# TEACHING GENERAL REFERENCE WORK: THE COMPLETE PARADIGM AND COMPETING SCHOOLS OF THOUGHT, 1890–1990[1]

John V. Richardson, Jr.[2]

Because the early content of reference courses was determined by strong personalities, this article explores the educational influences of such pioneer individuals as Dunkin Van Rensselaer Johnston at the New York State Library School in Albany, Alice B. Kroeger of Drexel Institute, Isadore G. Mudge at Columbia University, and the next two editors of the monumental *Guide to Reference Books*. By examining the interwoven relationships among nine reference textbook authors who wrote the six leading textbooks, totaling thirteen editions between 1930 and 1987, this article identifies predominant worldview and competing schools of thought regarding the teaching of reference work.

Library schools throughout the United States have treated reference work as one of the core courses in their curricula since 1890, when the New York State Library School (NYSLS) at Albany offered an advanced, senior course entitled "Reference Work." Newly appointed as the reference librarian, Dunkin Van Rensselaer Johnston systematized the pioneering efforts of librarians such as Samuel Swett Green of the Worcester Free Public Library, Justin Winsor of the Boston Public Library, and Melvil Dewey at Columbia College who established general or ready reference work as a basic information service for library users. Reference work rapidly became a legitimate topic for advanced study; for

instance, Helen Sperry, a student at NYSLS, completed her thesis on "Reference Work in Popular Libraries" in 1894. In the 1890s, other pioneering schools including Drexel, Pratt, and Armour incorporated reference work into their one-year programs as a basic course.

Oddly, however, no systematic examination of the history of reference teaching nor any evaluation of the teaching paradigm in this field has been offered. Indeed, only the first few chapters in the history of reference teaching have been written [1].[3] The present article is the first comprehensive description and analysis of this topic. An examination of how instructors teach this subject could substantially improve service in all types of libraries, as the next generation of reference librarians enters the field. Furthermore, such an examination is especially necessary if truly expert systems in general reference work are going to emerge.

As a conceptual framework, this paper adopts Thomas Kuhn's position that textbooks posit a paradigm—the "normal science" or given way of doing things in certain fields. As Kuhn noted, "Textbooks expound the body of accepted theory, illustrate many or all of its successful applications, and compare these applications with exemplary observations and experiments" [2, p. 10]. As such, textbooks can reasonably be used to explore the understanding of a field by its authors, by its readers, and by the practitioners of that specialty.

In an earlier article, I demonstrated the utility of this approach in my examination of the teaching of government publications [3]. I also suggested that this model could be applied equally well to other areas in library and information science, thereby providing additional insight into the profession's teaching paradigms. Because the field has completed one hundred years of teaching this subject, it especially behooves reference faculty to reflect on this topic. Such introspection will aid the primary audience: graduate students of librarianship and, through them, most significantly, the users of the library's collection.

This article is not a history of reference work per se.[4] Nor does it provide a needed international perspective. For instance, turn-of-the-century scholar-librarians such as E. C. Richardson routinely relied upon the British Museum's *List of the Books Forming the Reference Library in the Reading Room* [6] and recommended it to would-be or novice refer-

3. Francis L. Miksa's transcriptions of student shorthand notes of Walter Biscoe's lectures in the School of Library Economy at the Columbia College must soon be considered as well because he is seeking a publisher for his work.

4. For research universities and colleges, this history is best traced by Samuel Rothstein, "The Development of Reference Services in American Research Libraries" [4], and Richard E. Miller, Jr., "The Development of Reference Services in the American Liberal Arts College, 1876–1976" [5].

ence librarians; instructors in pioneer library schools cited it as well. Similarly, one might ask what has been the United Kingdom's experience with the now multivolume *Guide to Reference Materials* by A. J. Walford [7] or our contemporary Indian colleagues' experience with Krishan Kumar's textbook [8].[5] Such a comparative approach, however worthwhile, is out of scope here.

To state my purpose positively, this article describes what textbook authors have been trying to do in their teaching of reference work to novice librarians and, more distinctively, states the way they think it could be. By identifying the common assumptions presented in these textbooks, I will reveal the operative paradigm in this field.

Two questions have guided the exploration of this topic: (1) What have textbook authors done? and (2) In what direction should instructors be moving in teaching general reference work to would-be librarians?

## Precursors and Supplements to the Modern Textbooks

The pioneer library schools depended primarily upon the lecture method to impart knowledge of reference books. Initially, no one thought to save the student's time in note-taking during these lectures; professors simply spelled out the author's name and the more difficult reference titles as necessary. By the turn of the century, however, instructors had adopted hectographed lists, and in conjunction with lists of books compiled by local libraries to increase the usefulness of their collections, a core list or basic bibliography of reference books emerged.

### Dunkin Van Rensselaer Johnston

As mentioned earlier, Johnston taught the first course in reference work ever offered. He was appointed assistant reference librarian at the New York State Library in 1883 and promoted to the head reference librarian's post in 1888; he started teaching in the NYSLS in 1890. Reflecting on Johnston's teaching methods at Albany, Josephine A. Rathbone, herself a reference instructor at Pratt Institute for nearly fifty years, wrote that he taught reference via "a series of epigrammatic comments on the

5. A good start on the international perspective is provided in Frank Gibbon's "From Librarianship to Library Science: The Professional Education of Librarians in the United Kingdom, the United States, and Australia" [9]. Of course, any analysis should include Denis J. Grogan's *Practical Reference Work* [10], and Donald E. Davinson's *Reference Service* [11]. Readers interested in examining material other than textbooks should consult Marjorie E. Murfin and L. R. Wynar's *Reference Service: An Annotated Bibliographic Guide* [12].

books" [1, p. 73]. These potentially sterile lectures were supplemented by practical problems based on actual reference questions encountered at the State Library rather than questions designed to illustrate various points of the particular reference books. His problem-oriented method encouraged the students to examine the tools firsthand. According to Rathbone, though, "his personality made the value of the course rather than any methods . . . he made every subject interesting because he was interesting" [1, p. 73]. For her, Johnston's reference course succeeded because of his "brilliant mind, a keen sense of humor and a broad culture" [1, p. 73].

Johnston encouraged each of his students to "handle a great variety of general reference books, e.g., indexes, dictionaries, encyclopedias, general and special, handbooks, statistical almanacs, registers, atlases, etc." [13, p. 40]. Indexes might appear at the head of this list of reference formats because Johnston was particularly conscious of his department's recent acquisition of many periodicals indexed by Poole's cooperative effort.

In any event, to help students in his reference course, Johnston immediately began compiling his own lists of the best reference books. He organized the list by format: dictionaries, general and miscellaneous handbooks, literary reference books, registers and statistical works, reference books in history, general and specialized periodicals, and periodical indexes. By 1899 this list had expanded to more than five hundred unannotated titles. Enough to justify widespread dissemination, it appeared as a sixty-page pamphlet entitled *Selected Reference Books* in the Library School Bulletin series [14, pp. 149–218]. Reprinted in 1903 as *Material for Course in Reference Study* [15], it was the earliest textbook for reference work. Following this same structural approach (namely, by format), other similar efforts began to appear across the country.

*Alice B. Kroeger*
Kroeger created what became the most authoritative list of reference titles while she served as librarian and director of the Library School of the Drexel Institute in Philadelphia [16, 17]. Like Johnston, she had frequently lectured on reference books in several of her library school's classes subsequent to 1894. Later, she taught a distinct course, "Reference Work and Bibliography," hoping that "by instruction in the use of reference-books and bibliographies, which is intended to give to the students such familiarity with these tools of the librarian as will enable them more quickly to meet the needs of the reading public" [18, pp. C62–C63]. She, too, valued problem assignments drawn from inquiries

made by readers along with occasional quizzes spanning the entire enterprise as well as the narrowest technical details.[6]

Based on her course outline, her *Guide to the Study and Use of Reference Books*—published by ALA in 1902—received an enthusiastic reception; shortly thereafter, a reprint edition was needed. (See table 1 for a bibliographical analysis of each edition in terms of edition, date, editor, number of titles covered, total pages, and cost.) According to the preface, the "selection of the [800] books in this volume has been made from a study of the reference departments of the principal libraries of Philadelphia, Boston, New York, St. Louis [her family's home town], and Washington, and practically covers the course of study in reference books as pursued in the Drexel Institute Library School" [16, pp. vii–viii]. To assist students, she included an oft-reprinted "How to Study Reference Books." As a result, Kroeger shifted the discipline's discussion from definition (namely, what to teach) to process (namely, how to study reference).

An astute observer of other practitioners, Kroeger also realized that many reference librarians simply used the titles with which they were already familiar. In response, she appended a subjective "List of 100 [*Best*] Reference Books [20, pp. 80–82], based on her own experience answering readers' questions in the library.

The question of whether there was an irreducible minimum number of reference titles that any novice librarian must know and use occurred to Kroeger. In her mind there were only four types of sources—"no library, however small and whatever its character, can be complete without a dictionary, an encyclopedia, an atlas, and a biographical dictionary" [16, p. 80].

If the order in which she presented these was important, she broke from it in her published *Guide* by reordering encyclopedias and dictionaries, followed by special subjects including biography, geography, and periodicals. In justifying this new format order, Kroeger wrote that her work was arranged "to a certain extent in the order of usefulness of the books" [16, p. vii]. In this respect, she split with such scholar-librarians as E. C. Richardson,[7] who, in 1893, argued that "the following classes are reference books under all definitions: general bibliographies, general encyclopedias, general dictionaries of words, persons, places, or things, atlases, and general indexes" [22, p. 254].

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6. Kroeger best expresses her methods and principles of teaching reference in two other documents: "Library School Pedagogics" (n.d.), and "Evolution of the Curriculum of the Drexel Institute Library School [19].
7. Richardson emphasized the managerial function in his *The Reference Department* [21].

TABLE 1

BIBLIOGRAPHIC CHARACTERISTICS OF THE ELEVEN EDITIONS OF THE "GUIDE TO
REFERENCE BOOKS," 1902–92

| Edition | Date | Editor | Titles | Total Pages | Cost ($) |
|---|---|---|---|---|---|
| 1st | 1902 | Kroeger | 800 | 104 | 1.25 |
| 2d | 1908 | Kroeger | 1,200 | 147 | 1.25 |
| 3d | 1917 | Mudge | 1,790 | 235 | 2.50 |
| 4th | 1923 | Mudge | 2,225 | 278 | 3.00 |
| 5th | 1929 | Mudge | 2,900 | 370 | 4.50 |
| 6th | 1936 | Mudge | 3,873 | 504 | 4.25 |
| 7th | 1951 | Winchell | 5,500 | 645 | 10.00 |
| 8th | 1967 | Winchell | 7,500 | 741 | 15.00 |
| 9th | 1976 | Sheehy | 10,540 | 1,015 | 30.00 |
| 10th | 1986 | Sheehy | 14,000 | 1,560 | 60.00 |
| 11th (projected) | 1995 | Balay | 18,000 | 2,000 | 120.00? |

SOURCES.—Kroeger [16, 17], Mudge [25, 26, 27], Winchell [31, 34], Sheehy [36, 37], and Balay (see n. 9 below).

Her readers demanded a second edition. The 1908 volume contained more foreign works among the now 1,200 titles. She also acknowledged James I. Wyer's contribution (see below). Due to her untimely death, however, another editor would have to issue the third edition.

*Isadore G. Mudge*
Mudge served the longest period as editor of the *Guide to Reference Books*. A student of Johnston's at Albany, she gained extensive experience in reference work: head of reference and instructor of "Elementary Reference" at the University of Illinois (1900–1903);[8] head librarian, Bryn Mawr (1903–8); part-time instructor of "Reference I, II, and III" as well as of documents at Simmons College Library School (1910–12). Ironically, after Kroeger's sudden death in the fall of 1909, the American Library Association Publishing Board approached Mudge, then a reference librarian at Columbia University, to take over the task of issuing supplements to Kroeger's *Guide*. Several years earlier, Mudge had had the same idea as Kroeger—to publish a list of reference books—but Kroeger already had a proof copy of the list compiled by the time the two of them met to discuss this topic of mutual interest at an American Library Association meeting [1, p. 166].

8. A two-page typed outline for the two semester course, "Elementary Reference," providing the "Program of Course" and "Order of Topics and Lectures," survives in the University of Illinois' Library School Archives [23]. Although she claims originality only for the five-minute in-class oral review of a reference book, Mudge expresses her early methods and principles of teaching reference in the brief article: "Instruction in Reference Work" [24].

Mudge's new edition of the *Guide* followed the same organization, by format, as did earlier volumes [25]. In 1923, she concurred with Kroeger that "certain basic works, a dictionary, an encyclopedia, an atlas, a biographical dictionary," are essential, but she went further, stating that a "book of quotations, handbook of statistics, a state or government manual, are needed everywhere" [26, p. 231].

Interestingly, Mudge's third edition, published in 1917, acknowledged that students in library schools were one of her primary user groups. A fourth edition followed in 1923. Anticipating Wyer's nearly completed textbook, Mudge asserted that her new fifth edition would provide "a textbook for the student, who either independently, or in library school, library training class or college class in bibliography, is beginning a systematic study of reference books" [27, p. v]. Mudge used her own work as a text in classes that she taught at the New York Public Library (NYPL) from 1915 to 1925 and then at Columbia, where she was a lecturer and then associate professor in the School of Library Service from 1927 to 1938.

As her own experience grew, so did her ability, and "in her teaching, she eventually developed a succinct phrase that she believed encapsulated the components of effective reference: material, mind, and method. The 'method' was of special import and suggests the precursor to today's concern for effective search strategies. The reference librarian's approach to the question, the analysis of the question and its background and, of course, the identification of alternative approaches were basic to success in the encounter" [28, p. 265].

She never published this approach, so Mudge's methodological ideas would await fuller articulation by one of her students, Margaret Hutchins (see below). Nevertheless, when Mudge died in 1957, she had established a reputation as "the best known and most influential reference librarian in the history of American librarianship" [29, p. 377; 30, pp. 287–91].


*Constance M. Winchell*

After Mudge retired in 1941, the Editorial Committee of the American Library Association approached Winchell to carry on the work for the forthcoming seventh edition of *Guide to Reference Books* [31]. She was well prepared.

After taking her A.B. in humanities from the University of Michigan, Winchell received her certificate in librarianship from the NYPL Library School in 1920 and then her M.S.L.S. from Columbia's Library School in 1930. She had already joined the reference library staff at Columbia University. Winchell advanced through the ranks: reference assistant,

1925–33; assistant reference librarian, 1933–41; and finally, chief reference librarian, 1941–62 [28, pp. 178–79; 32, pp. 163–65; 33, p. 1195].

Without explaining what she meant by the term "principles" (perhaps she would use "paradigm" today), Winchell wrote that the "fundamental principles of reference work remain more or less constant through the years" [34, p. vi]. Despite this fact, she broke with the traditional order of formats, claiming a radical departure from all earlier editions with the new eighth edition of 1967. No longer following the Dewey Decimal Classification, she divided the work into five major sections. In part A, "General Reference Works," she shifted the order of formats to include bibliographies first, followed by encyclopedias, dictionaries, periodicals, newspapers, government publications, dissertations, biography, and genealogy. Unlike general reference work, her four subject fields demanded a different order: "(1) Guides and manuals; (2) Bibliographies; (3) Indexes and abstract journals; (4) Encyclopedias; (5) Dictionaries of special terms; (6) Handbooks; (7) Annuals and directories; (8) Histories; (9) Biographical Works; (10) Atlases; (11) Serial Publications" [34, p. vi]. Her only explicit justification for this change was that it was consonant with "the content of courses in library schools" [34, p. vi]. Like earlier editors, she intended her work to serve as a "textbook for the student who . . . is pursuing a systematic study of reference books" [34, p. vi]. In the October 1955 issue of *Wilson Library Bulletin,* David Kaser summarized the sentiment of an entire generation of would-be reference librarians fresh out of library school: "Have Winchell; Will Travel" [35].

*Eugene P. Sheehy*
In 1961, as preparation for assuming the *Guide*'s full editorship [36, 37],[9] Eugene Sheehy took on the task of preparing "Selected Reference Books" [38], the semiannual supplements that appeared in *College and Research Libraries.* When the ninth edition appeared in 1976, Sheehy was listed as the fourth editor.

As long as the *Guide to Reference Books* was small in size and modest in cost,[10] teachers of reference work could rely upon it as a "text." Over the course of six decades that dependence lessened until the current editor had to make an explicit confession. "Although there has been less and less emphasis in recent years on the *Guide*'s early function as a study aid for library school students and greater stress on its use by the

9. The eleventh edition is projected to appear around June 1995, according to Robert Balay, the new editor.
10. Quoted in the preface to the ninth edition, Constance Winchell advised Sheehy: "Try not to let it get as big as the Manhattan telephone directory" [36, p. ix].

practicing librarian and research worker, the criterion of *usefulness* which governed Miss Kroeger's first edition remains salient" [37, p. ix]. Sheehy continued to accept Winchell's rearrangement of part A, "General Reference Works," desiring only to delete one small subsection because it was repeated elsewhere in the *Guide*. Otherwise, the overall arrangement, as evidenced by its letter codes, followed the main-class notation of the Library of Congress classification scheme, which was itself informed by the letter symbols used by Cutter in his expansive classification. Wrongly, the *Guide* recently came under attack for following conventional thought regarding its arrangement by formats. Dickinson [39] naively accused it of being a historical rather than a dynamic guide to reference works, without realizing the importance of certain traditional assumptions—what I shall call the complete paradigm—to which it has been steadfast and true.

### The Textbooks

Harshly critical of library schools' dependence on the lecture method of imparting knowledge, the 1923 report by C. C. Williamson to the Carnegie Corporation served as a major impetus for authors to write the necessary textbooks [40, 41]. The subsequent establishment of accrediting agencies, notably the Board of Education for Librarianship suggested by Williamson, was another factor calling for an improvement in the quality of instruction. Funded by a small subvention from Carnegie, the American Library Association enlisted the services of W. W. Charters, a professor of education at the Carnegie Institute of Technology, to develop a series of textbooks—one of which was James I. Wyer's *Reference Work* [42, pp. 209–23].

In the interim, however, it was little wonder that a bibliography of reference materials such as the *Guide to Reference Books* could find a niche in the teaching of reference work. Its paradigmatic influence on the textbooks for reference work is addressed next. In the following subsections, the date(s) in parentheses represents the appearance date of the author's textbook.

### James I. Wyer (1930)
Astutely intending his own work to complement Mudge's *Guide,* Wyer nostalgically dedicated his textbook to the New York State Library School, which had recently merged with the New York Public Library School to create Columbia's program [43, p. v]. His book appeared as the second in the W. W. Charters series of Library Curriculum Studies funded by the Carnegie Corporation.

Intending his textbook for students and prospective librarians, Wyer adopted a tripartite organizational scheme: materials, methods, and administration. As for reference materials, he does not list specific titles but prefers to deal with classes or groups of materials that by their "character and content are of most value to the scholarly service which libraries seek to render" [43, p. xi]. He concurred with the *Guide*'s editors that dictionaries are most important, followed by encyclopedias, atlases including the related formats of maps and gazetteers, and bibliographies. Interestingly, Wyer omitted biographical dictionaries but innovatively—compared to the formats covered in the *Guide*—added yearbooks, directories, indexes, and catalogs to his list of what he considered conventional reference book formats. The relative presentation order of formats appears in table 2. Pressed to select "the cornerstones of a reference collection," Wyer chose dictionaries, encyclopedias, and atlases [43, p. 22].

Wyer never presented a straightforward rule of thumb for how one answers a reference question in the methods section of his text, perhaps encouraging the student to discover the heuristic for herself.[11] Instead, the methods section was largely a description of the reference process or what Wyer prefers to call "the use of print" in the specific subject fields of chemistry and fine arts and in four different types of libraries. Nevertheless, Wyer argues that for any "reference question [to be] completely and satisfactorily answered involves three factors: inquirer, reference librarian, sources of materials" [43, p. 96]. To paraphrase Wyer, the reader must connect with the material via the reference librarian, otherwise there is an incomplete circuit.

In his discussion of the psychological interaction, Wyer's terminology in referring to the person on the other side of the desk is significant. In the first portion of his text, he passingly refers to "library users" and only once to "patrons." Otherwise, he consistently refers to the public as readers or inquirers. In his section on management, he also reports on the psychological preparation, or mental traits, necessary to succeed as a reference librarian [43, pp. 235–38].

Importantly, Wyer had identified the three dimensions basic to teaching general reference work—the material formats, the reference method, and the mind of the librarian as well as the mind of the reader or inquirer. While subsequent textbook authors may have accepted this prescription as the scope of reference work, most emphasized only the material formats without further debate.

11. As used in this article, "heuristic" means the overall strategy; this understanding is common in computer science parlance in contrast to the tactical meaning used in a military context.

*Louis Shores (1937, 1939, and 1954)*

After turning "his back on the humanistic culture" [44, p. 4] represented by a B.A. in English from the University of Toledo, Shores earned his B.S. in library service from Columbia University. In 1929, he studied reference under Mudge, "a great teacher who was herself the personification of everything desirable in a reference librarian" [45, p. 369]. After that he undertook advanced study of social science techniques in the University of Chicago's Graduate Library School, and then earned his Ph.D. from Peabody College in 1934. His earliest reference textbooks reflect the social science "methodological" concerns picked up in his advanced course of study.

The so-called preliminary edition of *Basic Reference Sources* appeared in a paperback edition in March 1937 [45] and was based "on nine years of reference experience in school, public and college libraries, and seven years of reference teaching in four institutions"—as professor and director of the Peabody Library School, 1933–46, and professor at McGill, summer 1930; Dayton University, summer 1931; and one other unidentified school [45, p. v; 46, pp. 446–47; 47, p. 632; 48, pp. 123–29].[12] Most of his text was organized by six types of reference materials: dictionaries; encyclopedias; continuations: yearbooks, directories, atlases; serials; indexes; and bibliographies. He instituted some innovations within formats; for instance, dictionaries are arranged by their vocabulary size.

Shores's interest in quantitative issues appears several times through the text. First, Shores responded to the question of the minimum number of reference titles that a beginning reference librarian needs to know. Stating that "the assumption of the core collection is certainly debatable" [50, p. 241], he admitted that day-to-day "reference is done with a comparatively small collection of titles" [50, p. 241]. Consequently, he listed the top ten titles that he thought should be in any library's ready reference collection. Shores quoted an unnamed source saying that 80 percent of all reference questions could be answered using an unabridged dictionary and the *World Almanac*; by adding an encyclopedia he concluded that "the estimate can be raised to 98 percent" [45, p. 375].

His first [45] and second [51] editions included the statistical summary of his spring 1935 reference book survey, entitled "Core Collections."

12. Shores's ideas and career offer interesting possibilities for biographers, but at this point only brief biographical entries and unpublished sources of background information about Shores exist. Nevertheless, I have benefited from discussions with Lee Shiflett, who is writing a book-length biography, and from Dean Rowan's unpublished term paper "Louis Shores and His Feelings about Reference" [49].

**TABLE 2**

**RELATIVE PRESENTATION ORDER OF FORMATS IN REFERENCE TEXTBOOKS, 1930–87**

| REFERENCE FORMATS | WYER | SHORES 1st ed. | SHORES 2d ed. | HUTCHINS | SHORES, 3D ED. | KATZ, 1ST ED. | CHENEY, 1ST ED. | KATZ 2d ed. | KATZ 3d ed. | CHENEY AND WILLIAMS, 2D ED. | KATZ 4th ed. | KATZ 5th ed. |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Dictionaries | 1 | 1 | 1 | ... | 1 | 10 | 6 | 12 | 11 | 6 | 10 | 10 |
| Encyclopedias | 2 | 2 | 2 | ... | 2 | 5 | 7 | 4 | 4 | 7 | 4 | 4 |
| Atlases | 3 | 5* | 6 | 4 | 5 | 13 | 9 | 13 | 12 | 9 | 11 | 11 |
| Bibliographies | 4 | 11 | 10 | 1 | 11 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Yearbooks | 5 | 3* | 3 | ... | 3 | 6 | ... | 6 | 6 | ... | 6 | 6 |
| Directories | 6 | 4* | 5 | ... | 6 | 12 | ... | 7 | 9 | ... | 8 | 8 |
| Indexes/ abstracts | 7 | 10 | 8 | ... | 10 | 4 | 4 | 3 | 3 | 4 | 3 | 3 |
| Catalogs | 8 | ... | ... | ... | ... | ... | 2 | 2 | 2 | 2 | 2 | 2 |
| Handbooks | ... | ... | 4 | ... | 7 | 8 | ... | 8 | 7 | ... | 7 | 7 |
| Serials | ... | ... | 7 | 7 | 9 | † | ... | ... | ... | ... | ... | ... |
| Magazines/ periodicals | ... | 6 | ... | 6 | ... | 2‡ | ... | § | § | ... | ‡ | ‡ |

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| Newspapers | ... | 7 | ... | ... | 3‡ | ... | § | ... | ... | ‡ | ‡ |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Society/institution publications | ... | 8 | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| Government publications | ... | 9 | 9 | 2 | 14 | ... | 14 | 13 | ... | 12 | 12 |
| Biographical sources | ... | 9 | ... | 3 | 11 | 5 | 11 | 10 | 5 | 9 | 9 |
| Statistical sources | ... | ... | ... | 5 | ... | 8 | 8 | ... | 8 | ... | ... |
| Manuals | ... | ... | ... | 8 | 9 | 9 | ... | 8 | 9 | ... | ... |
| Audio-visuals | ... | ... | ... | 14 | ... | 3‡ | 3‡ | ... | ‡ | ‡ | ‡ |
| Pamphlets | ... | ... | ... | ... | 7 | ... | ... | 5 | ... | ‡ | ‡ |
| Almanacs | ... | ... | ... | ... | 7 | ... | 5 | 5 | ... | 5 | 5 |
| Total formats covered | 8 | 11 | 10 | 9 | 14 | 9 | 14 | 13 | 9 | 12 | 12 |

*Treated collectively as continuations.
†Treated collectively as serials.
‡Treated as bibliography.
§Treated as indexes.

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The first edition grouped 117 titles into six reference formats, where each title was distinctively labeled "essential" or "desirable" according to responses by school, public, and college reference librarians as well as reference instructors at Columbia, Emory, the University of North Carolina, and Peabody.

Two years later, readers of his second edition found modest changes, though it continued to follow the same outline based on format or type of reference material [51]. The former chapter on continuations became yearbooks, handbooks, and directories. Rather awkwardly, he referred to atlases as "representations" in this new edition. He grouped serials, indexes, and government publications in a chapter by themselves, as were bibliographies. More logically, Shores moved the core collection to an appendix but organized it alphabetically by author, ignoring the role of format.

Despite the passage of nearly twenty years, his last edition of 1954—retitled *Basic Reference Sources*—reflects relatively few changes in Shores's "structuralist" thinking [52]. Shores, like other structuralists, held that the primary principle of organization was still the format of the reference material, although he more clearly recognized that special subjects belong in a separate section, which he labeled part 2.

He conceded a paradigmatic shift in emphasis by subtitling the third edition "an introduction to materials and methods." Nevertheless, his own emphasis remained on the former. Shores came down on the side of reference materials, characterizing the debate as teaching the books "per se" as opposed to teaching the titles only "incidentally" [45, p. 5]. Furthermore, Shores discussed functional concerns briefly, mainly the meaning of reference work. The two separate chapters—the introduction to reference and reference organization—found in the first and second editions were combined into a single introductory chapter, now called "The Practice of Reference."

Basing this chapter on ALA's functional analysis work of the early 1940s, Shores defined for the novice what reference is, but not how to do reference work. He rejected case studies of reference situations or scenarios involving problems such as difficult inquiries, inarticulately expressed inquiries, and potential ethical conflicts. For Shores, method really only meant three things: (1) the art of abstracting, (2) citing through comparative bibliographic form, and (3) the art of annotation [50, p. 244]. This approach is more accurately called reference literary criticism. Confident for the most part that John Dewey was correct, Shores's students learned by doing rather than being told how to do it [50, p. 244].

In the first edition of *Basic Reference Sources* (March 1937), however, Shores did list three different and detailed heuristics of how novice

reference librarians should solve reference question problems. He also provided a list of thirty-seven—expanded to forty-one in the second edition—"representative question types and the probable kinds of reference tools which hold the answer" [45, pp. 384–85; 51, pp. 405–8]. This approach strongly echoes Hutchins's heuristic that she published in the January 1937 issue of *Library Quarterly* [53]. By the third edition of 1954, Shores explicitly encouraged Hutchins's heuristic of answering reference questions by analyzing and classifying the question according to the "proper answer source" [52, p. 9]. Nevertheless, Shores still emphasizes format and, only secondarily, management issues in his brief, introductory first chapter. Hence, Shores is primarily a structuralist (namely, one who emphasizes an approach by format) in his orientation to reference work.

The third edition of Shores's text continued to be reprinted into the next decade—the ninth printing occurred in August of 1965.

*Margaret Hutchins (1944)*
Hutchins graduated Phi Beta Kappa from Smith College and in June 1908 she earned a B.L.S. with honors at the University of Illinois where she studied reference under Frances Simpson, to whom she dedicated her textbook. Entering reference immediately after graduation, she stayed at Illinois through 1927 except for two summers, 1926 and 1927, when she taught at the Chautauqua Library School [54, pp. 123–27; 55, pp. 259–60].[13] Her work as a reference specialist at the Queens Borough Public Library resulted in a 1930 "Trial List of Books Recommended for Reference Use" [57]. "In writing to Phineas Windsor to request a release from her Illinois commitment she said, 'It offers the opportunity to teach reference to the training class'" [54, p. 124]. Apparently she felt called to teach.

During this same period Hutchins also taught one summer at Columbia's School of Library Service. Desirous of more advanced training, she returned to school, studying under Isadore G. Mudge in 1929/30, as did Louis Shores and Constance Winchell. Hutchins was awarded an M.L.S. from Columbia University in 1931 and joined the School of Library Service as an instructor that July. She rose to assistant professor in 1935 and retired in 1953, having served as an associate professor since 1946.

Her 1944 textbook, *Introduction to Reference Work*, represents the culmination of a long career in reference and its administration—"thirty-

13. Hutchins deserves a fuller biographical study; the Columbia University School of Library Service archives contain the "Hutchins Papers." Fortunately, some of Hutchins's own teaching material has survived [56].

five years devotion to the subject, two thirds of which were spent in actual practice of reference work in university and public libraries" [58, p. v]. Rather than revise Wyer's now dated work or make a detailed survey of reference materials as Shores had, Hutchins's text "deals with the principles and methods of reference work in general" [58, p. v].

Adopting Mudge's method, which had been taught to her at Columbia, Hutchins explicitly stated the heuristic process of answering questions for the first time: "The study of reference books [is] not, however merely a multiplication of books, but types of books, with a training of the power to analyze a question or problem and connect it, first, with the proper type of book and, second, with the right individual book" [53, p. 103]. In chapter 4, she similarly stated that reference work is a reasoning process involving the classification of the question followed by the formation of hypotheses. Not unlike Shores's statement of Mudge's method, the rule of thumb was to interview the inquirer to clarify the question and then classify the question in relation to type of reference material (that is, format).

Hutchins posited four categories of questions: (1) bibliographical, including use of the card catalog, government publications, and quotations; (2) biographical; (3) historical and geographical; and (4) current information and statistical sources. These categories become separate chapters in the second part of her textbook wherein she points out problems and pitfalls of such questions to the novice reference librarian. Specific reference titles received scant attention except as exemplars in the process. In classroom lectures and discussion of reference titles, Hutchins argued, by quoting W. C. Bagley and J. A. H. Keith [59, pp. 224–25], that "the emphasis should be upon *rational* mastery rather than upon mechanical mastery, upon *understanding* or *comprehension* rather than upon *memorization*" [53, p. 106]. Her students learned the necessity of clarification and then the role of classification in successfully answering reference questions.

Of all the textbook authors, Hutchins most clearly elaborates the methodological dimension of teaching reference work. While Hutchins recognized the necessity of teaching formats, she was the consummate proceduralist, emphasizing method in reference work. As such, she aligned herself most closely with Wyer and Mudge rather than with Shores. Her textbook enjoyed considerable longevity: a sixth printing appeared in 1959.

*William A. Katz (1969, 1974, 1978, 1982, 1987)*
Katz had little in common with the preceding *Guide* editors and authors of textbooks. For that matter, he was not a student of Mudge or Hutchins; he likes to claim that "I learned everything I know from Cheney,

and a bit from Shores" [60]. With a newspaper background and a disser-
tation on a historical topic completed in the Graduate Library School at
the University of Chicago, Katz nevertheless developed a strong interest
in education for librarianship, especially reference work.[14] Part of his
interest in this topic came from his practical experience. Katz worked
as a reference librarian for the King County (Washington) Library in
the late 1950s "and for a time at the University of Washington Library
as [an undergraduate] student" [60]. He also gained valuable editorial
experience in ALA's editorial department; in fact, his first textbook
acknowledged Pauline J. Love "for doing her best to teach me the rudi-
ments of publishing" [61, 1:viii].

Starting in 1964, he taught reference as an associate professor at the
University of Kentucky's Department of Library Science until he ac-
cepted the call to the State University of New York at Albany as a profes-
sor in 1966, shortly after earning his doctorate [47, p. 357; 33, p. 572;
62, p. 255; 63]. In the late 1960s while serving as editor of *RQ*, Katz
was approached by Frances Cheney to write a reference textbook—"she
had contacts at McGraw-Hill" [60]. Jean Kay Gates, editor of the newly
established McGraw-Hill Series in Library Education, read his manu-
script on reference work. However, the two volume idea belonged to
another editor at McGraw-Hill who "decided two was better than one.
Who was I to argue . . . and it all worked out well enough" [60]. Indeed,
it was excellent timing. Katz could capitalize on burgeoning library
school enrollments in the 1960s and the increased demand for current
textbooks. The delay in issuing a new edition of Shores's textbook
helped Katz capture a major share of the market with his 1969 *Introduc-
tion to Reference Work* [61].

Consciously reflecting two dimensions of reference work, the first vol-
ume treated "basic information sources" while the second covered "ref-
erence services." "Processes" was added to the subtitle of the second
volume in 1974 [64]; however, Katz still focused on formats and types
of questions. He believed that "the neat categorization of reference types
by direction [that is, bibliographies and indexes], and by source [that is,
encyclopedias and dictionaries] is not always as distinctive in an actual
situation" [61, 1:15]. Hence, Hutchins's heuristic appeared after a fash-
ion, but his source for this approach was actually Charles Bunge's 1967
doctoral work [65]. In the 1974 [64] and even in the 1978 [66] edition,
Katz explains reference work from the functional analysis perspective
strongly reminiscent of W. W. Charters and James I. Wyer. He admits
to strong admiration of Wyer but also includes Hutchins, "particularly

14. Katz earned his doctorate at the University of Chicago as "Willis Armstrong Katz."

as they are clear thinkers and wrote with style. Style, after all, is everything" [60].

While he believes that one should adopt an analytical approach to the reference process, the analytical process of Mudge and Hutchins was not at all clear in his various editions [64, 1:3; 67; 68]. Katz can be considered both a structuralist (one who emphasizes format) and a functionalist (one who emphasizes activities). Apparently Hutchins's heuristic—classifying the reader's question by type of reference source—had started to slip from the profession's memory as recently as the early 1970s when instructors began to emphasize the clarification process (that is, the reference interview).

*Frances Cheney and Wiley J. Williams (1971, 1980)*

A sociology undergraduate at Vanderbilt University in 1928, Cheney worked in the library and became head of the reference department in 1930. She studied part-time in the Peabody Library School between 1930 and 1934, earning a B.S. in library science. Cheney also studied with Hutchins at Columbia and was awarded her M.S. in June 1940. She continued to serve as head of reference until 1943, when she joined the Library of Congress. After serving there as a bibliographer in the General Reference and Bibliography Division, she returned to Nashville to head the Joint University Library's Reference Department from 1945 to 1946. Peabody appointed her an assistant professor that year. Promoted to associate professor in 1949, she became the school's associate director in 1960 and was promoted to professor in 1967. She retired an emerita professor in 1975 [33, p. 184; 46, p. 81; 47, p. 112; 62, p. 86; 63].[15]

Not unlike Sheehy, Cheney also served an apprenticeship, editing *Wilson Library Bulletin*'s "Current Reference Books" beginning in November 1942, when Shores went into military service. Reflecting upon her 5,800 reviews, it may well be said that she was "the profession's number one reference reviewer" [69].

Echoing Shores's title and orientation, Cheney published *Fundamental Reference Sources* in 1971—a much-awaited basic text on reference work [70]. Along with Winchell's *Guide to Reference Books,* it served as the required text when she taught Peabody's Library Science 220, "Introduction to Bibliography," which she described as the "study of basic types of reference sources with emphasis on bibliography; some attention to reference methods, organization, policies, devices, measurement, citation, and bibliographic form" [71].

15. Cheney also deserves a biographical study, perhaps in a collective biography along with Hutchins; Cheney's papers are held by Vanderbilt University Library's Special Collections Department.

In her textbook, "sources of bibliographic information are discussed first because they are used in selecting, acquiring, organizing, and re-trieving the body of recorded knowledge" [72, p. 12]. In this respect the textbook follows the tradition established by editors of the *Guide to Reference Books*. When asked why she omitted other elements of refer-ence work, notably the method, she responded: "because the title is *Fundamental* reference sources" [73].

Despite its traditional emphasis on a single dimension of reference work—the materials—readers demanded a new edition, and her col-league at Peabody, Wiley J. Williams, joined her as coauthor for the 1980 edition, which followed the same organizational pattern [74]. A new edition is underway, which will include a chapter on the history of reference work and an additional chapter covering handbooks [75].

*Thomas, Hinckley, and Eisenbach (1981)*
These authors reflect a west coast, uniquely California, experience. Di-ana Thomas holds an M.L.S. and a Ph.D. in librarianship from the University of California, Berkeley. She briefly served as acting reference librarian at Mills College (1971–72) and then joined the faculty of the Graduate School of Library and Information Science at the University of California, Los Angeles (UCLA). Elizabeth Hinckley earned her M.L.S. from UCLA in 1964 and joined the library staff in interlibrary loan (1964–67), then reference librarian (1967–70) and assistant head of reference (1970–73), and she also served as head of reference (1973–91). Ann Eisenbach earned her M.L.S. from UCLA in 1962 and worked as a librarian from 1962 to 1966 until she joined the faculty of UCLA's Graduate School of Library and Information Science as a lec-turer. Appointed a senior lecturer in 1980, she retired in 1987 [33, p. 310; 62, p. 495, 217, 137; 63].[16]

Together these three authors possess six decades of teaching and reference experience. Not surprisingly, then, Edward G. Evans, another UCLA faculty member at the time and consulting editor of Academic Press's Library and Information Science series, suggested that they write a textbook for his series in 1976.[17]

Unlike most earlier textbook authors, they chose not to discuss specific titles at length. In their introduction, the authors stated that "the student

16. Ignoring any theoretical context such as John Dewey's contributions, Eisenbach has expressed her rather reactionary philosophy in an article entitled, "No Case Histories, No Papers, No Texts—Only the Reference Desk, or Learning by Doing" [76].
17. Actually the authors had signed a contract with another professional publisher, but the president dictated content and wanted a separate chapter about online reference [77]. Referring to it as "T.H.E. book" among themselves, they divided topics up (two chapters apiece) by what they each knew best; it took five years to finish, writing every Tuesday and Wednesday evening [78].

must start with a good working knowledge of the reference sources. This must be taught in the classroom and generally forms the core of most reference courses" [79, p. 3]. Although "matching the question to the sources" is discussed in chapter 5, their textbook does not explicitly recommend Hutchins's heuristic—classify the question by type of source and the rules for selecting specific sources.

Thomas gave two reasons for omitting materials: (1) UCLA used extensive format-by-format syllabi in the two-quarter required course, and (2) an emphasis on the tools takes a lifetime [80]. In response to other authors' coverage of titles, she disdained the "scissors and paste book" approach. As for the alternative, she admitted that "it is harder to give students a sense of broader issues" encountered in reference work—"how do you get the soul into reference [if one covers just the titles]?" However, if one wants a list, she offered Enoch Pratt Free Library's *Reference Books*—"my favorite and *vade mecum*" [80].

More than ever (or at least since Wyer's text), *The Effective Reference Librarian (ERL)* shifted students' attention to the interaction between the reference librarian and the person on the other side of the reference desk. Much of the emphasis in *ERL* was on the latter. Previous authors almost never used the term, but the *ERL* authors use the term "patron" eight times in the introduction alone.[18] More frequently, however, they use the word "user" (twelve times); "clientele" is used six times. In later chapters, "inquirer" appears occasionally. When asked if they considered what to call the person on the other side of the reference desk, the third author replied, "Oh yes. Patron is offensive; it suggests patronizing while client seems pretentious" [81].


The Complete Paradigm

Based on an analysis of the preceding six textbooks, a tripartite paradigm for teaching reference work can be seen: (1) the material format or type of reference work; (2) the method or procedural rules for reference question answering; and, (3) the mental traits of the reference librarian as well as the person on the other side of the reference desk. The complete paradigm can be viewed graphically in figure 1. Paradigm, following Kuhnian thought, is a worldview that dictates "model problems and solutions to a community of practitioners" [2, p. viii]. Questions raised as a result are determined to be "interesting" based on

18. Once, on p. ix of the preface and perhaps for alliterative purposes in chap. 5, "Desk Technique and the Library User," they refer to the "problem patron" [79, pp. 128 ff.].
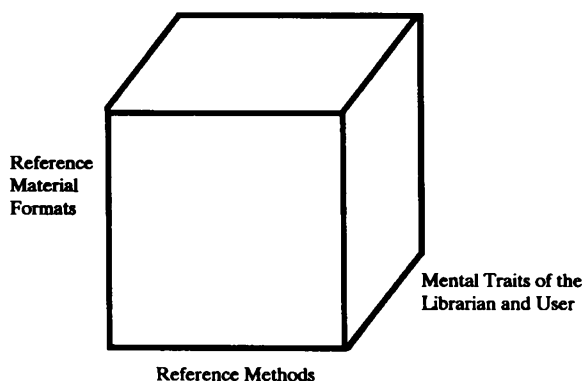
FIG. 1.—The complete paradigm for teaching reference work

the operant paradigm. A complete paradigm for reference work might be said to include each and every dimension mentioned by any of the preceding textbook authors. However, most of the reference textbook authors tend to focus on one or two of the three dimensions identified in figure 1, overemphasizing it. Table 3 identifies the reference textbook authors by school of thought (or paradigmatic emphasis).

Because of the relative emphasis on a specific dimension, three different schools of thought emerge. These are: (1) structuralist, (2) proceduralist, and (3) "psychologicalist," if I may be permitted to coin a term. Briefly, a structuralist is one whose work is based primarily on the achievements realized by focusing on the material format. Members of the procedural school stress method—*how* one answers reference questions. And, the third school concerns itself with the psychological dimension of reference work. Each of these schools will be considered in more detail, by looking at the dimension and the kinds of questions they find interesting, based on the paradigm.

## Material Format; Types of Reference Sources

One essential dimension of the teaching paradigm is the format or type of reference material (see fig. 1). In the earliest years of teaching, say from 1890 to 1930, this element had already been intuitively obvious to a generation or more of reference librarians. Several textbook authors—notably, the *Guide* editors, Shores, and Cheney and Williams—adopted this structural approach to teaching; all are interested in formats, almost to the exclusion of the other dimensions.

As a structuralist, one might ask such questions as What is the best

TABLE 3
TEXTBOOK AUTHORS BY PARADIGMATIC EMPHASIS

| Paradigmatic Emphasis | Textbook Authors |
| --- | --- |
| Structural (material format) | *Guide* editors; Wyer; Shores; Katz (vol. 1); Cheney; Cheney and Williams |
| Procedural (method) | Wyer; Hutchins |
| Psychological (mental traits) | Wyer; Thomas, Hinckley, and Eisenbach |

order to present formats to novice librarians? and Are there some indispensable reference formats? An examination of the six textbooks makes it quite clear that some formats receive much more emphasis than others.

Indeed, among structuralist reference librarians and instructors the intellectual debate rages over the classification and priority of the various formats. For instance, in 1902, Kroeger recognized two categories: "the reference books and bibliographies" [16, p. vii]. Her classification reflects an earlier view that among all the materials at hand "the more copious and extensive bibliographies stand foremost" [82, p. 687]. Even so, she listed dictionaries first in her *Guide*, in part because these were the most useful to the new class of library reader entering libraries at the turn of the century. The earlier type of reader—a scholar—did not often consult a dictionary but did value bibliographies, especially lists of the best works in a field.

The range of and relative attention to formats merit some further examination. By 1954, half a century after Kroeger, Shores could identify nearly 150 different reference types. Whether this large number is really helpful heuristically for the proceduralists is addressed below in the section on the reference method. In any event, these other formats attracted little attention among structuralists, proceduralists, or functionalists; Hutchins covers pamphlets, society and institutional publications are discussed by Shores, and Katz discusses almanacs.

Yet, other obvious formats such as microforms, and more recent technologies including online and CD-ROM sources, received almost no attention. This latter situation may be due to the structuralist's ambivalence about their reference utility, their slowness to recognize the reference potential of these sources, or more stubbornly, their unwillingness to treat seriously a source that does not stand up on the shelf by itself. Instead, two formats, discussed below, have claimed most of the teaching time since the beginning.

*Dictionaries and encyclopedias.*—For decades, many reference librarians and instructors agreed with New York State School Library Inspector

Leon O. Wiswell's 1916 declaration: "By far the most important single general reference work is the English Dictionary" [83, p. 25]. Dictionaries, along with encyclopedias, were two "indispensable reference books," which gave "direct aid" in answering reference questions [16, p. vii].

Dictionaries can also claim primacy because of a logical dependency. One must know how to use a dictionary before anything else. In other words, the new kind of readers entering the library needed to understand the meaning of words before they could use other works in the library's collection. On the other hand, the fact that reference authors introduce their students to dictionaries first also appears pedagogically sound in that this format is already familiar; almost every student owns at least one dictionary.

Sheehy and Mudge agreed on the close relationship between the dictionary and encyclopedia. Sheehy distinguished between the two by noting that "theoretically, the dictionary is concerned only with the word, not with the thing represented by the word, differing in this respect from the encyclopedia which gives information primarily about the thing" [37, p. 146].

For the structuralist reference textbook author, the encyclopedia seems to have reigned as the supreme format for a long time. Mudge went so far as to refer to encyclopedias as "the backbone of a reference collection" [45, p. 376]. As late as 1969, Katz still argued that "encyclopedias are the most used single source" [61, 1:13].

*Bibliographies/catalogs and indexes/abstracting services.*—Despite the common practice of treating dictionaries first and then encyclopedias, an extraordinary shift away from dictionaries occurred in the mid-1940s with the appearance of Hutchins's textbook. Hutchins, a proceduralist, already leading a revolution in one dimension of the paradigm (discussed below), shifts the relative order of formats as well. She had become aware that a complex structure for bibliographical control had emerged in the second quarter of the twentieth century; hence, specific reference tools for the control of and access to information had become more significant for reference librarians and their service population. Bibliographies, as noted, had always been important guides for scholars. Now, however, scholars could access the universal library collection with the appearance of such tools as, for example, the *National Union Catalog*. In 1969, Katz observed that such bibliographies are vital "bridges to information" [61, p. 33].

Increasingly sophisticated reference titles began to appear in these two categories. With more comprehensive, but complex, bibliographies and indexes, it became easier for the reference librarian to answer such questions as, Does this title or article exist; who published it or where did it first appear? Cheney, another structuralist, covers bibliography

first because, as she says, "I happen to believe they are the bedrock of reference sources. They are usually less well known to the average l.s. student than dictionaries and they put the fear of God in the beginner" [73].

After the Second World War, the growth of knowledge and its dissemination through serial literature rather than through monographs created another shift; Katz began to emphasize indexes. The H. W. Wilson Company, which brought serials under increasing bibliographical control, led some reference librarians to refer to this period as the "Golden Age of Indexing." Later, citation indexes from the Institute for Scientific Information also found a more prominent place in reference textbooks.

The increasing primacy of bibliographies, catalogs, and indexes over dictionaries and encyclopedias suggests that the debate about order may continue among structuralists. As for the best order, at least two reference textbook authors have explicitly responded to the concern. Shores thought that "there is no reason why a different order should not be adopted" [61, pp. v–vi] for presenting such material to novice reference librarians; Cheney has said "about *order*. Any one is O.K. if you can defend it" [73].

Reference textbook authors have observed that certain formats contain the direct answer to the question while others, such as bibliographies, can require two steps to get to the ultimate source for the answer. Unfortunately, the field has not provided any strong research basis for the proper ordering except on the basis of use (see further discussion below). Even this definition of "best" has its difficulties. For instance, the reference librarian may not be using the best source, just the source they happen to own in that particular library.

Finally, many teachers of traditional reference classes can claim in defense of their sole focus on the formats and subsidiary titles: "But we have time only to teach reference books" [58, p. 101].[19] From a proceduralist viewpoint, however, the structural approach is an incomplete analysis of how one actually answers reference questions. Sources are ordered by format because it simplifies the decision-making process. One needs to know the different formats and their functions, but that is not enough for a proceduralist.

*Method*
Process or method is the second dimension of the paradigm. Simply stated, the proceduralist believes that the reference librarian should clas-

19. Edward Shils has written thoughtfully about the "grip of the past [and] the endurance of past practices" in *Tradition* [84].

sify the question by type of source (that is, format), and then select a specific source within that format to answer the question. Mudge taught this technique to her classes, and her disciple, Hutchins, published it in the literature in 1937 and again in 1944. Interestingly, Hutchins is the sole textbook author to emphasize this process, though Wyer does cover it.

The proceduralist's response to the structuralist's approach is that there are too many titles for instructors to teach or for students to examine firsthand. Furthermore, as recently as 1979, there was still no consensus about the core reference titles to cover in class [85].

The proceduralist believes that an analytical approach must be taken to the formats. Because reference questions can be answered by using a variety of different formats, more time must be spent on the procedural rules for when to select a particular format. Of course, by identifying 147 types of reference materials, Shores did not really help here; and besides, textbook authors have only discussed at length as many as fourteen and as few as eight formats. Total agreement on the absolutely essential formats exists for only two: bibliographies and, oddly enough, atlases. In addition, all but one textbook author would include dictionaries, encyclopedias, and indexes as essential. A structuralist would not spend much time talking about the importance of formats, their distinctions, or their similarities; the titles are what is important to them.

From the proceduralist viewpoint, the novice reference librarian is still faced with a variety of choices concerning which format to use. And the novice must next choose from among many specific sources to arrive at the correct "tool of choice." Parenthetically, if the librarian already knows the correct title, then there is no decision necessary; so, learning specific titles has validity from either perspective. Without a doubt, however, the proceduralist school views the reference decision as a complex multiple choice classification task.

Historically, Samuel Swett Green may be credited with originally stating the reference professional's "trick of the trade" (also known as a rule of thumb or heuristic), if he meant that the novice librarian should practice analyzing the reference question by form and then find a specific source from memory when he referred to the "habit of mental classification" [86, p. 77].[20] Nevertheless, only one textbook author, Margaret Hutchins, explicitly states this fundamental theory of how to an-

20. The context is: "But having acquired a definite notion of the object concerning which information is desired, the habit of mental classification, comes to his aid. He sees at once in what department of knowledge the description sought for may be found, and brings to the inquirer an authoritative treatise in this department." For a different view of his "mental classification," see [87].

swer reference questions. Because Hutchins learned it from Mudge who taught her students this element as part of her tripartite approach to reference work at Columbia [29, p. 378], it may most properly be referred alliteratively to as Mudge's method or Hutchins's heuristic.[21] In any event, none of the reference textbook authors explicitly discuss this dimension of the paradigm.

Larsen's 1979 examination of classroom instruction would suggest a similar neglect [85]. Somehow the reason for emphasizing a procedural approach by format rather than specific titles has slipped from the profession's memory. Writers such as Bonk have argued that the procedural approach is more important than specific titles [88, 89]. Similarly, Leontine Carroll has called for "emphasizing types rather than titles [because it] would be less time consuming and thereby permit more time for a greater emphasis on problems and solutions" [90, p. 30]. Mudge and Hutchins stress format because it is the underlying basis for how one does reference: answer questions, even questions the librarian has never heard before. As mentioned earlier, the general strategy is analysis by format, followed by the specific strategy of selecting a tool of choice from within that format. For a proceduralist, classroom instruction emphasizes the "rules of reference"—the various formats, their similarities, their differences, and when one should use one format over another—and only then the rules that lead to specific tools. Granted, however, this approach requires reference instructors to become more analytical in their approach and that is more work.

### Mental Traits; the Librarian and the Person on the Other Side

There is a third component of the complete paradigm, one which also can be viewed as a separate school of thought: a focus on the mental traits of the reference librarian and of the person on the other side of the reference desk. In his psychological approach to reference work, Wyer presented the twenty-seven necessary mental traits or "personal qualifications deemed [to be] of first importance in reference work" [43, p. 233]. Table 4 lists the important mental traits of reference librarians as identified by the textbook authors. The traits were developed for the Library Curriculum Study of the American Library Association [43, p. 234; 42].

With few exceptions, subsequent textbook authors ignore the list as well as the concept. Teaching solely the tools was satisfactory for them, until the growth of reference sources made the structuralist approach inefficient. When the *Guide to Reference Books* contained less than two

21. Kraus labels Mudge's three M's (material, method, and mind), "a glib prescription" [30, p. 289].

TABLE 4
IMPORTANT MENTAL TRAITS OF REFERENCE LIBRARIANS

| Mental Traits | Wyer | Hutchins | Thomas, Hinckley, and Eisenbach | Katz, 4th ed. |
|---|---|---|---|---|
| Intelligence | 1st | . . . | 2d | . . . |
| Accuracy | 2d | 5th | . . . | . . . |
| Judgment | 3d | 4th | . . . | 2d |
| Professional knowledge | 4th | . . . | 16th | 1st |
| Dependable | 5th | . . . | . . . | . . . |
| Courtesy | 6th | . . . | . . . | . . . |
| Resourceful | 7th | . . . | . . . | . . . |
| Tact | 8th | . . . | 1st | . . . |
| Alertness | 9th | . . . | . . . | . . . |
| Interest in work | 10th | . . . | . . . | . . . |
| Memory | 11th | 1st | 13th | . . . |
| Mental curiosity | 12th | . . . | 7th | . . . |
| Interest in people | 13th | . . . | . . . | . . . |
| Imagination | 14th | 2d | 3d | 4th |
| Adaptability | 15th | . . . | . . . | . . . |
| Perseverance | 16th | 3d | 8th | 5th |
| Pleasantness | 17th | . . . | 11th | . . . |
| Cooperativeness | 18th | . . . | . . . | . . . |
| System | 19th | . . . | . . . | . . . |
| Health | 20th | . . . | . . . | . . . |
| Initiative | 21st | . . . | . . . | . . . |
| Industriousness | 22d | . . . | . . . | . . . |
| Speed | 23d | . . . | 14th | 3d |
| Poise | 24th | . . . | 12th | . . . |
| Patience | 25th | . . . | . . . | . . . |
| Forcefulness | 26th | . . . | . . . | . . . |
| Neatness | 27th | . . . | . . . | . . . |
| Suitability to reader | . . . | 6th | . . . | . . . |
| Ingenious | . . . | . . . | 4th | . . . |
| Helpful | . . . | . . . | 5th | . . . |
| Empathetic | . . . | . . . | 6th | . . . |
| Energetic | . . . | . . . | 9th | . . . |
| Sensitive | . . . | . . . | 10th | . . . |
| Humor | . . . | . . . | 15th | . . . |

thousand titles, librarians could usually remember the right source. However, by the time Hutchins's textbook appeared, the *Guide* had grown to nearly four thousand sources. Not surprisingly, Hutchins then mentioned Wyer's list in her section on reference staff member selection [58, p. 161] and delineated her six most important characteristics in the section on qualities needed for success [58, pp. 32–34]. Katz, who seems to have flirted with the psychologicalist approach in his 1982 edition,

chose to mention five of the Wyer characteristics in his introductory
subsection entitled "The Reference Librarian" [67, 2:28]. And, as might
be expected, *The Effective Reference Librarian* discussed fifteen traits [79,
pp. 1–3] possessed by good reference librarians, many of which are
from Wyer's list.[22] The six most important traits are: (1) imagination,
(2) judgment, (3) professional knowledge, (4) memory, (5) perseverance,
and (6) speed.

The psychological school of thought also recognizes and describes
traits held by the person on the other side of the desk. In other words,
the textbooks use a psychological approach that is based on the user's
questions and then teach those titles that contain the answer. Thus the
psychologicalists hope to find a more efficient way to teach reference
work by focusing on that person on the other side of the desk.

Every textbook author seems to have spent some time thinking about
what to call that person. The word or term used shows a subtle, but
significant, semantic shift over time. Indeed, the aesthetics of language
can reveal one's philosophical orientation to reference service. Four
terms have been used to identify or describe the person: (*a*) patron,
(*b*) reader or inquirer, (*c*) user, and (*d*) customer or client.

*Patron.*—Despite colloquial references to "patrons" in library school
hallways and even in lectures, reference textbook authors have consis-
tently avoided this term, with few exceptions. Their disdain for refer-
ring to the person as a patron is manifold. First, the authors do not wish
to be patronizing. Second, the term seems to be offensive to some au-
thors [81]. More important, though, the term suggests an undesirable
psychological situation—a vertical relationship between the reference
librarian and the person. Such a philosophical orientation even mani-
fests itself architecturally in libraries, by having the person stand while
the reference librarian sits.

*Reader/inquirer.*—Reference textbook authors, from Wyer to the pres-
ent, have consistently used the word, "reader," meaning "one engaged
in research or study," to describe the person on the other side of the
reference desk. Of those terms available, this word most accurately de-
scribes the activity or the person's purpose for being in the library and
making use of reference service. Among the various authors, though,
Thomas, Hinckley, and Eisenbach demonstrate the most ambivalence
using this term. The reason becomes clear upon examination of the
next term.

22. While several of their traits sound like societal expectations of "the woman next door,"
    one of their traits—helpful—is in fact straight out of the Scouting Movement's Law;
    see "Boy Scouts" [91] and "Girl Scouts and Girl Guides" [92].

*User.*—A strong paradigmatic shift or revolution occurred in this ele-
ment of the teaching paradigm in 1971. Although Kroeger uses the
phrase "users of libraries" [16, p. vii] and, similarly, Wyer refers in
passing to the "library user" [43, p. 5], the term is not used in a textbook
until Cheney's *Fundamental Reference Sources* (1971). The word is hope-
lessly vague and inaccurate; yet, it suggests the using of books versus the
ability to take time to read books. It also suggests the risk of substituting
knowledge for wisdom and mere information for knowledge.

   The growth of knowledge and the subsequent shift from dictionaries
and encyclopedias to bibliographies and indexes may account for this
shift from reader to user. In the 1960s and earlier, the person on the
other side of the desk probably did have time to read, but the so-called
information explosion has some basis in reality. Sometimes there is too
much data but never enough relevant information. Starting in the
1970s, reference textbook authors reflected this new reality by adopting
the term "users."

*Customer/client.*—Obviously, one's terminology can be revealing. As
noted earlier, "patron" may suggest an unwise vertical relationship, just
as some will object that customer or client implies some sort of business
connotation. Thomas, Hinckley, and Eisenbach used this term. Al-
though there is today no consensus, such terms as customer or client
may not be unrealistic, especially with the appearance of profit centers
in public libraries and the growing demand for high quality reference
service. Obviously one could add a plethora of possible alternatives, all
of which will have negative and positive connotations depending on
context and intent. What is clear is that the term shifted from reader
to user in Cheney's 1971 textbook, and perhaps there is another shift
underway, led by the psychologicalists, to client or customer.


Conclusions

As stated above, the complete paradigm for teaching and learning gen-
eral reference work identified by Mudge consists of: (1) the reference
material's format; (2) the reference method of clarification and classifi-
cation; and (3) the mental traits of the librarian as well as the person on
the other side of the desk. Each of these dimensions also represents a
school of thought.

   A couple of revolutions have occurred over time. First, the paradigm
has undergone a shift from formats to method and back again. Within
the dimension of format, the emphasis has shifted from dictionaries and
encyclopedias to bibliographies, catalogs, and indexes. The methodolog-

ical dimension has been overshadowed by an emphasis on the other two dimensions while the third and final element, mental traits, has experienced a semantic shift from reader to user, and soon it may shift to customer or client.

## Material Format

Structuralists concern themselves with lists of specific reference titles, whether it is the number of vital reference titles in the next *Guide to Reference Books* or each school's individual sampling of recommended reference tools. Instead, structuralist reference textbook authors and instructors might consider articulating the principles or "rules of reference" within a particular format. Rereading Hutchins would be useful. In the meantime, research needs to be undertaken to elucidate the conditions under which certain types of reference material formats are useful. Some of the prototype expert systems work that has been done in general reference promises to identify the essential or core titles.

## Method

The Mudge method or Hutchins heuristic of classifying the inquirer's question first by format and then by specific source is another component to successful reference work. Perhaps researchers could treat this principle as a hypothesis and test it. Otherwise, it is an untested assumption that a question can best (that is, most efficiently) be answered by connecting it to the format first and then to the specific title. Proceduralists could extend the Hutchins heuristic by elucidating the procedural rules for when to select a specific type of source (that is, What are the characteristics of the basic formats? How are they unique or how do they overlap?) and the declarative rules for when to select a specific title (that is, Why are certain sources the "tools of choice"?).

## Mental Traits

Despite evidence [93] that interest has shifted to one dimension of the complete paradigm (namely, increased interest about the person on the other side of the desk), most of the reference textbooks ignore the substantial research into the psychological dimension of reference. Such work could be incorporated into future editions of the reference textbooks. What researchers have learned from studies of online public access catalogs may also be relevant to users of printed catalogs and bibliographies.

In conclusion, despite the *Guide's* being edited at Columbia, the School of Library Service there lost its teaching influence in this field. That influence shifted to the State University of New York, Albany, where Katz continues to offer a traditional, structural approach to reference

work. Strongly influenced by the Columbia connection, the next edition of Cheney and Williams is also likely to offer the same kind of approach. If a new edition of the *ERL* were to appear, it would probably continue to offer the necessary psychological perspective.

The point is that a complete, balanced perspective is possible: (1) a presentation of the structure of reference works; (2) the process of answering reference questions by clarification and classification; and (3) a psychological understanding of the interaction between librarian and user. Perhaps only then will the field have reference librarians trained, educated, and capable of rendering high quality reference service.

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