforts have seemed to focus on further refining his organizational skills and enlarging his knowledge of materials rather than on integrating his services with social needs. He has seemed to be less concerned with initiating services to society than with improving time-worn services previously established. As a result, others less well prepared technically have exploited the newer demands of social and educational surveys, teaching, defense, and even popular curiosity.

The real challenge confronting the reference worker is in the unconventional

demand from schools, from industry, from government that has not yet been formulated or verbalized into a recognizable reference question. The real question confronting our professional group is this, "Have we the imagination and the courage to initiate an information service that will speed up emergency research? Can we bridge the gap between formal classroom and informal library with an instructional service that will improve the learning process? Will we accept the responsibility of satisfying popular curiosity entertainingly?"

Paraphrasing the "jingo" British policy, "We have the sources, we have the personnel, and we have the services too." There is no question we can undertake the broader practice of reference if we will.

#### LIBRARIES AND READINGS CITED

##### *Cooperating Libraries—Public*

1. Bridgeport, Conn. (Sarah H. Griffiths, reference librarian)
2. Council Bluffs, Iowa (Eva T. Canon, librarian)
3. Detroit (Mabel L. Conat, reference librarian)
4. Haverhill, Mass. (Louise D. Crowell)
5. Highland Park, Ill. (Mary A. Egan, librarian)
6. Long Beach, Cal. (E. H. Davis, reference librarian)
7. Los Angeles (Althea Warren, librarian)
8. Louisville (Edna J. Grauman, reference librarian)
9. New York (Ralph H. Carruthers, in

- charge photographic service)
10. Pittsburgh (Alice Thurston McGirr, reference librarian)
11. Pomona, Cal. (Sarah M. Jacobus, librarian)
12. St. Paul, James Jerome Hill Reference Library (Helen K. Starr, librarian)
13. St. Paul Public (Irene Knapton, in charge industrial arts room)
14. Seattle (Doris L. Mitchell, reference assistant)
15. Des Moines, Ia. (Lucille Stull, reference assistant)
16. Rochester, N.Y. (Gladys E. Love, reference librarian)
17. Denver (Doris Wells, reference librarian)

##### *Cooperating Libraries—University*

18. Indiana (Estella Wolf, reference librarian)
19. Wisconsin (Louis Kaplan, reference librarian)
20. Yale (Anne S. Pratt, reference librarian)
21. Joint University Libraries (Frances Cheney, reference librarian)
22. Teachers College, Columbia University (Clara Esther Derring, reference librarian)

##### *Cited Readings*

23. Alexander, Carter. "Technique of Library Searching." *Special Libraries* 27: 230-38, Sept. 1936.
24. Bagley, W. A. *Facts and How to Find Them*. Pitman, 1937.
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26. Richardson, E. C. *The Reference Department*. American Library Association, 1911.