**Reference Encounter Report Form**

*Part I: Reference Interview with Abductive Reasoning (Designed to transform an explicit question into the tacit question)*

1) What was your patron’s original (explicit) question?

My patron’s question was: “Where can I find the papers of Justin Winsor, former President of the American Library Association, and are they available online?”

2) Describe your patron’s motivation and secret.

My patron wanted to find writings by Winsor that described his vision for libraries, where he got his ideas about libraries, and more general information about what his tenure as first president of the ALA was like. She wanted to know this because her secret was that she was writing a paper for a class comparing the leadership styles of Winsor and the current ALA president.

3) What clarifying questions did you ask, and why?

The first question I asked was what my patron meant by papers. I honestly think both of us were confused by what that meant. She answered in terms of subject and said she’d like to read about where he got his ideas about libraries and his vision for how libraries should work. I asked about papers further to find out if this meant physical papers available online through photos or recordings of Winsor’s papers. She replied that recordings would work best. I then asked if these sources would need to be scholarly, to which my patron replied yes because she was using them for a school paper. Following this up, I asked what the topic of her paper was, which is how I uncovered her secret of wanting to compare ALA presidents. Then I asked if she needed only papers by Winsor, and she said that it would be preferable but not necessary. She said the same thing when I asked if the sources had to be available online. I then asked if she had any specific papers in mind that she’d like access to, and she told me she was interested in finding a transcript of a speech Winsor made in 1877. I thought this clarified my mission enough to get started and concluded my opening questions.

4) Summarize the clues you have discovered with your clarifying questions using the FATES method:

Format – What type of media is the patron interested in? (Books, Articles, Ready Facts, Archival Objects, Web Sites, etc.)

My patron was interested in articles and books that included or consisted entirely of writings by Winsor. She was also interested in books or articles that provided information about Winsor’s tenure as ALA president.

Audience – What level of scholarly sophistication is the patron looking for in their results?

The patron was looking for a moderate level of scholarly sophistication. She was writing a paper for a class, so the sources would have to be reputable, but they wouldn’t need to take a deep dive into the topic she was interested in. She needed information about Winsor’s leadership style that came straight from him or from a reputable source.

Topic – What is the question about?

The question was about the leadership style and library ideals of Justin Winsor.

Essential Content – What is must be included in the answer in order for it to be complete?

The answer had to at least include information from a reputable source about how Winsor led the ALA during his tenure as president and how he thought libraries should work. Ideally, some of the sources would be by Winsor himself, and all the sources would be available online. I would also need to find the speech from 1877 she mentioned for the answer to include everything she asked for.

Scope – What are the historical, geographical, or conceptual limits set by the patron’s question?

The sources would have to come from either during the time Winsor was alive or after his death. The speech from 1877 also set a historical time limit. The concept of papers was reworked by the patron’s answers. She didn’t want papers in the sense of physical papers written by Winsor; she instead was interested in writings by either Winsor or another author that could give her an idea of what his tenure as ALA president was like, and these writings could come in article or book form.

5) Recapitulate your patron’s explicit question to reflect your understanding of their tacit question.

“Where can I find papers written by or about Justin Winsor, former President of the American Library Association, that would tell me about his leadership style and ideas about libraries, and are they available online? If possible, could you find a transcript of a speech he made in 1877?”

*Part II Determining Where to Begin with Deductive Reasoning (Designed to build a starting strategy)*

6) What do the FATES tell you about how you should construct a search? Example: “My patron’s topic is Golden Age Science Fiction, and they want to know who the editors of Astonishing Tales were, specifically. Because the patron only needs general information on a broad topic not looking for research, I don’t need to search the article databases since those tend to focus on very specific topics. Since this is for personal edification instead of something that need to cite in a paper, the work doesn’t have to be scholarly or peer reviewed. Since they care about the Golden Age, I’ll need to make sure it has coverage for the 1940’s – 1950’s and maybe a little earlier if Astonishing Tales was from the Pulp Age instead.”

My patron’s topic is the leadership and ideals of Justin Winsor during his tenure as ALA president. She would ideally like to find papers written by Winsor himself that cover this topic, so I should conduct an author search with Winsor as author. However, I will also need to search for books and articles that will cover this topic in the case that Winsor’s writings do not cover the topic. Because she is using this information for a school paper, my sources will need to be scholarly. I will specifically try to find a speech Winsor made in 1877 that my patron is particularly interested in. Once found, I will need to check if the resource is available online.

7) Given your answer in question 6, which of the following type(s) of reference sources are most likely to hold the answer to the patron’s questions? justify your selection in a way that mentions the purpose or function of the type of reference source. If none of these seem like a good fit, explain why not. Example: “My initial strategy is to consult an almanac because it is the reference source most concerned with facts associated with the time of year and my patron is looking into when is the best time to plant heirloom tomatoes in Florida.”

Almanac, Atlas, Bibliography (Including Library Catalogs and Archival Finding Aids), Biographical Dictionary, Chronology, Concordance, Dictionary, Directory, Encyclopedia, Gazetteer, Guidebook, Handbook, Index (Including Article Databases), Manual, or Yearbook. (Note: The Internet, Scout, and Search Engines like Google and Bing are not types of reference sources.)

My initial strategy is to consult a bibliography because this is the source most likely to contain individual works by Winsor in both book and article form.

8) Using 6 and 7 as your logical building blocks, give your rationale for where you intend to begin your search. Be as specific as possible. (Example: “Given my understanding of the question, and of the types of reference sources that exist, I should begin my search trying to find a retrospective encyclopedia of 20th Century Science Fiction and Fantasy since it will likely have general interest entries for Astonishing Tales. I can then move on to look up any references it sites if the patron wants further details.”

Because my patron’s ideal source is a work written by Winsor that explains his beliefs and ideals about library work, I should begin my search looking for an article or book written by Winsor during or after his tenure as ALA president that covers how he lead the ALA and his vision for libraries in at least some of the work. I can then look for sources written by others to flesh out the details of Winsor’s work with libraries.

*Part III: Documenting Your Search Process with Experimental Reasoning (Designed to illuminate your decision making)*

9) Tell the story of how your search unfolded. Here you will leave a breadcrumb trail, beginning with the starting point your deduced in question 8, then documenting each subsequent source you visited in your search process. Provide the following for each: A). The name of each source used during your search (especially those you used unsuccessfully), B). A statement of why you selected that source, and C). how you knew this resource would not answer the question and it was time to move on to the next resource. You may find it useful to type up this section as an outline. At the end of this section, please include the unique identifier(s) you gave to your patron so that I can examine your final sources. Examples of a unique identifier are a full bibliographic citation, a digital object identifier (doi), or a webpage permalink. If no unique identifier was available, explain what you did to ensure the patron could access the source(s) you provided.

I began my search using Amelia to do an author search with Winsor as the author because I thought this would be the easiest way to find any works written by him. This did produce the desired effect of pulling up works by Winsor but proved less helpful because of the content of the works. Winsor’s writings are mostly historical recordings, and thus only one work out of 18 looked promising: a book titled *Justin Winsor, Scholar-Librarian*. However, after looking at the work in Amelia and searching for it in Scout, I discovered the book was only available in print and would have to be obtained through ILL – not ideal. I also could not find any kind of summary or excerpt from the book, so while I could assume that the book was an autobiography, I could not confirm it. I went back to Amelia and tried searching “winsor justin” as a keyword search. This pulled up a promising title, “The Life and Letters of Justin Winsor,” which I found on Scout as available through pdf. However, this was only a pdf of a list of dissertations, and the work would have to again be obtained though ILL. I could not find any summary of the work and had to assume the work’s content from the title, which was at least more descriptive than the first work. I then decided I would try to find the speech from 1877 and tried a keyword search in Amelia for “winsor justin” and limiting the year from 1870 to 1880. When this returned nothing, I changed the keyword to “american library association,” again with no success. I tried varying the years, going both more specific and more broad, but never returned anything. I ended up giving up this attempt at finding the speech as it was taking too much time, and I wanted to find at least one more source for my patron. At this point, however, about a half hour had passed, and I decided to continue my search individually and get back to my patron later. On my own, I decided to check out the research guides link on the library’s homepage. After finding library and information science in the subject listing, I clicked on databases and journals and found Library Literature and Information Retrospective. My author search for Winsor proved unfruitful and I tried a search of his name without a field designation. I found several promising-sounding articles, but ended up choosing an article titled “Winsor, the quintessential librarian” because it was the only one readily available as a pdf. I also was able to find a review of *Justin Winsor, Scholar-Librarian* that confirmed my assumptions about the content of both this title and *The Life and Letters of Justin Winsor*, which left me confident in my recommendations of both.

“Winsor, the quintessential librarian:” http://content.ebscohost.com/ContentServer.asp?T=P&P=AN&K=525543033&S=R&D=llr&EbscoContent=dGJyMNXb4kSepq84y9fwOLCmr0%2Bep7NSr6y4SrKWxWXS&ContentCustomer=dGJyMPGqs1Gyr7NJuePfgeyx44Dt6fIA

Boromé, J. A. (1978). *The life and letters of Justin Winsor*.

Winsor, J., Cutler, W., & Harris, M. H. (1980). *Justin Winsor, scholar-librarian*. Littleton, Colo: Libraries Unlimited.

10) Per your patron state did you complete the reference encounter successfully? If not, what else might you have done?

My patron told me she was satisfied with my answers and said she had a good basis to start off her research, though she wished I could have found more online resources. I think my results could have included more diverse items and more online resources if I had searched more creatively. The topic was so specific I felt limited to searches that included Winsor somehow. I think if I had broadened the scope of my initial search and narrowed it later I could have found more options for my patron that could have been more easily available to her.

11) Please reflect on what you learned about user services because of answering the patron’s question.

I learned that what my patron asks for and what is available through library resources will not always match. The library had a respectable number of titles available by Winsor, but only one provided information she needed. I found myself wishing she had asked me for historical writings by Winsor instead of writings about libraries because I had an easily available number of options for her on that front. However, these were all useless in this context and had to be ignored. I also had no luck whatsoever in finding the 1877 speech she mentioned, leading me to conclude that it was something the library simply didn’t have access to or even an example of misinformation.

Finally, I learned that my patron’s initial question can belie the patron’s information needs. Because Winsor’s own writings leaned heavily on the historical side, I could not provide my patron with more than one work by Winsor that covered her topic. Although her preference was for works by Winsor, the reality was that works by others were much more likely to cover the topic she wanted to learn about. Therefore, I had to adjust my patron’s expectations for her sources and explain the merits of works by authors other than Winsor. I think this was a much trickier question than either I or my patron expected it to be, and I had to adjust to the limits of the catalog as my search unfolded.