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The goal of this paper is to present a historical literature review and analysis of archival reference literature in order to identify what, if any, assumptions the literature suggests that archivists hold, and have held in the past, about users. In order to determine implicit as well as explicit attitudes about users, attention has been focused on words used to refer to users as well as words used to describe users and their uses of archival materials. The paper focuses on North America archival literature from 1938 to 2009. This analysis is an attempt to raise awareness of assumptions archivists have or have had about users in order to facilitate assessment of reference policies and services.

Headings:

Reference services—Archives

Archives—Reference

Archives—Users

Reference archivists

ANALYZING HOW REFERENCE ARCHIVISTS WRITE ABOUT USERS: A
HISTORICAL REVIEW OF THE LITERATURE IN NORTH AMERICA

by
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Approved by

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INTRODUCTION

The goal of this paper is to present a historical literature review and analysis of archival reference literature in order to identify what, if any, assumptions the literature suggests that archivists hold, and have held in the past, about users. In order to determine implicit as well as explicit attitudes about users, attention has been focused on words used to refer to users as well as words used to describe users and their uses of archival materials. The focus for this paper is the United States, although some literature from Canada is included.

It is hoped that this paper will assist archivists as they engage in user studies; understanding past attitudes and lingering assumptions can help to target where research and examination is needed. This paper is preliminary and includes suggestions for further research in the conclusion. While the goal is to be representative of the archival reference literature, the paper is not exhaustive. It is important that archivists engage with users based on data and plan and implement services based on data rather than anecdotal or intuitive knowledge. A firmer understanding of users and uses of archives will enable archivists to provide more effective services to the broadest range of users possible. Having solid data about users can also assist archivists beyond the immediate reference interaction—resource allocators, donors, records creators, and policy-making bodies can be more effectively influenced in favor of archival repositories when archivists have data, rather than intuition, about their users to show levels of use and needs for resources.

LITERATURE REVIEW

The archival literature on reference services falls into three related categories of emphasis: users, education and training, and commentary on the literature itself. In the interests of clarity, these three emphases will be addressed individually here. The majority of the literature under review here comes from *The American Archivist*, published by the Society of American Archivists since 1938. Using the searches detailed in this paper's Methodology, articles were identified as related to reference services or archival services. In addition to those articles originally identified, footnotes were scanned for overlooked materials.

State of the Literature

For at least the last 27 years archivists have lamented the lack of literature on reference services in archival settings. Before beginning to analyze how archivists describe users in relation to reference, it is important to recognize that reference has been perceived by archivists as under-studied and under-represented in the professional literature. In 1983 Richard Cox remarked on the "poor condition of the study of American archival history" (31) in general. His contention that "[t]he study of our professional past will enable a clear focus on the proper professional priorities" (41) is echoed in the literature on archival reference topics. Ruth (1988) suggested that "recent literature" on archival education was "like previous writings….[and paid] little attention to reference service" (267). By 1989 Linda Long asserted that "to date, professional archivists have written more about the peculiarities of the archival arrangement of records…than about the interpersonal exchange that takes place between patron and archivist" (41). Often concern about the lack of literature is tied to concerns about the

lack of education in reference, as evidenced in Duncan's (1990) comment that while "[t]he reference archivist is the public face of the archives" (213) there is "little…written on archival reference services or methods of teaching reference skills" (215). Archival reference training and service overall are impacted by the "dearth of research" (2) and "numerous gaps" (2) in the literature still seen by Cox in 1992. Even after almost three decades of articles pointing out the lack of focus on reference topics, archivists in the 2000s continued to state that "the literature on archival reference is sparse" (O'Donnell 110) and that this was not a recent trend. O'Donnell's literature review shows that the *American Archivist*'s first 12 volumes "did not include the term reference in the titles of any of the articles" (110). Similarly, she noted the continued scarcity until the mid-1980s (110). As digital technologies began to change reference services in libraries, more literature in the archival field addressed the possibilities of digital archival reference. However, Salzmann still noted that in 2004 "much less research exist[ed] on the topic" (45) of remote reference in archives than on the same topic in libraries. Finally, in 2006, Duff and Fox were still echoing the sentiment that archival reference has gaps by pointing out that their article on archival reference from the view of archivists has been "an area traditionally neglected within archival reference literature" (129).

While archivists are obviously concerned about the lack of literature on reference topics it is interesting to note that as the amount of literature on reference increases, authors still include concerns about the lack of reference literature in their articles. This perceived gap suggests that archivists may be concerned about reference services, but they have not yet pursued (or at least published) research to fill the void. When writing about the lack of attention on reference in the literature, archivists also write about the

state of archival education. The two issues (lack of reference focus and education) are seen as related insofar as a lack of training in reference is seen to result in a need for on-the-job training. This on-the-job training leaves less time for archivists less time to pursue research studies on reference services. Thus, articles about reference frequently mention archival education and articles on archival education sometimes mention reference as a particular point of concern for archival education programs.

Archival Reference and Education

As early as 1938 articles on archival training appeared in *The American Archivist*, indicating that the new Society of American Archivists was concerned about how and to what extent to train archivists. Bemis (1938) felt American archival training should follow European examples, leading to archivists trained as historians; unfortunately, he failed to include public service or reference service when discussing archival skills. Thirty years later, Kahn was "worried" (6) that "[t]here doesn't seem to be much training given in reference service and research advice" (6) which he saw as "the end purpose of all archival work" (6). In those 30 years, archival education and training continued to be debated in journal articles, but there was little mention of training reference archivists in the professional literature. It was not until seven years after Kahn's article that SAA published Sue Holbert's *Archives & Manuscripts: Reference and Access* manual. Brauer (1980) rightly pointed out that this was the first instance of "standards for archival reference service" appearing from the SAA. Unfortunately, Brauer also stated that he rarely "encountered reference archivists who consistently met SAA's high standards" (77); he suggested that archivists use archives more, since "[n]othing could better teach archivists about reference services than to make them consumers of such services" (79).

Brauer's statements highlight a recurrent theme in this segment of the literature: the debate over educational training vs. on-the-job training. Jacobsen (1981), writing with a view toward improving the service toward genealogists, suggested that archivists needed to "re-educate" (341) themselves before they could turn to the task of educating users. Ruth's focused treatment concluded with suggestions for study and advocated more formal education in reference services (1988). Disappointingly, nearly ten years after Ruth's article Malbin (1997) indicated that reference training was still not being addressed by the archival community. Her call to action was simple and direct: "[t]he research agendas Ruth described must now be executed" (77). Duncan (1990) similarly argued in favor of best practices and communication skills as part of archival training. In a review of Mary Jo Pugh's 2005 reference manual, Cliff (2006) still noted that "public relations may be touched upon in an archival program, but is usually not emphasized" (163). Some of these authors were primarily concerned with archival education, while others were more focused on reference in practice. For all of these authors, there was a current of concern flowing through the literature that has not abated. After 72 years of the SAA, archivists are still expressing concerns in their journal publications about the overall state of archival education and reference service education is now becoming a focus in the literature..

Users and User Studies

A final recurrent theme in the archival literature on reference services is the role of users and user studies in archival settings. As early as 1939, McCain was concerned about identifying the variety of user groups in archival settings. Schiller (1948) continued this theme by emphasizing service over simply "hous[ing] the records safely"

(230). Cappon's 1951 discussion of the archival profession dwelled on the concept of use and posed questions that are still being considered now. He stated, for example, that the question "'For use by whom?' is a pertinent question" (198); it is still pertinent and based on the literature reviewed here, still considered understudied. Also writing in the 1950s, Schellenberg supported the axiom that "serving the needs of scholars and other users" (56) is "the function of an archival institution" (56). Evans and Richards, both contributing to the 1962 volume of the *American Archivist* echoed McCain's early consideration of the different users of archives. Evans explored the relationship between the archivist and the academic user while Richards examined the 'amateur researcher' and the archivist. Less was written explicitly about users and reference services in the 1970s, but the 1980s saw an upswing in the number of articles published and the number of user studies conducted. In contrast to the earlier literature in reference, which was interested in users to some degree, but was also focused on training and educating reference (and other) archivists, the user became the focus of literature written in and after the 1980s. Well-known writers Pugh, Cox, Freeman, and Jimerson, along with other writers began a dialogue that continues. They examined the role of user studies in archival settings and called for more such studies (Pugh 1982; Cox 1983; Freeman 1984; Beam 1984; Long 1989). Archivists also began to report on their own findings and addressing the attitudes of archivists toward users, which I will examine in more depth in this paper. In the post-1980s archival literature there is a consistent and on-going theme of studying and engaging users. The literature takes the form of reports of user studies, literature reviews, and continued calls for more such research, along with strengthening ties with librarians and learning from their body of user study research.

In addition to this body of journal literature, the SAA has published three manuals on reference services. The first appeared in 1977 and was followed by another in 1992. The 1992 manual was published in a second edition in 2005. Along with the literature reviewed above, these three manuals are the main texts under consideration in this paper. They represent the direct efforts of SAA to educate and inform archivists of standards and best practices for reference work in archival institutions. Finally, two volumes of *The Reference Librarian* are analyzed as distinct from the manuals and other journal literature, as they are also direct efforts from the archival profession to inform and/or train other archivists about reference services. These volumes appeared in 1985 and 1997. To date there is no archival journal specifically devoted to reference or other public services.

METHODOLOGY

The main research question under consideration in this paper is the representation of users in archival literature focusing on reference services in archival settings. In order to approach a fuller understanding of reference services in archival settings, it is important to understand the history of those services. As part of that history, the representations of users is important since users (past, present, and potential) are the key targets for reference services. In addition to examining how reference processes are written about, it is important to know if the literature indicates attitudes about users that might be of interest to archivists as they strive to meet the high standards for access and services of the SAA. The goal of this study is to begin to lay the groundwork for methods of assessment of reference services that consider the impact of archivists' representations of uses and users on reference policies and services.

The basis for understanding representations of uses and users in the literature in this study is textual analysis. Terminology applied to users is considered along with characterizations of users and users of archival materials. Terminology and characterizations are considered historically and trends are identified. The focus of the textual analysis is on word choice for users (inclusive terms versus exclusive terms), gender of word choice for users, and variety of word choice for users.

The scope of this study is North American literature about reference services in archival settings in the United States published[1] in English between 1937 and 2010. The majority of the literature is by American authors, though Canadian authors who were frequently cited in the American literature are also included. In addition, studies that included the United States and another country are included. For this study, one article is a study comparing American and British archival reference. The other mixed studies included American and Canadian repositories.

Books and Manuals

To identify manuals or guidebooks on reference services in archives, I searched the UNC-Chapel Hill library catalog. Search terms included "archival reference," "reference archivist/s," and "Society of American Archivists." I also searched the SAA site directly and determined that three manuals existed: Holbert's 1977 manual and Pugh's 1992 and 2005 manuals.

Journal Literature—Individual Journals

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[1] . One article (Barth, Christopher D. "Archivists, genealogists, access, and automation: past and present trends in archival access technologies and their implications for the future of genealogical research in archives." (1997)) does not appear to have been published in the normal sense. It appears as a website; however, the site is organized as a research paper and the paper is cited in the SAA glossary of archival terminology as well as by authors analyzed in this paper. For these reasons (relevance and impact) the article was included in this paper.

In addition to the books and manuals identified above, particular journals were identified as sources of relevant materials on providing archival reference services. *The American Archivist* and *Archivaria* are the primary sources for archival articles with a focus on the United States and/or North America. Both are indexed in the databases identified below and figure heavily in the relevant results identified through the database searches. In addition to database searches, issues were browsed when retrieving identified articles. Finally, in addition to these journals, two issues of *The Reference Librarian* were identified as special issues focused on archival materials and institutions. These volumes appeared in 1985 and 1997. The journal was also searched online via the UNC-Chapel Hill Libraries, resulting in four additional relevant articles. The online search of *The Reference Librarian* covered the years 1997-2010, limiting the additional results identified to more recent articles.

Journal Literature—Databases

The journal literature is important in order to get a wider picture of the place of reference services in the archival literature. In order to identify articles that discuss reference services in archives, multiple databases were searched and their results compared. The data collected on the journal literature indicates the amount of attention paid to reference services and contextualizes the three official reference manual publications.

The first step in identifying journal articles was selecting databases. Working within the Triangle Research Library Network (TRLN) five databases were identified as likely to have articles related to archival practice: Library, information science & technology abstracts (LISTA), Library and Information Science Abstracts (LISA),

Library Literature and Information Science, Library Literature and Information Science

Retrospective, and Education Resources Information Center (ERIC). LISTA, LISA, and

ERIC were accessed through North Carolina State University (NCSU) Libraries. Library

Lit and Library Lit Retrospective were accessed through UNC-Chapel Hill Libraries.

Overlap was expected between various databases; the Library Lit Retrospective was the

only database that specifically covered dates back to the founding of the Society of

American Archivists (SAA) and was included to ensure that the historical focus of the

paper was upheld.

Once databases were identified, search terms were created. A previous search of

the literature offered some terms; these were expanded to include variations and an

expanded focus from reference to the profession as a whole. This expansion was pursued

in order to avoid myopic analyses of the archival profession; reference services may not

be the sole focus of an article but the article may include a sustained (a full paragraph or

more) discussion of reference services or users. In cases where such articles were

identified, they were included, even though the main topic of the article was not reference

services. This was more likely to occur in older literature. Since older articles also

tended to use the term "reference" less often, this expansion of search terms to include

the wider archival field was doubly beneficial. The search terms chosen range from the

specific topic of archival reference and reference archivists to the broader field of

archival services and the archival profession. The terms chosen are listed in Table 1.

Summary of Search Terms

"archive service" "archive services" "archival service" "archival services" "archives service" "archives services"	"archive history" "archives history" "archival history"	"archive profession" "archival profession" "archives profession"	"archival practice"	"archive reference" "archives reference" "archival reference" "reference archivist"

Table 1: Database search terms used to identify articles, arranged to show term variations

Terms were chosen with variations such as plurals in mind, but preliminary searches determined that some plural variations returned few or no unique results. For the purposes of comparison, these null results are included in my tables of results, included as Appendix A. In order to keep the results relevant to this study, raw results were refined to English-only articles. They were then further refined to include those articles dealing with the United States; as stated above, however, some Canadian authors were included because citation patterns suggested that they had a significant impact on the archival literature in the United States.[2] Finally, the remaining results were browsed

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[2]. Wendy Duff and Terry Eastwood are the two prominent Canadian authors included in this study.

to compile a list of articles for review; that is, this initial list consisted of articles with a high probability of relevance, based on the title, subject headings, and abstract.

Relevance was based on whether or not the focus of the article was on reference services or users. If the topic was not mainly reference-focused, the article was browsed to determine if a significant (a full paragraph or more) section related to reference services or users. In addition to the title of the article, subject headings and abstracts were scanned to determine the topic of an article. Additionally, articles that were identified through citations were determined to be relevant if they were cited more than once or if the article citing it was cited more than once. Finally, it is important to note that the focus of the article is the main determining factor of relevance. The focus of this study does not include those studies that use archival materials to write history. This is a necessary distinction to make since searching for "history" and "archive/s/al" leads to a large number of articles describing the use of materials to write histories. These studies are outside of the scope of this study because they are interested in the products of research rather than the processes of research or the users of archival materials.

After scanning of articles and footnote chaining, a final list of 100 sources was compiled, encompassing journal literature and book chapters. Once articles were identified, they were read to identify terms used to describe users and uses of archival materials. These terms formed the basis of the textual analysis detailed in the discussion section of this paper. Trends in assumptions were identified and treated individually.

Limitations

One limitation of this search is the variety inherent in the databases consulted. Of the five, only LISA offers the option to limit by language. Primary language was thus determined by scanning and tallying initial results lists. A primary language was identified usually through a document's title; in some instances, the full citation listed an article's language as something other than English, even though the title was in English. In all databases, limiting by geography possibly eliminated relevant results. Citations did not necessarily list a geographical region or term and so limiting by the term "United States" (or US or America, etc.) opened the possibility of omissions. Initial results lists were scanned to mitigate against this possibility. Relevant results tended to appear in multiple databases, suggesting that omissions of highly relevant articles were infrequent. In some cases, a relevant article appeared in only one database. In other cases, relevant results did not appear in the database searches and were identified through citations in other articles. Another limitation of the study is the overlap in specialized vocabulary between archival services and historical research. Searching for "archival history" and "archives history" returned a large number of results in both LISTA and LISA. However, looking at the refined results for this term shows that in both databases, the number of results relevant to this paper is very small (2 in LISTA and 1 in LISA). Scanning the results reveals that historians (and archivists) use the terms to mean histories that draw on archival materials; this term was included here in the hope of finding results on the history of archives or archive services. When including the terms "archive," "archives," or "archival" with "history" it was prudent to scan results repeatedly (at each level of refinement) in order to identify those articles that relate to this study. Given the

limitations of scope and time on these database searches, the resulting list of relevant articles is encouraging in its coverage.

A final limitation to this study is the factor of time. Every article that mentions or references reference services cannot be included. Part of the process of selection was a comparison between databases to identify overlap; articles that appeared in many databases or under multiple search terms were considered more relevant for this study than outliers that appeared in a single database or under fewer search terms. This is not to suggest that those articles are unimportant, but rather that they may not have been as widely influential as articles that appeared in numerous databases or numerous footnotes.

RESULTS

JOURNAL LITERATURE

Analysis of the journal literature yielded eighteen terms that were used generically by authors to refer to archival users. Of these, only two were used only once. Some terms were identified prior to reviewing the literature ("user," "patron," "researcher," "visitor," "scholar," and "historian"). The others were identified through reading and charted. Figure 1 summarizes the overall trend of terms used.

Terms used for archival users in 100 articles published 1938-2009
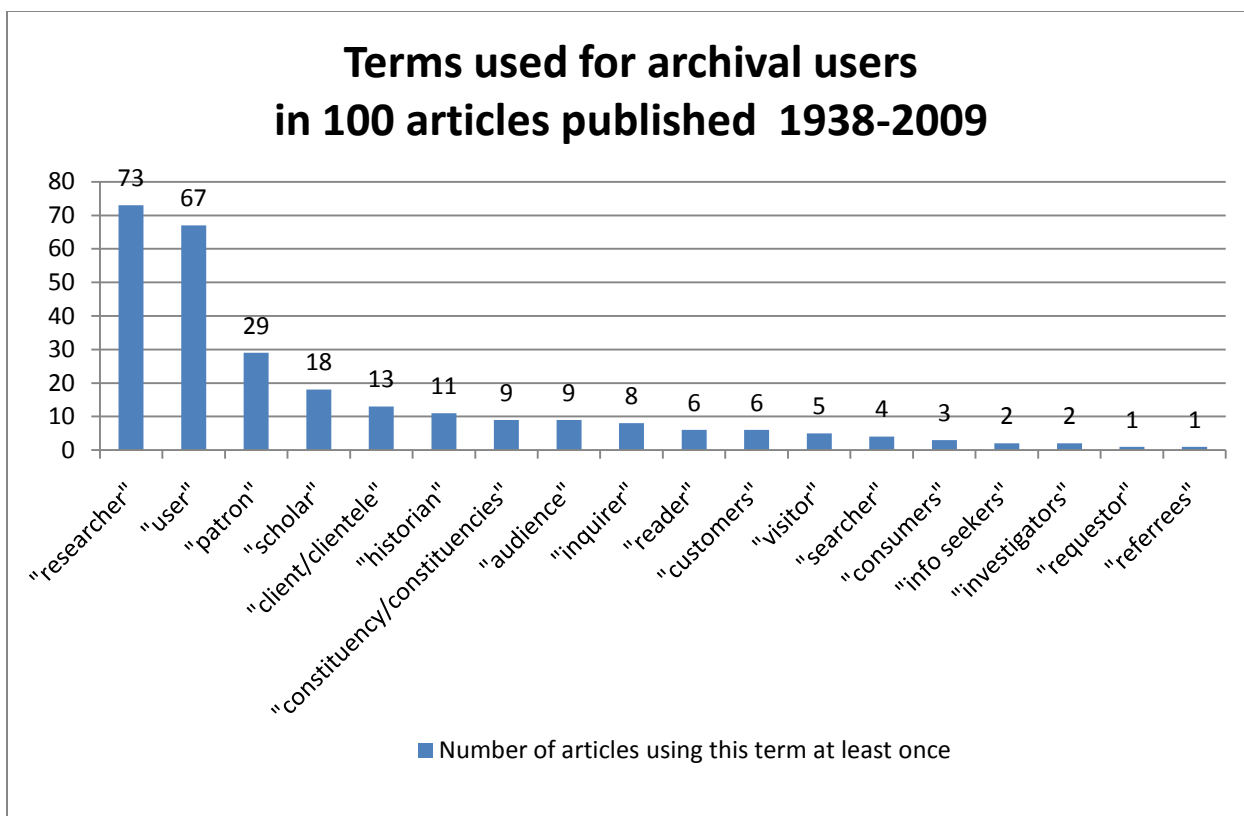
Figure 1: Terms used for users, arranged by frequency. Numbers correspond to the number of articles using a term at least once.

The chart is arranged to clearly show that that more general and inclusive terms such as "user" and "researcher" are clearly preferred over specific and exclusive terms such as "historian" or "scholar." It is important to note, however, that while "user," "researcher," and "patron" were favored over "scholar," "scholar" was still more widely used than many other less exclusive terms. The implications of this usage are discussed in more detail below.
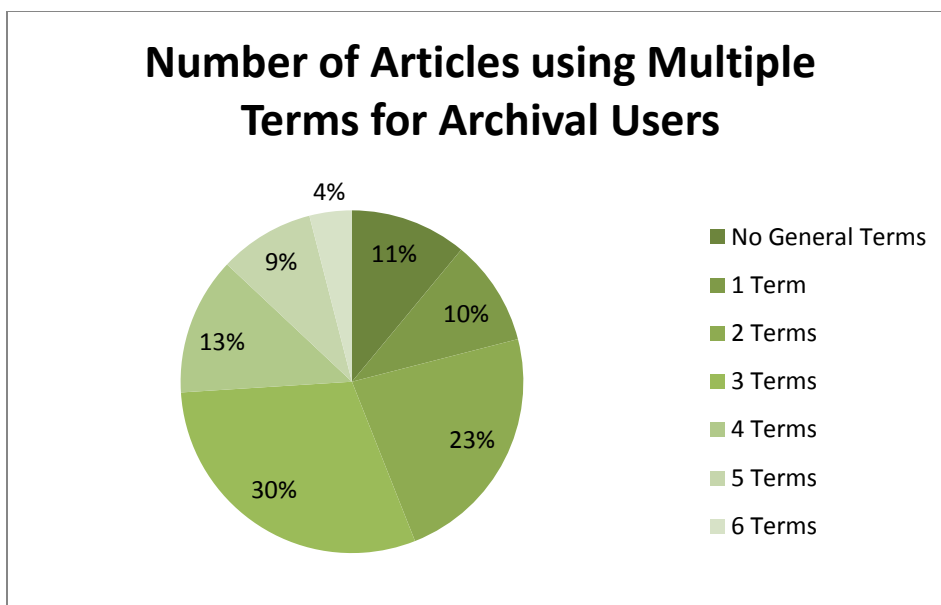
Specificity of Terms

General terms have much higher usage overall. "User" and "researcher" were used generically by the majority of authors. This chart shows generic usages of terms for users of archival materials—"researcher" was also used more specifically. For example,

authors might refer to specific groups as "historical researchers" or "genealogical researchers." These cases are not reflected in the above chart. Similarly, "scholar" was used generically in only 18% of papers, but was also used more specifically. (To be considered a "generic" use, the author's language must suggest that *any* user would be called a "scholar." Otherwise, the use was considered specific, suggesting that only scholars used archival repositories rather than suggesting that all users are scholars of some kind.) Some terms suggest influence from business or retail environments ("clientele," "customer," "consumer") while others suggest a library science influence ("patron," "information seeker"). "Patron" was significant in that it was usually used when comparisons were made between libraries and archival repositories. Not all authors used generic terms for users. Instead, they wrote from the perspective of the reference archivist's duties and did not use general terms for users. 11% of the articles reviewed had no general terms for users.

Number of Terms Used

The number of terms used by an author was also charted. As stated above, 11% of articles used no generic user terms. 10% use only one term, 23% use two terms, and 30% use three. 13% use four terms, 9% use five, and 4% use six. This breakdown in summarized in Figure 2. There was no significant date range for use of multiple terms, except for the articles that used six. In that group of four, three articles were published in 1997; the other one was published in 1956. Based on the sample (which has more articles published since 1980 than before) there are no other significant patterns for usage of more than one term for users, suggesting that archivists have generally been willing to use a variety of terms when describing users.

Number of Articles using Multiple Terms for Archival Users

4%

9%

11%

13%

10%

23%

30%

- No General Terms
- 1 Term
- 2 Terms
- 3 Terms
- 4 Terms
- 5 Terms
- 6 Terms

Figure 2: Usage of multiple user terms per article (out of 100 articles)

Gender of Pronouns

No articles used non-masculine generic pronouns for users[3] until the 1980s. Most of those that did use mixed gender pronouns in the 1980s (his/her, he/she, she/he) were contributors to the 1985 special issue of *The Reference Librarian*; other articles in the 1980s generally did not use gendered pronouns at all or used masculine pronouns throughout. By the 1990s, only one article that used gendered pronouns used only masculine pronouns. In the 2000s, no articles that used gendered pronouns used masculine pronouns—all pronoun usage was either female or mixed. Feminine-only usage only occurred once in the 1980s, the 1990s, and the 2000s. The SAA manuals used general masculine pronouns until the 2005 revision of the Series II manual by Mary Jo Pugh. This shift to more inclusive gender terminology indicates that archivists overall adapted their writing styles to social changes.

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[3]. Some articles did include mixed pronouns for archivists, but not for users.

Adjectives

In addition to charting nouns used to identify users, adjectives were also tallied. These were grouped by word modified and by decade to identify trends in usage. They were grouped such that adjectives used to describe users were separated from words used to describe uses or products of archival materials. Adjectives were not separated into those that modified general terms and those that modified specific terms. The main focus is on the kinds of adjectives used for any users (and uses, since this also implies attitudes toward users). The categories[4] "users," "researchers," and "patrons" were combined; these terms were used in similar ways and combining them shows adjective usage more clearly. For this group of terms, 55 total unique adjectives were identified. There were multiple uses of 21 of the adjectives, with "academic," "potential," "new," "experienced," and "remote" having the largest number of repeated uses. The categories "public" and "citizens" were also combined. These two terms had eight unique terms with only two terms ("general" and "interested") repeated. Similarly, "audiences," "community," "constituencies," and "client/clientele" were combined into a single category with 19 unique adjectives identified. Three terms were repeated in this group: "primary," "new," and "scholarly."

For uses of archival materials, the categories "research," "use," "purpose," and "studies" were combined. This group had 24 total terms associated with it. Five terms were repeated: "scholarly," "serious," "important," "historical," and "nontraditional." Finally, the categories "questions," "requests," and "inquiries" were combined and had a

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[4]. The categories mentioned here are those terms that authors were modifying with the identified adjectives. They are generally the same as those terms used generically for users, with a few exceptions. "Community" and "public" were not included as general terms for users because those terms were generally used to discuss those persons who *may* use the archival repository but were not yet users. However, they appear here, since it is important to understand how archivists write about the larger communities around them.

total of six terms, with none repeated. Nineteen other terms were recorded with no

repeated terms. These are included in the appendix of adjective groupings.

SAA MANUALS

The three SAA manuals included in this study are Sue E. Holbert's manual of

1977 and Mary Jo Pugh's manuals of 1992 and 2005.

Holbert's manual, though only thirty pages, uses more general terms than any of

the articles included above. She uses nine distinct terms: "inquirers," "researchers,"

"users," "audience," "constituency," "scholars," "visitors," "clientele," and "patrons."

She uses "researcher" most frequently. Her use of adjectives for users was also varied,

reflecting some of the terms seen repeated in the journal literature (e.g. "potential" and

"academic"). Adjectives used are summarized in Figure 3.

User Terms and Adjectives—Holbert (1977)	
User Terms	Adjectives
Inquirers Researchers Users Audience Constituency Scholars Visitors Clientele Patrons	General Significant Seriousness Genealogical Careless Useful Primary Academic Recognized Potential Local Undergraduate Possible Actual Young Special

Figure 3: User terms and adjectives in Holbert's 1977 SAA manual *Archives & Manuscripts: Reference and*

Access

Mary Jo Pugh's 1992 manual is more extensive than Holbert's, but still brief at

123 pages. Her use of general terms is smaller than Holbert's. She uses only five terms

for users in general: "users," "constituencies," "researchers," "patrons," and

"clients/clientele." Of these terms, Pugh does not use any one significantly more than

any other. This number of terms is closer to the journal literature as a whole. Pugh's use

of adjectives is higher than Holbert's, however, and similar to the journal literature

overall. The adjectives used are summarized in Figure 4.

User Terms and Adjectives—Pugh (1992)	
User Terms	Adjectives
Users Constituencies Researchers Patrons Clients/Clientele	Important Primary Vocational Most Many Changing Potential Public Experienced Effective Efficient Narrow Young Novice Broader Independent New Wider Mature Professional Academic Future Avocational Current Repetitive Simplistic Naïve Direct Elitist Patriotic Unskilled Amateur Less important Less justifiable Idle Qualified Most numerous Significant

Figure 4: User terms and adjectives in Pugh's 1992 SAA manual *Providing Reference Services for Archives and Manuscripts*

The 2005 revised edition of Pugh's manual is very similar in its word usage, but

Pugh does add "information seekers" as a general user term and uses some different

adjectives when discussing users and uses of materials: ""major," "'accidental,'"
"'recreational,'" "'leisure,'" "general," "scholarly," "defensive," "casual," "intensive,"
"mundane," and "routine" appear in the second edition. Differences between the two
editions will be discussed in more depth later in this paper.

DISCUSSION

In analyzing the journal literature and SAA manuals, a number of continuing
assumptions about archival users emerge. The assumptions include distinctions between
"experienced" and "inexperienced" users and who they are, slippage between "scholar"
and other user terms, assumptions about "remote" or "digital" users and their
expectations, anxiety about genealogical users, and a focus on academic historians in user
study research. Each of these will be discussed individually, drawing on both the journal
literature and the SAA manuals.

Variety of Terms

71% of authors used two or more terms when referring to archival users. These
terms seem to be drawn from a range of other fields, including retail environments. Even
though retail terminology (e.g. "customers" and "consumers") has spread beyond retail
environments, these terms appear in the archival literature only sparsely. They did not
appear in the literature until the 1980s, suggesting a possible influence from the retail
sector, but with only eight authors using these terms, it cannot be suggested that the terms
have been widely adopted by the archival community.

 Similarly, terms such as "constituency" and "client/clientele" suggest influence
from the political and legal or medical sectors. "Constituency" also only appeared in the
1980s and was only used by eight authors. The use of this term seems to coincide with

the rise in user studies in the 1980s and may suggest that archival writers were becoming increasingly aware of the need for accountability to users and a wider community. However, as with most of the terms identified for this study, authors do not define how they employ the term "constituency" or why they adopted it. It is therefore difficult to determine what, if any, significance the use of particular terms is. This is also true of "client/clientele," which appeared in the literature in the early 1980s. One early use of this term was in an article written by a former nurse who used the term heavily in her article. Other articles were less clear about the possible reasons for adoption of the term.

The overall variety of terms used by writers suggests a lack of consensus in archival publishing (and possibly the field more generally) about terms for archival users. Archival writers seem to favor the most inclusive terms ("users" and "researchers") but even these terms are not used exclusively. Based on this sample, an article may use up to six terms for users and no one term is necessarily used more than others. In the SAA manuals, the variety of terms used is high, but the preference is clearly for "users" (Pugh, both editions) and "researchers" (Holbert). "User" implies a high level of inclusivity, which is encouraging; inclusive terms suggest openness. Openness in the literature could reflect openness in practice or may influence practices to be more open. On the other hand, a lack of standardization in terminology suggests that archivists (at least in their publications) have not chosen or defined terms clearly when it comes to reference services. While "researcher" suggests that archivists perceive archival use as oriented toward knowledge acquisition (rather than economic, consumer, or political acquisition) the variety of terms overall leaves a high level of ambiguity in the literature. This

ambiguity makes it difficult to understand how terms are used, especially since term definition occurred rarely in the literature sampled here.

"Experienced" and "Inexperienced" Users

Many of the adjectives used in the journal literature suggest the assumptions that archivists have about "experienced" versus "inexperienced users. As early as 1939 Margaret Cross Norton was concerned that "very few graduate schools seem to be giving even elemental training in the techniques of the use of manuscript materials" (105). Norton was concerned about the training of scholars in the social science field, but her observation is telling—with the exception of Richards (1962) most discussions of "inexperienced" and "experienced" users are concentrated in the literature published since 1980. The assumptions appearing in these articles are mixed, but one trend suggests that genealogical/family historian users and/or students are *necessarily* "inexperienced," especially in comparison with academic users such as graduate students and faculty members. This implied distinction contrasts with Norton's early assertion that graduate programs were not training graduate students to do archival research.

Richards wrote in 1962 that archival repositories should focus on the "amateur researcher—that is the amateur historian and the genealogist" (323). While he was not entirely positive about this group, referring to one "distinct type" (324) of genealogist as "the naive (sic) citizen," (324) implying a lack of awareness or thoughtfulness rather than a lack of skills, Richards did call for archivists to engage these users in order to solve their "'genealogist problem'" (326). The sense that genealogists were, in some cases, necessarily lacking in skills is an assumption that reappears in later literature, as well.

However, Richards does also mention professional genealogists; unfortunately, he later collapses these genealogists into a category of "amateur users" (326) for whom his repository compiled a notebook of tips. Between the time of Norton's early article on reference work and Richards article on services for "amateur" researchers, it became possible to think of genealogists as necessarily "amateurs" even when they were pursuing research for pay. The slippage here is not limited to the 1960s. In 1988 Stieg wrote an introduction for a researcher's guide to archives. In it she collapses genealogists with novice researchers: "In pursuing the family tree, novice researchers need to familiarize themselves with the kinds of records" (12) which have dates, names, occupations, and addresses. There is no acknowledgement here that genealogical users might be other than novices; this is even after the article by Speakman (a professional genealogist) appeared in 1985. Speakman specifically addresses the needs of professional genealogists in archival settings. In the same 1988 volume, however, Koel specifically writes against the "old myths" about genealogists, including "the one about genealogists as little old ladies in sneakers...asking endless questions but unwilling or unable to acquire appropriate research skills" (124). She specifically writes about the advice that experienced genealogists have for beginners. While Koel is also not drawing on user studies, she does begin to push back against a particular assumption about genealogists being unskilled or inexperienced researchers per se.

In the 1985 volume of *The Reference Librarian* focusing on archival repositories, many authors mention "inexperienced" or "experienced" users. Oetting suggests that "[e]xperienced researchers are more often able to handle the brief descriptions and folder-level arrangement and description prevalent in most archives than are casual or

inexperienced researchers. Therefore an archival repository whose constituency is primarily undergraduates and administrators, for example, might need more detailed finding aids than a repository whose primary constituency is the graduate student or scholar" (28). The implication here is that undergraduates and administrators are *necessarily* inexperienced and that inexperienced researchers need more detailed finding aids. Graduate students and scholars, on the other hand, are assumed to be experienced and able to handle truncated description and arrangement. Oetting does not cite any user studies or empirical evidence for these claims. Interestingly, in the same volume of article, Mason echoed Norton, writing, "[a]nother related problem which has led to a noticeable increase in the demand for archival reference services over the past 25 years has been the lack of training of graduate students and other younger scholars in the use of archival material" (125). Without citing any studies, Mason concludes that "[i]t is evident...that we can no longer assume that history or other graduate students have received solid training in bibliography or the use of archival reference guides as tools, or the critical use of archival materials" (126). Thus, his anecdotal evidence counters Oetting, but he also highlights the underlying problem: archivists are willing to publish articles in which advice about reference services is predicated on assumptions rather than evidence. In this case, there is competing anecdotal or assumed evidence. To Oetting, graduate students and scholars are "experienced" and undergraduate students and administrations are not. To Mason, graduate students are not only inexperienced users, but the problem is due to wider institutional failing. Swank (1985) also finds the problem to be wide-spread, writing that "[i]t has become apparent that the note-taking techniques of most researchers are dismal" (84).

Similarly, both Teichman and Gildemeister assume that graduate students, faculty, and professional writers have better skills and more experience with archival materials than undergraduates and other students. Teichman states that, "[t]he [FDR] Library encourages visits by faculty members, professional writers and degree candidates, and while it does not discourage use by undergraduates, and high school and elementary students, it suggests that they follow certain procedures so as to avoid indiscriminately rummaging through manuscript collections" (178). This implies that faculty members, professional writers, and degree candidates do not have this proclivity for "rummaging," but there is no evidence given for the skills that these groups bring with them to the archives. It may be easy to assume that elementary students are more likely to rummage than graduate students are, but it is hard to believe that Teichman is being literal here—given the level of concern with preservation also evident in the archival literature, it would be surprising to me if archivists allowed rummaging in a literal, physical sense. Teichman's assumptions here, however, are similar to others: they are difficult to parse because they are vague—there is no evidence given and no definition of terms, so it is difficult to know what Teichman means here. Does he really feel that undergraduates are *a priori* more likely to rummage? Does he feel that faculty will not? What evidence does he have? How might user studies help his repository shape reference and educational services? Without the answer to these questions, it is frustrating to read that users are "not discouraged" but are treated differently because they are younger (in this case) and thus assumed to have certain behavioral characteristics. Similarly, Gildemeister writes that "[u]niversity faculty and graduate students generally have strong research skills and some experience in using archives;

many of those coming from off campus have never been in an archives before" (190).

The parallelism here implies that simply being from off campus means that a user does

not have strong research skills. While it may be true that they have never been in

archives, Gildemeister allows that graduate students and faculty can have strong research

skills but only some experience in archives. Is the same true for non-graduate students

and non-faculty? These questions are not suggesting that user studies would not confirm

these assumptions, but rather that data is preferable to assumption when it comes to

providing services to users.

In an early discussion of archival automation Clement suggested that challenges

existed when archivists had to simultaneously "train new people [to use two types of

catalogs] while dealing with psychological attachments by experienced patrons to the

'old and familiar' form" (132). Here, experience is described somewhat negatively, as a

predisposition to prefer something because it is familiar rather than effective. Clement's

view that "[a]utomation is insatiable and will not stand still for [the] status quo" (133)

further suggests that the experienced patrons here are a challenge because they are

attempting to maintain the status quo rather than assisting with the progress of

automation. Clement does not, however, mention any user studies that might have

suggested other reasons for this preference.

There is some middle ground between these two ideas in the 1985 volume.

Stewart outlines the services provided in a technical university archives and states that

"[f]irst time users are dealt with uniformly whether they are staff, faculty or off campus

visitors" (57). Further, he asserts that "[r]egardless of the type of user, once it is

ascertained that some actual indepth research is necessary—more than the consultation of

a reference book—guidelines for using the collection are...reviewed" (57). This suggests

awareness that archivists cannot assume a level of familiarity with the repository based

on the user's occupational category. Pugh echoes this sentiment in her 2005 manual,

discussed below.

What is interesting about these assumptions about user's experience level is that

they are contradictory. Some authors suggest that graduate students and faculty members

have strong research skills and that other students do not. Other authors express concern

about the lack of training for graduate students and thus future faculty members. The

collapse of genealogist and novice or naïve is also troubling. However, even this elision

is not universal. Moving in the 1990s and 2000s, concern about the experience of users

continues.

Early in the 1990s Hannestad, writing about users at the National Archives

suggested that "two rough groups" (86) existed. There were "the family history group

and the 'serious' researchers" (86). I will discuss the use of the word "serious" later in

this paper, but Hannestad also asserts that family history researchers "generally have little

or no formal training in research using archival materials" (86) but that they generally

"can be served by reference technicians" (86) rather than reference archivists. Hannestad

repeatedly uses "generally" when writing about reference services and this suggests more

dependence on anecdotal than empirical evidence. The concern here is the difference in

reference service based on a "general" division between groups—"'serious' researchers"

"tend to require the 'Vatican' reference method" (87) and family historians, one infers,

tend not to have the attention of archivists.

The 1997 volume of *The Reference Librarian* also has differing ways of discussing user experience. Cross suggests that administrative tasks can "seem foreboding to the neophyte" and that "[o]utreach is one way to making visiting an archives less intimidating to the public and the new user" (10). Danielson, countering an assumption that researchers should spend "weeks or months" with documents, comments that the "Presidential Libraries in the National Archives system...are famous for graciously helping inexperienced scholars such as high school students find information" (118). Danielson goes on to list "less experienced scholars such as students, journalists, documentary filmmakers, and webmasters" (120); the concern is for being aware of the "pitfalls" (120) of providing information from documents rather than about them, "especially" with these groups. Here the group of users assumed to have little or no experience is wider than before, but there is still no study data that has tracked their actual research skills. Finally, Dearstyne echoes Norton and Mason, writing, "[e]ven experienced researchers may be uncertain about just how to proceed" (191) with archival research. Dearstyne does not suggest any particular group as experienced here, but even if we follow the assumptions of other writers, this sentiment counters the idea that an experienced researcher, from any occupational sector, is necessarily equipped to use archival materials.

Several articles published in the 2000s focus on students and their need for orientation to archival repositories. Mazak, for example, describes the process of introducing students to the archives. However, the article is somewhat contradictory. Mazak writes that "[t]he coordinating archivists for this project found many of the generalizations concerning novice researchers accurate, such as when Pugh states, 'the

enthusiasm and excitement that students bring to research can make working with them very rewarding'" (233). In this case, Mazak's statements are based on experience working with specific classes who came to the archives as part of a collaboration between instructors, archivists, and students. However, Mazak also writes that "the archives' staff found that the novice researchers were not unlike those who have used the facility for years" (233). This is confusing, since use over many years would make a user no longer a novice—Mazak is unclear in what way novices are like the non-novices. She compares one student to a "typical problem researcher" (233) but otherwise does not expand on her statement. In 2003 Tibbo revisited the question of academic training of graduate students, including in her study of historians' information-seeking behavior an examination of "how historians are preparing the next generation of scholars" (14). As recently as 2008 Duff was investigating the efficacy of five kinds of archival instruction for students. While these more recent studies focus on a particular group of "novice" or "inexperienced" users, the trend toward user studies for reference services is encouraging. This trend suggests that archivists in some repositories are interested in determining their user's needs and levels of skill through research rather than anecdotal evidence or assumptions based on age or occupational status.

The 1977 manual on reference by Holbert makes only one mention of students: she mentions letters that "ask for 'everything you have' on the history of a state or county (these often, but not always, come from youngsters)" and writes that "it is hard not to be irritated" (11) when such letters arrive. By 1992, however, the SAA manual included a section on students. Pugh writes that "[n]ot all academic research is conducted by mature scholars" and that "most" students "respond enthusiastically to the authenticity of

original source material" (19). However, she also writes that students questions "frequently are repetitive, simplistic, or naive (sic)" (19). These terms suggest a negative view of students' assignments, thinking, or research skills. This section of the 1992 manual is also included in the 2005 revision, suggesting that students are still written about as less critical than would be ideal. She does, however, also credit "young or novice users" with an "awe"-inspired respect for materials that rivals or surpasses that of experienced researchers (42-43).

Pugh also, however, points out that scholars do not necessarily have the historical research skills that archivists seem to assume that they have (Pugh 1992 18). Pugh goes on to discuss other user groups, including administrators, teachers, professionals, and avocational historians and genealogists. She thus examines each user group individually rather than suggesting that one is necessarily more experienced than others. If anything, she suggests that many different user groups would benefit from educational reference services. This more balanced approach to user experience is strengthened into the 2000s, when more user studies appear to examine user education. It is important to note that as balanced as Pugh is, she does not draw on research when outlining each user group; in most cases, the research has yet to be done. Overall, however, Pugh agrees with the observation that "[m]any users, regardless of education, occupation, or nature of inquiry, are not well versed in archival research and need help in conceptualizing the research process" (2005 42).

"Scholar" and Other User Terms

The results of the journal literature analysis suggest that few writers overall use the term "scholar" to refer to users in general. However, these uses are not all

concentrated in older publications, as might be expected, given the continual emphasis on broader access from the SAA. Two different uses of "scholar" are evident in the literature. The first use is in those articles that focus specifically on scholarly users. The second use is the more worrisome, as it is a kind of slippage between "scholars" as a specific user type and "scholars" as all types, which thus excludes those who are not "scholarly."

Posner's 1939 article on archival development refers to "scholars" as the only users for whom archival materials are arranged and made available. In 1956, Schellenberg similarly assumes a scholarly user base, but he does have some room for non-scholars, though they are listed as simply "others" (56). Crittenden and Peckham each contributed an article to the 1956 volume of *The American Archivist* and address reference services. Crittenden is generally inclusive in his terms, although he does have some slippage between "scholar" and "historian," suggesting that historians are necessarily scholars. Peckham's article, however, has been referenced as an example of a lingering elitism in archival access and reference service. Peckham focuses specifically on scholars in his paper, but he also makes clear in his article that scholars are the intended users of manuscript repositories. (His focus is not, strictly, archives.) He goes so far as to advocate excluding those deemed "not competent" (defined as those not having read the "secondary works in their field") and calls for the librarian/archivist to "exclude those whose researchers he [the librarian] believes will be superficial or of no real significance" (225). He then specifically mentions journalists and genealogists. For Peckham, users are "scholars"—all others can be excluded for a number of reasons. While Peckham may be the most explicit in his preference for scholars as users, this

attitude is not completely absent from later articles. Evans' 1962 article is another example of an article that focuses on academic researchers, whom he calls scholars. In this case, the term "scholar" is meant to be specific, not generic, though Evans, too, has some slippage when he writes of "scholars" as "historians." This is a narrowing of even the specific user group of academics.

In the 1980s the assertion that "a trend toward more open use of archives" (Whalen 3) appeared in the literature. This assertion suggested that archivists were more open to non-scholarly users and were more inclusive in their access and reference services policies. However, the literature suggests that there are lingering assumptions about who users are or who archivists would prefer them to be. In 1984 Joyce suggested that "[r]epositories should establish appraisal procedures in which the review of documentary characteristics offers an advisory panel of academic scholars an opportunity to present their views of the research value of the documents under review" (127). These scholars would then be able to advise on whether or not to retain documents. However, Joyce also suggests that "[a]rchivists would do well to be less concerned with the status of their users and their place in the hierarchy of researchers than with providing improved access for everyone" (132). While this is certainly a laudable comment, Joyce's desire to allow "academic scholars" to have a special role in appraisal is troubling, since there is no guarantee that their advice would improve access for "everyone." Instead, a single user group would be privileged over all others. In his article on Catholic archives McQuaide assumes an entirely scholarly user—the term "scholar" is used generically and there is some indication that the nature of the archives are such that only "properly accredited ecclesiastical historians" (139) will have access at all. As a private institution,

this is perhaps justifiable, but it does make clear that not all archives are as open as other

authors would suggest. Also in 1985 Oetting implies that "scholars" do "serious

research" (32) and states that since "the explicit primary goal of manuscript collects is to

acquire and preserve primary source material in order to make available for serious

research or educational purposes" the "majority of patrons of a manuscript collection

should be individuals engaged in scholarship, study at the undergraduate or graduate

level, or personal research" (27). He goes on to differentiate between "actual

constituencies" and this assumed constituency and concludes that while archives and

manuscript repositories are different, "it can safely be stated that most archivists hope to

serve the 'serious scholar'" (29). This "'serious scholar'" is thus distinct from the "actual

constituency ... [which] often includes patrons such as lawyers, journalists, architectural

consultants and genealogists" (27). There is less slippage than hierarchy here, but the

hierarchy is equally of concern. If "serious" research is not "commercial" or "non-

educational" (27) are academic archivists justified in "implicitly or

explicitly...tighten[ing] [the] focus [to] the 'scholarly' community" (29) and excluding

other users? Oetting's language would imply that yes, this is acceptable, though overall

Oetting seems to be in favor of targeted services for various groups rather than the

exclusion of some groups.

In her introduction to *Researcher's Guide to Archives and Regional History

Sources* Steig also conflates "historical researcher[s]" with scholars, although it is unclear

how inclusive she means these terms to be. She distinguishes between genealogists and

family historians, so there is some possibility that "scholars" are not meant to be only

academics. Similarly, Dowler's 1988 article on use as a basis for archival practice has

some odd uses of "scholar." When describing mediation, Dowler writes that "mediation has generally meant [to archivist] the satisfying vision of the erudite archivist leading a grateful scholar by the hand through the uncharted forest of records to precisely the right material" (82). He then goes on to challenge archivists to "look realistically at how scholars, among other users, actually use archives" (84). At this point in his article, he tends to use "scholar" fairly generically but with the sense that "scholarly user[s]" (85) not all users. So, there is an oscillation between "scholars" as all users and some users as "scholarly."

In the late 1990s Strassberg and Danielson use "scholar" with more precision, but there is lingering confusion about how inclusiveness the term is meant to be. Strassberg, writing from a rare book and manuscript collection perspective, rather than a strictly archival one, mentions scholars as users, but does not seem to mean the term generically. On the other hand, he does not mention other user types when discussing procedures for securing materials. Danielson does appear to use "scholar" to encompass all users, whether students, filmmakers, or journalists. This is an unusual usage based on this paper's literature sample. Rather than suggesting that the only users are scholars, Danielson's usage suggests that all users are scholars.

In the early 2000s, Szary's article on encoded archival description (EAD) finding aids was particularly concerned with the "historical research community" (190) which becomes a "primary user community" (190). Szary does consider EAD finding aids' impact on other user groups, particularly new users, but his focus on humanities researchers is an echo of other slippages between "scholars" and "users" more generally. Underhill and Palmer (2002) also shift from the more general "user" to "scholars" when

discussing digital collections. However, this substitution only occurs once and is unclear in its meaning. Finally, Tibbo's article on the Primary History project specifically focuses on scholars as a distinct group of users. However, the implications for the project, as described in the article and on the survey form are such that scholars' responses would be used to help archivists create "information systems [that] should be built around user information needs and behaviors" (30). The concern here is, as with many other articles, is that it is unclear what other user groups would be surveyed in order to create these systems. It is possible that multiple systems might be designed, but this is not evident in the article. Overall, the literature is certainly moving away from assumptions that users should be or are scholarly; however, there are still instances of undefined and thus unclear word use. It is also true that some archivists continue to write of "historians" (as distinct from other users such as journalists, etc.) as "preferred" users.

Holbert's manual has some of the slippage discussed here. She uses "scholar" both generally and specifically, so it is unclear at times how inclusive she intends the term to be. While she cites Brooks' statement that exclusive use of materials for "'a particular scholar...is now outmoded'" (9) she only "discourage[s]" (9) such use. Overall, she favors "researcher" for users and focuses more on administrative concerns rather than user interactions per se.

Pugh's manuals, on the other hand, provide user overviews, including a section on scholars. Even when discussing this specific "vocational constituency," (18) Pugh is inclusive, rather than exclusive, including "independent scholars...avocational researchers or genealogists" and non-historian academics in the "scholar" category. The user profiles

are consistent between the two editions of the manual. They are inclusive rather than exclusive and there was no slippage in terminology noted.

"Preferred" Users

In 1981 Jacobsen stated unequivocally that "historians are the preferred customers of the typical archivist" (342). She contextualizes this by comparing archivists' attitudes toward genealogists and state officials and historians. She goes on to argue against this attitude, but obviously found it to be evident (at least anecdotally) in the profession. As mentioned above, Oetting (1985) felt that it was "safe" to state that archivists hope to serve "'serious scholar[s]'" (29). More than a decade later, Cox (1998) writes that "we [archivists] know that historians and other humanists, the standard users of archives, are using information technology for new kinds of research methods and tools" (26). He goes on to call historians "our preferred and most friendly researcher[s]" (27). Tucker (2006) writes that "archivists still debate the degree to which historians and public servants remain, in some cases, preferred users" (134). These sentiments are more recent than Peckham's obvious preference for academic scholars. However, there are echoes of the FDR Library feeling in the 1980s that students were more likely to "rummage" and thus needed particular guidance. The concern for this paper is the degree to which personal preferences (or institutional) preferences affect reference services policy.

User Studies and Focus

Interestingly, the increasing number of user studies also suggest that some preference for or familiarity with historians and humanities users is still prevalent amongst archivists. In 1997 Cross mentioned that "historians have been the group [of users] most often studied" (14) and this seems to be true into the 2000s. Tibbo (2003)

provides an excellent literature review of these studies when contextualizing the

Primarily History Project. Some of the studies are not focused on archival materials, but

include libraries and other research processes. In contrast to this body of work, Duff and

Johnson (2003) state that "none of the user studies that have been conducted in the last

decade have focused solely on genealogists, one of the most frequent users of archives"

(79). As recently as 2008 Van Wingen and Bass acknowledged that "academic historians

do not constitute the sole or even the majority of user of archival collections" but still

focused on "that special, complex historical relationship between historians and

archivists" in their study. While user studies were not the focus of this paper, the

literature on reference frequently mentions user studies or the lack thereof. In this case, it

is an interesting point that historians seem to have been more studied than other archival

groups, although user studies have concluded that they are rarely a large group of

archival users. More interesting is the use of terms such as "special" which implies that

somehow historians (used narrowly by Van Wingen and Bass to mean academic

historians) are perhaps more important or worthy of study even though they are not a

large body of users. Students are also studied, but these studies are also focused on

academic institutions, suggesting that archivists need to broader their field of research to

encompass a larger range of user groups.

Genealogists

As early as 1939 Margaret Cross Norton was writing that "[t]he genealogist is

generally the most frequent visitor to the archives department and frequently its most

articulate friend" (105). However, she advocated "firm policy" (105) about the amount

of staff time allocated to genealogical research. Writing in the same year, McCain called

genealogists "one of the most vociferous groups that engage in research" and was concerned that "the attitudes of custodians of archival materials toward genealogical researchers" (239) were "unwise" if and when they agreed with "a recent statement by an archival official that 'all genealogists should be hanged'" (238).[5] By 1947 Norton was writing that "[m]any archivists object to genealogical work as requiring a disproportionate amount of time" (64). She firmly states, however, that archivists must not "question the value of the use to which a record is to be put" but must "be able and willing to give that [genealogical] service" (64-65). She insists that archivist-compiled indices will speed genealogical work and urges archivists to compile them "as soon as his resources permit" (65). Since this early egalitarian stance on genealogists, genealogical users have persisted in the literature as a source of discussion and possible anxiety for archivists.

Peckham's article, mentioned above, certainly makes it clear that he sees no value in genealogical work being pursued in manuscript repositories. His language clearly implies that he saw genealogical research as "superficial or of no real significance" (225). His desire to exclude genealogists from repositories is cited by Pugh (1992, 2005) as an example of earlier views on genealogists and the exclusivity of archival repositories. As seen with Norton and McCain, however, Peckham is not so much indicative of a single early view; rather, his vitriol suggests that anxiety about genealogists continued to be an issue for archivists even in light of early openness.

Richards (1962) has more in common with Norton than Peckham and advocates for services targeted at "amateur researchers—that is, the amateur historian and the

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[5]. McCain does also write that he can "appreciate" (238) but is firmly in favor of treating genealogists well, especially since he was a "public servant" (238).

genealogist" (323). To this end he describes the notebook guide compiled by archivists in New Jersey for genealogists. In addition to addressing the genealogists' needs, Richards states that "the guide...proved to be an effective public relations tool" and that it helped genealogists "feel...welcomed" (326). He suggests this same type of guide as a solution for other repositories who feel that they have a "'genealogist problem'" (326). This willingness to create research tools for genealogists recurs in the literature; so, too, do statements that hint at an ongoing friction between archivists and genealogical users.

Writing in the early 1980s, Jacobsen indicates that archivists in the years since Richards were not completely committed to serving genealogists. He writes that the "determined and persistent legion known collectively as family historian, or genealogists" have put repositories "under siege" (341) in recent years. However, even given this combat analogy, Jacobsen is dismayed by the "considerable tension and misunderstanding on both sides" (341) of the reference desk. As mentioned above, he wrote that "after state officials, historians are the preferred customers of the typical archivist," (342) citing anecdotal evidence from another archivist that "genealogists are the most selfish of all people" (342). Jacobsen is generalizing here about archivists, but his dismay implies that at least interpersonally, archivists were still unhappy with the number of genealogists in archival repositories. Jacobsen writes against these attitudes, pointing out that "genealogists...have as much right to use our archives as anyone" and questioning whether genealogists, who are "taxpayers and citizens all," can legitimately be made to wait while archivists assist "fellow public servants and superfluous historians" (342). He states firmly that archivists' "attitude toward genealogists must change" (345). While Jacobsen draws on anecdotal evidence to characterize archivists,

the appearance of his plea for a "re-educat[ion]" (341) of archivists is evidence in itself

that tensions about genealogical users was unresolved by the opening of the 1980s.

A few years later a number of articles appeared that again brought genealogists to

the fore. Freeman's oft-cited article of 1984 was a call for research in order to "learn

systematically, not impressionistically...who are users are" (112). She strongly echoed

Jacobsen, calling the interactions between genealogists and archivists "adversary

relationships" (113). Freeman also writes that archivists "tend to be cool" to those not

professionally trained to do research, even those that "category probably includes most of

our clientele" (113). She feels that genealogists are "one of our largest clienteles" (113).

Her larger concern with the need for user studies is well-taken. The general feeling that

she describes archivists as having toward genealogists is certainly not an attitude

endorsed by SAA ethical codes. How much those attitudes may be reflected in actual

practice remains to be seen, however: it is still true that very few studies have been done

on genealogical users or archivists.

In the same year, Speakman published an article on reference from the

perspective of a professional genealogist. She urges archivists to "examine [their] own

operation[s]" to see if they are "stagnant in purpose, resistant to change, fearful of

progress, and less than pleased when patrons arrive at their door[s]" (171). Her

comments are directly at reference archivists in relation to users in general, not just

genealogists, but she does point out that her work is different "from that being done by an

academic researcher" and that it "must be treated differently" (167) for legal and

confidentiality reasons. In contrast to Speakman's call for sensitivity to the nuances of

her work, Joyce lumps all genealogists into a generic group of "ultimate applied

researchers" who need "very specific" historical information and "are frequently indifferent to an understanding of the context that is so important to identifying records" (132). While he uses the distinction between "academic" and "applied" research to urge archivists to engage in educational outreach, his broad categories overlook the kind of work described by Speakman, in which she must understand context in order to trace inheritances.

In the 1985 *Reference Librarian* volume, Whalen characterizes the "past" feeling of archivists toward genealogists by quoting McCain's anecdote about the official who commented that all genealogists should be hanged. However, she asserts that "genealogists are not only tolerated today, but generally given the same consideration as other users in both libraries and archives" (4). Certainly the literature bears out that fewer writers espoused views such as Peckham's; but, an awareness of genealogists as a group that "often does not achieve favor" (Joyce 132) continues to appear in the literature. In the same volume, O'Toole describes the genealogical use of diocesan archives and characterizes genealogy as having "'gone ethnic'" and "broadened considerably in recent years beyond its narrow base among those old families of English stock" (155). There is a general tone of openness about genealogical users, but this characterization suggests the need to temper an old view of genealogy with a more inclusive view. Also in the same volume, Gildemeister describes the services to genealogists being performed by graduate assistants; this may be due to a small staff (three faculty, four graduate assistants, and one clerk) or the fact that genealogical and administrative reference was only 20% of all reference work. It is interesting that he

singles out genealogical work in his breakdown of services, but little can be made of this given the lack of details in his article.

Later in the 1980s Stieg and Koel contributed to Larsen's 1988 researcher's guide. They represent two different views on genealogists. Stieg's language is more dismissive; she conflates family historians with novice researchers, as described above. She also assumes that all genealogists and family historians "are after a single, isolated fact rather than more comprehensive information" (11). Koel, on the other hand, acknowledges that "scholarly genealogical research is being done" and describes genealogists as "diligent" (125-26). Koel sees genealogy as an "auxiliary discipline of history" (124) and attempts to write against the "conflict" (124) between genealogists and archivists. In view of Whalen's claim that genealogists and archivists are on reasonably good terms by the 1980s, Stieg and Koel illustrate that the relationship was still seen as fraught by some writers.

Early in the 1990s Hannestad's article on reference at the National Archives suggested two rough groups of users: family history users and "'serious'" (86). His assumptions about the skills of each group are discussed above, but what is interesting here is his use of "serious" (in quotes) to describe non-family history users. Since Hannestad finds family historians to be limited in skills and also needs, he writes that they "generally...can be served by reference technicians" (86). "'Serious'" researchers, on the other hand, get "detailed discussions of their research topics with a variety of archivists" (87). As with many articles in considered here, there is no user study that substantiates this division. I do not claim that it may not be true, but it is discouraging to see that some archivists were willing to consider family historians as non-"serious" (a

usage Hannestad never clarifies) as recently as the early 1990s. Encouragingly, both

Eastwood (1997) and Barth (1997) found evidence through user studies that "the

antipathy towards genealogists once evident in the literature has all but vanished in favor

of more positive attitudes, and these attitudes were confirmed in [Edwards'] interviews

with archivists" (Eastwood 31). Eastwood is referring to a Canadian thesis from 1993

here. Similarly, Barth's 1997 study of genealogists and archivists found that archivists

used the most positive terms when describing genealogists. He concludes that

"[g]enealogists may be the friendliest group in the eyes of archivists" (19).

The recent literature suggests that attitudes are indeed changing and are becoming

more positive. This does not mean, however, that all anxiety has eased. Duff and

Johnson (2003) conducted a user study on genealogists' information-seeking behavior;

according to the authors, this was the first study to focus solely on genealogists. The

study was small and not generalizable, but it indicates a willingness to investigate

genealogists in their own right. By 2006 Tucker still that "[e]ven today in an era in

which the epic nature of history is often closely tied to the individual story, archivists still

debate the degree to which historians and public servants remain, in some cases,

preferred users" (134). Tucker also cites the reasons archivists find genealogists to be

"problematic users" and concludes that "some of these arguments present the

development of a clear hierarchy in which genealogists fall low in our priorities" (133).

Duff and Fox (2006) conducted a study on archivists' view of reference work. While

some archivists indicated that they did create "a general guide" on conducting

genealogical work, some also "suggested that they provided an even more in-depth

orientation when the user was a new scholar of PhD student" (134). Finally, O'Neill

(2007) describes the users of NARA's electronic records program and cites user surveys that confirmed categories for users. Genealogists were found to be more "fact-finders" than "analysts" (34). Not only is the use of data encouraging here, but O'Neill's language also resists making any assumptions or judgments about the value of either approach. The literature overall suggests that archivists and genealogists continue to have a complex relationship. The overall trend in the literature is toward more acceptance and the few studies on this user group support this trend. However, complacency should not be allowed to set in—archivists must continue to work to overturn assumptions about genealogists and other uses and instead rely on research data when forming policies and services.

Holbert's manual (1977) does not address genealogists in a targeted way. She lists them as part of the "general public" (2) and later mentions that "form letters, duplicated in quantity and filled in as appropriate, are often used to answer genealogical questions" (10). She does not make any statements about genealogists as such, however, leaving the debate about genealogical users in the realm of the journal literature and other monographs.

As with scholars and students, Pugh includes an overview of genealogical users in both of her manuals. She writes that "in some repositories, genealogists are not considered qualified researchers and are denied access; in others they are tolerated yet not encouraged, but in many they are welcome" (1992, 22). In 2005, Pugh strongly states that this view of genealogical research as less valuable is "wrong" (2005, 58). Pugh also calls genealogists a "valuable constituency" but also characterizes them as "often" having "simpler and more predictable" needs which can be effectively served through the use of

educational programs and "self-help devices" (1992, 23). In both editions of the manual

Pugh is concerned about archivists who may feel "that some types of users such as

genealogists deserve less help than others" (2005, 124). The second edition, even more

so than the first, clearly and strongly advocates for archivists to provide equal access and

service. The manuals suggest that even as attitudes toward genealogists soften,

guidelines encouraging this trend may still be necessary.

Digital Users

As early as the 1980s archivists have been concerned with the role of digital

technologies in reference services. By the 1990s and 2000s, many assumptions about

users' expectations in an increasingly digital world had appeared in the literature. In the

mid-1980s Clement (1985) was concerned that experienced users' preference for the

'old' and 'familiar' would create problems for the increased automation of the archival

catalog. Automation began to be more wide-spread in the 1980s and into the 1990s; by

the late 1990s there were a number of articles specifically concerned with the impact of

the Internet on archival users and potential users.

Barth's survey of archivists and genealogists was concerned with how digital

technologies would affect genealogical research, while Ruller (1997) was concerned with

the users and design of the SARA Gopher interface for the New York State Archives.

Neither make particular assumptions about users, but are generally focused on launching

digital access. Hull, however, writing in the same volume as Ruller, felt that "users

[were] quickly enamored by the scope and variety of information available with a 'click

of the mouse'" but also characterized some users as "naive (sic)" and having "inflated

expectations that *all* Federal data [was] easily accessible on-line" (152). This use of

"naïve" suggests that Hull expected users to have similar levels of knowledge about digital resources as those who digitize them and make them available. Dearstyne, also contributing to the 1997 *Reference Librarian* volume, worried that the "increasing number of people...routinely using the Internet for distance access to information" would "desire, or expect, that they will be able to secure information about, and information in, archival records as a distance without visiting the repository" (198). The assumption that users will expect to find all or most information online is echoed by Underhill (2002), Bell (2002), and Salzmann (2004). Cox (1998) urged that information systems should make archival resources more accessible and "as easy as possible" (27) since research indicated that historians, at least, were less likely to use resources if they perceived that "barriers exist to their [resources] use" (27). By 2007 Cox was warning "archival managers...to guard against remote users being treated as second-class users and [being] given second-class service" (1). He also echoed the sentiment that "our researchers, patrons, and other users have a 'right now' mentality about the service they expect from our repositories, especially from our reference rooms" (7).

By 2001 Szary assumed that "users have become accustomed to using online public catalogs" and that EAD finding aids online would perhaps lead to "more inquiries from...other communities" than archives' "expected clientele[s]" (191). These communities and clienteles are not defined and it is interesting to note that Szary already assumed a broad familiarity with OPACs by 2001. Hedstrom's 2002 article suggested that since "remote access removes barriers of distance and time," (40) online collections may "becom[e] *the* collection for many users" (41). She emphasizes the mediated nature of online collections and resources and warns archivists about the potential for de-

contextualized online materials to "produce superficial digital collections" that could "reinforce dominant master narratives" (41) for users whose only exposure to a repository may be remotely. Hedstrom does not make explicit assumptions about users here, but she cautions archivists about the "few clues" (41) provided to users about how online materials are chosen for digitization/exhibition. The implied assumption here is that users cannot be faulted for not understanding context—archivists must include metadata that resists these "superficial" online collections.

Duff and Fox (2006), Tucker (2006), and O'Neill (2007) all pursued studies that to differing degrees add to the discussion of remote users. Duff and Fox, in interviewing archivists reported that one respondent characterized remote questions as "more specific" which meant that archivists "did not need to know about the user's background" (138). Another respondent felt that "users who have never visited an archives have a very difficult time searching the archives' catalogue remotely" (139). While these comments are not generalizable, they do suggest that at least some archivists are concerned about the differences between on-site and remote users. These archivists may not be immune to assuming how much information is needed from a user or how well users navigate a catalog, but they do at least show a concern for remote users as distinct from on-site users. Tucker noted that "the Web is becoming the basic tool by which [archivists] serve [genealogists]" (130) and called for "serious attention" (130) to online usage by genealogical users. Tucker's assertion about the use of the Web by genealogists is presumably based on anecdotal evidence; she cites no studies that indicate this trend. O'Neill outlines the use of NARA's electronic records program. She relates the differences in use of the records and cites online surveys that suggest that her distinction

between "fact or information seeking data users" and "researchers" (21) is valid. Finally, Botts and Kata (2006) examined Prensky's concept of digital natives and digital immigrants. Both groups are considered more "technologically savvy than researchers even ten years ago" (7). According to Botts and Kata users similarly "expect that Web access will be available 24/7, include multi-media, provide one-stop shopping, and customized responses for individual users" (7). The authors advocate collaboration if archivists hope to "respond to these expectations" (7). This article, along with many others that address remote users and reference services, assumes user expectations that may seem intuitive or logical, but in many cases are untested.

Electronic records are mentioned only briefly in the 1992 SAA manual. Pugh's only comment about users in this context suggests that "as archives become part of online networks themselves, users may be able to tap directly into electronic databases managed by the archives, though not necessarily held by it" (1992, 76). By 2005, she had added a section on the impact of technology on reference services since the first edition in 1992. In this section she suggests that "almost every researcher has desktop access to extended power of computation" (2005 1-2). She goes on to express concerns about "the new popular illusion that all information is online"; Pugh found this "illusion" particularly worrisome since she felt that this user expectation, coupled with "the normal consequences of the Principle of Least Effort" (4) would lead to challenges for both users and archivists. She repeats this idea later in the manual when she writes "the 'principle of least effort' takes on new meaning as searchers use only those information resources readily available in electronic form" (67-68). Both of these ideas—the ubiquity of personal computers and the illusion of everything online—are lacking in user study data.

Pugh challenges archivists to meet the needs of all online users since "even experienced users may rely on reference archivists to provide road maps through the forest of citations provided by online-search services" (4). She also warns against blaming users if and when they seem to follow the principle of least effort. Instead, she advocates education and outreach. However, it is important to realize that even the most recent SAA manual on reference services relies on assumptions about digital users because a body of genealizable research has yet to emerge in the field.

CONCLUSION

In considering the archival journal literature and SAA manuals, it is difficult to come to neat conclusions. While the literature indicates that archivists are increasingly aware of the role of users in archival repositories, there are also indications that assumptions about users continue to appear without studies that examine the assumptions. Lingering assumptions about users' level of skills in relation to their occupational status and about the value of genealogical use suggest that archivists have not completely shifted to a user-, rather than a materials-focused, concept of archival practice. On the other hand, archivists are conducting more user studies and are beginning to study a wider variety of user groups. The literature is primarily marked by oscillations between binary oppositions, for example references "serious" vs. "nonserious" use, genealogists as valuable vs. genealogists as a burden. The language that archivists use to write about users suggests that archivists embrace a wide range of users and value them as "researchers." However, this language also suggests that while most user groups are accepted, there may not be accepted equally. Preferences for certain user groups are not confined to older literature and user studies reflect an uneven investigation of user

groups. The most important conclusion to draw from this analysis of archival reference literature is that more user studies are needed on a wider scale and about more user groups.

Suggestions for future research

This paper attempts to lay a foundation of awareness for reference archivists. It is meant to serve as a representative sample of the ways archivists have written about users and the assumptions that archivists have communicated to each other. Future research should be done to determine if these assumptions appear in practice. If so, it should be determined if, and to what degree, such assumptions may affect user satisfaction, archivist satisfaction, and archival services. In addition, more user studies are needed to determine if assumptions about users are accurate. For example, *do* remote users expect to find all archival materials online? If so, is this a naïve expectation or are there other factors that might contribute to such expectations? Are graduate programs training students to conduct archival research? If not, why not? If so, are archivists involved? Do other user groups have educational outlets? How might reference archivists become part of an educational framework to educate all users, not just those assumed to be less savvy or experienced? Studies beyond individual archival repositories are still needed in order to identify trends in use and similarities and differences between user groups. Study data with a wider scope can be used by multiple institutions as they attempt to design services according to user behaviors and expectations as they are identified through research, rather than assumptions and anecdotal evidence. It is unwise to pursue technologies, policies, or services in response to assumed expectations. More, and

continued, studies of user behaviors online are warranted before major changes or policies are introduced.

Mary Jo Pugh argues that "qualitative assessments of service outputs are needed to evaluate such attributes as promptness, thoroughness, courtesy, care, and adequacy of response. Meaningful evaluation of reference services compares performance with some standard—either repository objectives or professional standards" (2005, 259). Following this call, archivists must continue to embrace user studies as they strive to meet the high standards of the SAA for archival access and reference services.

APPENDIX A: DATABASE SEARCH RESULT TABLES

The tables in this appendix reflect the results of database searches. The first table lists raw results of each search in each database. Each table following the first indicates the number of raw results for an individual database along with the refined results and finally the relevant results for that database. The "total (raw)" number of results is the total of all of the search terms. The "total (unique)" results indicates the number of unique articles for all of the searches in a database; this number is generally smaller, indicating that some articles appeared under more than search term. The total unique articles for each database were then compared to eliminate repeated results across databases. A final set of 100 articles was generated from these results. The dates included in the table titles are the dates (or date ranges) when searches were completed.

				Number of results (raw)		
Terms	LISTA (01/27/2010) ; (02/07/2010)	LISA (01/27/2010) ; (02/07/2010)	Library Literature & Information Science (01/27/2010) ; (02/07/2010)	**Library Literature & Information Science** Retrospective : 1905-1983 (01/27/2010); (02/07/2010)	**ERIC** (01/27/2010) ; (02/07/2010)
"archive reference"	1	1	1	0	0
"archives reference"	37	6	0	0	0
"archival reference"	15	22	10	0	10
"archive history"	3	4	1	0	0
"archives history"	66	84	4	3 (2)	1
"archival practice"	51	89	15	4	5
"archival service"	22	31	10	6	2
"archival services"	269	56	9	2	11
"archival history"	20	21	3	3	4
"archive profession "	6	19	0	0	0
"archival profession "	130	128	26	10	6
"archives profession "	14	98	1	1	0
"reference archivist"	10	10	2	1	1
"archive service"	42	93	6	0	1
"archive services"	64	75	12	1	3

LISTA Refined Results (01/27/10-02/07/10)				
Terms	Raw Results	English-only	US-only	Relevant
"archive reference"	1	1	1	0
"archives reference"	37	36	3	3
"archival reference"	15 (14)	15 (14)	13	13
"archive history"	3	3	2	0
"archives history"	66	53	9	1
"archival practice"	51	44	6	4
"archival service"	22	22	4	1
"archival services"	269		6	1
"archival history"	20	17	3	1
"archive profession"	6	6	4	2
"archival profession"	130	128	11	2
"archives profession"	14	14	11	1
"reference archivist"	10	10	9	4
"archive service"	42	42	3	0
"archive services"	64	62	1	0
"archives service"	39	37	0	0
"archives services"	47	43	1	0
Total (Raw)	749	452	86	34
Total (Unique)	---	---	---	31

LISA Refined Results (01/27/10-2/07/10)				
Terms	Raw Results	English-only	US-only	Relevant
"archive reference"	1	0	0	0
"archives reference"	6	4	3	2
"archival reference"	22	20	19	15
"archive history"	4	0	0	0
"archives history"	84	64	16	0
"archival practice"	89	67	4	2
"archival service"	31	12	0	0
"archival services"	56	32	2	2
"archival history"	21	12	3	1
"archive profession"	19	15	1	1
"archival profession"	128	120	13	4
"archives profession"	98	62	5	4
"reference archivist"	10	8	8	7
"archive service"	93	26	0	0
"archive services"	75	42	0	0
"archives service"	45	33	0	0
"archives services"	83	49	0	0
Total (Raw)	737	484	74	38
Total (Unique)	---	---	---	30

Library Literature & Information Science Refined Results (01/27/10-02/07/10)				
Terms	Raw Results	English-only	US-only	Relevant
"archive reference"	1	1	1	0
"archives reference"	0	0	0	0
"archival reference"	10	9	9	9
"archive history"	1	1	0	0
"archives history"	4	4	3	0
"archival practice"	15	13	11	6
"archival service"	10	8	2	0
"archival services"	9	6	4	1
"archival history"	3	3	3	0
"archive profession"	0	0	0	0
"archival profession"	26	25	25	7
"archives profession"	1	1	1	0
"reference archivist"	2	2	2	2
"archive service"	6	5	4	0
"archive services"	12	10	---	0
"archives service"	2	0	0	0
"archives services"	5	5	0	0
Total (Raw)	100	88	65	25
Total (Unique)	---	---	---	25

Library Literature & Information Science Retrospective: 1905-1983 (01/27/2010-02/07/10)				
Terms	Raw Results	English-only	US-only	Relevant
"archive reference"	0	0	0	0
"archives reference"	0	0	0	0
"archival reference"	0	0	0	0
"archive history"	0	0	0	0
"archives history"	3 (2)	3 (2)	3 (2)	0
"archival practice"	4	3	3	0
"archival service"	6	5	4	1
"archival services"	2	2	2	0
"archival history"	3	3	3	2
"archive profession"	0	0	0	0
"archival profession"	10	10	9	7
"archives profession"	1	1	1	0
"reference archivist"	1	1	1	1
"archive service"	0	0	0	0
"archive services"	1	1	0	0
"archives service"	8	6	1	1
"archives services"	9	9	1	1
Total (Raw)	30	28	25	13
Total (Unique)	---	---	---	12

ERIC Refined Results (01/27/10-02/07/10)				
Terms	Raw Results	English-only	US-only	Relevant
"archive reference"	0	0	0	0
"archives reference"	0	0	0	0
"archival reference"	10	10	10	5
"archive history"	0	0	0	0
"archives history"	1	1	0	0
"archival practice"	5	5	5	2
"archival service"	2	2	2	1
"archival services"	11	11	11	3
"archival history"	4	4	3	0
"archive profession"	0	0	0	0
"archival profession"	6	6	5	2
"archives profession"	0	0	0	0
"reference archivist"	1	1	1	1
"archive service"	1	1	1	0
"archive services"	3	3	3	0
"archives service"	0	0	0	0
"archives services"	8	8	0	0
Total (Raw)	44	44	41	14
Total (Unique)	---	---	---	10

APPENDIX B: ARTICLES INCLUDED IN THE DISCUSSION/ANALYSIS SECTION OF THIS PAPER

The articles listed here are those that were analyzed for statistics on word usage.

A complete list of works cited and consulted is included in the bibliography.

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