

A Survey of Genealogists at The Newberry Library

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Introduction

DURING THE PAST fifteen years, and particularly since the Bicentennial and the television showing of *Roots* in 1977, genealogists have become increasingly numerous and visible library users. Rather than ignoring them and hoping they will go away, librarians have, most commendably, been quite interested in attempting to find ways to cope with the requests and needs of this particular group of library users. Examples of this interest are very much in evidence. The 1978 *ALA Yearbook* devoted a major article to the subject of genealogy and libraries.¹ Special sessions at recent ALA meetings have dealt with genealogy, and an entire book has been written on the subject—J. Carlyle Parker's *Library Service for Genealogists*.² At the local level, genealogy workshops for librarians are quite popular and very well attended. Most of these meetings and articles have focused on methods for coping with genealogical queries, and determining what libraries can legitimately be expected to do for these patrons. These topics are clearly of concern to all libraries—from the small public library with a few how-to-do-it genealogy books, to a large genealogical research institution.

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Rationale for the Survey of Genealogists

One question that seems to have been overlooked in all this, however, is "Who are the people doing genealogical research in libraries today?". While most librarians who deal with genealogists have wondered about this question, it has received little serious study. A profile of genealogists was of particular interest to The Newberry Library, which houses one of the country's largest collections on genealogy and local history. Although thousands of people use the Newberry's collection each year, little was actually known about those individuals. It was felt that if the Newberry staff knew more about the interests, abilities and concerns of the genealogy readers (patrons at the Newberry are known as readers), they would be better able to assist those readers in making the best use of the library's collections and of their own time.

There were three specific areas in which it was thought that increased knowledge of genealogy readers would assist the Newberry's staff:

1. *Evaluating reference services.* The Local and Family History staff handles inquiries made at the reference desk, over the telephone, and through the mail. Were these inquiries being handled satisfactorily, or did the staff need to improve the methods by which it responded to genealogical queries? Was a change in emphasis needed? Given the small staff in Local and Family History Section, we wanted to be sure that those tasks that were being done were the ones that were most needed.
2. *Preparing for educational activities.* Each year Local and Family History sponsors, often in cooperation with a local genealogical society, a special all-day advanced genealogy program. From time to time adult education classes have also been offered by the library. By all accounts these programs have been quite successful, but a reader survey would enable us to learn whether or not readers wish to attend such programs, and what subjects they would find most useful and interesting. By knowing something of the ability levels of our readers, in terms of formal education and experience in genealogy, we could avoid planning programs either too elementary or too advanced for the majority of our potential audience.
3. *Improving orientation and reader access to the Local and Family History collection.* The Newberry is not an easy library to use. First-time users, whether beginners or experienced genealogists, must spend some time getting acquainted with the arrangement and organization of materials and the procedures used to locate and

Survey of Genealogists at The Newberry Library

obtain them. A certain amount of time spent on orientation is unavoidable, but we wondered whether things could be done to lessen the feeling of confusion and helplessness many first-time readers have.

One idea that the staff had seriously considered was the development of a brief (five- to ten-minute) self-operated, audiovisual introduction to genealogy at The Newberry Library. However, before going to the effort and expense of developing such a presentation, it seemed wise to determine whether readers thought such an introduction would be viewed. Although the library serves a few thousand first-time users each year, a significant number of readers use the library more than once. Another question to be answered was whether we were meeting the needs of people who had advanced beyond the beginner stage and would need to make more intensive use of the collections.

In addition to addressing these three concerns of the Local and Family History Section, it was thought that a profile of the Newberry's genealogy readers might have a broader significance. It would promote a more general awareness of the type of person doing genealogical work at the library, which would be useful for all Newberry staff members. It might also do something to alter some of the "little old lady in tennis shoes" stereotype with which genealogists are often saddled. The results of the survey would only illustrate the characteristics of genealogists who use The Newberry Library. There are no similar surveys available for comparison, so it cannot be determined whether genealogy readers at the Newberry are representative of genealogists as a whole, or even of genealogists who use libraries. Even so, it was thought that these findings would suggest certain characteristics which would be true of users of medium- and large-size genealogical library collections.

Genealogy at The Newberry Library

Before describing the survey and the sampling procedure used, a brief description of the Local and Family History Section, the Main Reading Room at the Newberry, and the procedures used to obtain books and other services is needed.

The Newberry Library is a private, independent research library in history and the humanities. Local and Family History, which makes up only one part of the Newberry's total holdings, contains approximately 150,000 volumes, plus several thousand reels of microfilm. The collection covers all parts of the United States, Canada and the British Isles,

but its particular strengths are the Midwest, New England, the states of the original thirteen colonies, and Great Britain. In 1981, 4840 genealogy reader cards were issued. Local and Family History tallied 10,920 reader days in 1981.

The Local and Family History Section consists of two full-time staff members: the Curator, and the Local and Family History reference librarian. Volunteers in the section work about fifteen to eighteen hours per week. The staff assists readers, answers telephone and mail queries, works on book selection and collection development, and undertakes special projects such as developing finding aids and reference tools.

The physical arrangement of the Newberry's Main Reading Room and bookstack building, the facilities available to aid readers, and the method by which the reading room is staffed, all affect how genealogists view the library in terms of ease of access to material and the availability of knowledgeable reference assistance. Genealogists work in the library's Main Reading Room, along with all other daily users, including college faculty members, students, and professional and lay researchers. There is no separate "Genealogy Reading Room" nor is there a separate card catalog for genealogy and local history. Cards for all books at the Newberry, regardless of subject, are filed in one dictionary catalog. The Newberry is a closed-stack library, and readers fill out request slips for books, which are paged from the new bookstack building, and brought to the reader's seat. The new bookstack, which is connected to the main building, is designed to provide the best possible environment for the Newberry's collections. The windowless building is temperature- and humidity-controlled, and since it is only used for storage, the need to make compromises between what is best for books and what is comfortable for people is eliminated. The stack building is ten stories tall and contains 173,000 linear feet or thirty-two miles of shelving.

One reference attendant is always on duty in the Main Reading Room. About half the time the reference attendant is a professional librarian, the other half, a paraprofessional. This person, in addition to aiding genealogists, must also answer telephone reference calls, do card catalog checks, and assist nongenealogist readers, long-term academic fellows, and library staff members. The reference post is covered by the Local and Family History Reference Librarian only a few hours each week. Reference attendants are trained to answer simple genealogical queries, and to refer questions they cannot answer to the Local and Family History staff, whose offices adjoin the Main Reading Room.

The Survey Methodology

This survey had two principal objectives: (1) to profile genealogical users of the Newberry with regard to demographic characteristics, as well as involvement with genealogy; and (2) to determine how these users view the services provided by the Newberry. In a recent article, Meredith Butler and Bonnie Gratch described the process of planning a library user study, and their procedure was used in organizing this study.³ In preparing this study, the library and genealogy literatures were surveyed. No previous surveys, such as the one we were contemplating, were found. Early in the formation of the study, it was decided that we should focus on the current Newberry readers, and leave other topics, such as the question of users versus nonusers and the evaluation of the collection, to later studies. The staff of the Newberry is presently more interested in providing better service to the genealogists who already use the library, rather than in greatly expanding that already large number. Although the evaluation of the genealogy collection was left for later study, some useful information on this subject was gleaned from the comments of those surveyed.

Keeping in mind the two principal objectives, a preliminary draft of the survey was prepared and distributed to selected Newberry staff members. They suggested several questions which were added to the survey. Several genealogists were also asked to comment on the survey to determine whether or not the questions and directions were clear, unambiguous and reasonably easy to answer, and whether or not they thought the survey was too long. In its final version, the survey numbered thirty-one questions, some with multiple parts. A place for comments was also included.

The survey could either have been distributed at the library, or mailed to Newberry genealogists. Handing out the survey at the library would have biased the sample in favor of frequent users of the library. This method was determined to be unsatisfactory, since one of the factors we wished to examine was whether frequent users require different levels or types of service than infrequent users. All persons using the Newberry must fill out a registration form with their name, address and the subject of their research. Different cards are issued for genealogical and nongenealogical users; these cards are valid for one year. A systematic sample was drawn from the 4840 genealogy registration forms completed in 1981. Every ninth form was pulled, so that 536 surveys were mailed. Thus, frequent and infrequent users had an equal chance of being included in the sample. Of the surveys mailed, 254 were returned. Four of these were unusable, leaving 250, or 46.6 percent of the

total number of surveys, which could be tabulated. The responses were analyzed using SPSS (Statistical Package for the Social Sciences).

Findings: A Profile of Newberry Genealogists

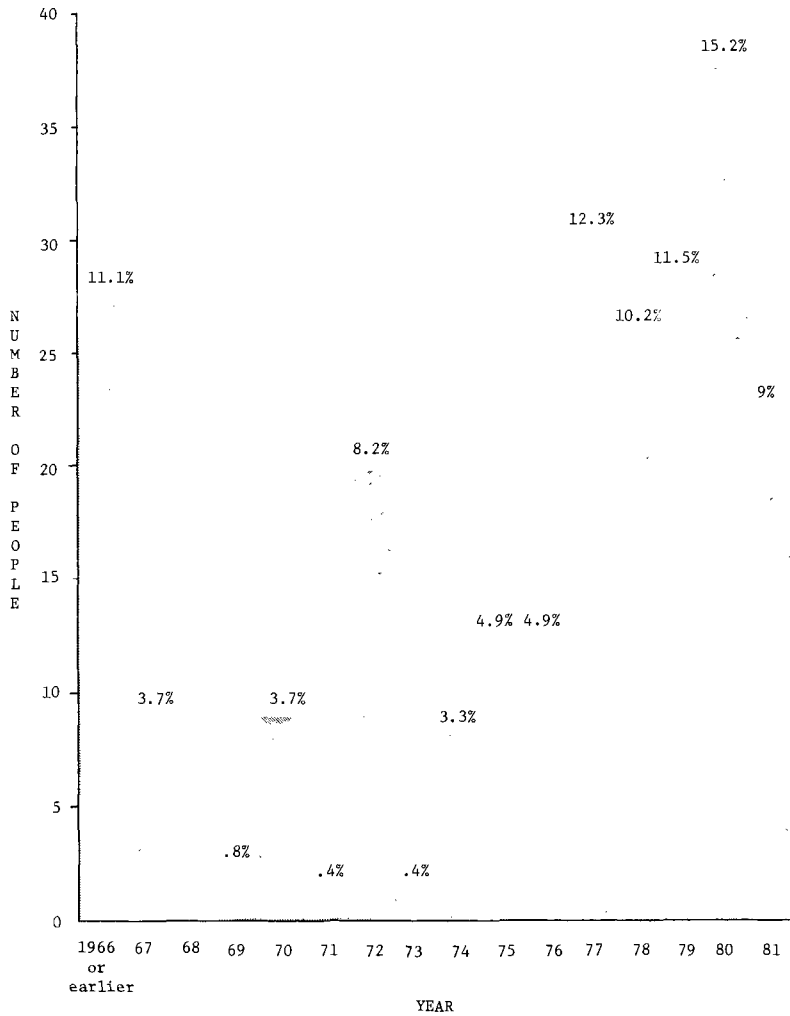
The myth that genealogists are overwhelmingly female and elderly seems clearly to be untrue. Females did outnumber males 58.6 percent to 41.4 percent in this survey, but this is hardly overwhelming. Readers ranged in age from fifteen to eighty-four (children are not admitted to the Newberry), with the average age being 47.9 years. There was no statistically significant difference in the average age of men and women in the sample.

We were curious to know whether the television showing of *Roots* and/or the Bicentennial were the catalysts that started people on their genealogical quests. Figure 1 indicates that the Bicentennial had little impact, but there was a sharp increase in the number of people who began their genealogical work in 1977 when *Roots* was first shown. Indeed, 1977 is the beginning of increased participation in genealogy that has continued to the present. Of the genealogists in the sample, 58.6 percent had begun their research since 1977.

We found that the vast majority of Newberry genealogists could be classified as casual hobbyists who find genealogical research interesting and fun, but who do not have a deep ongoing involvement with the subject. Attempts to organize genealogists have met with mixed results. Our survey suggests that many genealogists are highly independent and still work outside the mainstream of organized genealogy. The survey indicated that 93 percent have never presented a program on genealogy and 87.2 percent have never written any work of a genealogical nature, including family histories, periodical articles, indexes, or transcriptions of genealogical materials. Nearly half (47.6 percent) belonged to no genealogical society, 32 percent belonged to one or two. In the year prior to the survey, 62.8 percent attended no special genealogical programs.

One would expect a decrease in the number of respondents falling into each category measuring degree of involvement in genealogy toward the upper end of each scale. However, it was found that the number of respondents in the highest category for these questions was higher than the number in the intermediate categories. This "tail" includes: the 7 percent who have given presentations at genealogical conferences, the 12.8 percent who have published genealogical material, the 8 percent who belong to six or more genealogical societies, the 8.8 percent who attended three or more genealogical programs in the last

Survey of Genealogists at The Newberry Library



Percentage of Users and Years Genealogical Research was Begun at
The Newberry Library

year, and the 8 percent who have taught genealogy classes. This suggests there is a group, which seems to number about 10 percent of Newberry genealogy readers, who are extremely active in the field of genealogical research.

Our results on the average level of formal education were inconclusive. The respondent was to fill in the number of years of schooling completed. One-third of the surveys recorded figures between seventeen and twenty-two, which would mean the respondent had done one to six years of graduate work. While there are certainly people in the survey group who fall into this category, we think many people put down the age at which they left school, rather than the years of schooling they had completed. There is no way to determine from the surveys who did and did not answer the question correctly.

In order to get some sense of the minimum levels of education, a working assumption was made that all respondents reporting seventeen to twenty-two years of school were, in fact, reporting their age when they left school. Using this assumption, the values of seventeen to twenty-two were recoded—e.g., seventeen converted to eleven years of school, eighteen converted to twelve years of school. To the extent that there were people in the sample with some graduate education, the average amount of education indicated by this conservative interpretation of the data would be lower than is actually the case. Analysis of the recoded data shows that 26.6 percent of the respondents had college degrees, and another 31.4 percent had some college training. While Newberry genealogists may indeed have more schooling than this, it is probable that at least 58 percent of them have some college training.

Despite the emphasis in recent years on genealogical education, most genealogists using the Newberry are still self-taught. When asked to rate the importance of six methods of learning genealogical research techniques, 69.4 percent rated self-instruction as a very important means by which they learned genealogical research, and how-to-do-it books were rated very important by 25.5 percent. None of the other methods for learning genealogical research—from friends, a librarian, a class, or workshops—were rated very important by more than 20 percent of the respondents. Genealogy classes were considered to be of little or no importance to 69.1 percent of the respondents, and workshops or programs were of little or no importance to 63.8 percent of the respondents. This seems to indicate that education programs and classes have so far had little impact on genealogists. It is also clear that programs, classes and workshops are not of interest to all genealogists. When asked to indicate what kinds of programs would be of interest to them, 16 percent of the sample did not respond, probably indicating they were not interested in programs. The most popular subjects were those dealing with particular types of research sources (e.g., probate records, naturalizations, maps), which were of interest to 60.4 percent of those

Survey of Genealogists at The Newberry Library

surveyed, and programs on specific geographical areas of the United States, which were of interest to 53.6 percent. Of the respondents, 45 to 50 percent were interested in programs on research in foreign countries, history and historical background, and record keeping, computers, and publishing. Only 26 percent expressed interest in programs on ethnic, racial or religious groups. Programs, seminars and classes do serve an important educational function in genealogy, but they presently do not reach, or are not of interest to, many genealogists. They must be viewed as only one component in an educational process that might include such things as instructional books and articles and personal assistance offered to genealogists at institutions holding research materials.

The survey attempted to learn what types of institutions are most heavily used by genealogists, and respondents were asked to name the one institution they considered their primary resource for genealogical research. It appears to be very difficult for genealogists to single out one institution and suggests that they are very much aware that genealogical research draws on many different resources. The difficulty respondents had in naming a single institution as their primary resource is illustrated by the fact that 30.4 percent of them wrote down two or more institutions. In all, fifty-six different institutions were named as the primary resource for individuals' genealogical work. Survey respondents mentioned specific institutions 224 times, but only seven institutions were named three or more times. These were the Newberry, the National Archives and its branches, the Genealogical Department of the Church of Jesus Christ of Latter-day Saints and its branch library system, the Allen County Public Library in Fort Wayne (Indiana), the State Historical Society of Wisconsin, the State Historical Society of Iowa, and the New England Historic Genealogical Society. While these are all first-rate institutions, this list does not necessarily represent the seven best or most popular genealogical repositories in the country; obviously the sample is biased toward the Newberry and other Midwestern institutions. The distribution of other types of institutions was fairly even. In addition to the National Archives and the Latter-day Saints Genealogical Department, eighteen public libraries were listed, sixteen historical societies, ten state libraries or archives, five colleges or universities, plus five miscellaneous institutions. Clearly genealogists do not confine their research to a single institution or type of institution.

All thorough genealogists know that genealogical research involves much more than simply visiting libraries. Much work is done outside libraries, for example, at county record offices, cemeteries and through relatives. Much of this research involves correspondence. The

genealogists who use the Newberry write a surprisingly high number of letters per year. Relatives are the most frequent recipients of genealogical correspondence; followed by government offices and agencies; libraries, archives and historical societies; and last by other researchers. Of those responding, 37 percent write more than ten letters to relatives, 28 percent write ten or more to government agencies, and 20 percent write more than ten to libraries, archives and historical societies. While letters are written to other researchers (nonrelatives), there is less of this type of correspondence; 56 percent write such letters less than three times each year. It is important to keep in mind that not only do genealogists tend to use several libraries in their research, but also that they use many other institutions and sources of information.

In many public libraries today, genealogists are still considered to be nuisances who make unreasonable and time-consuming demands on the staff. We wished to learn how extensive this purported use is, and whether or not people who used public libraries for genealogical purposes also used libraries for nongenealogical purposes. Nearly half of the respondents (47.2 percent) use public libraries for nongenealogical purposes monthly or more frequently. Only 9.2 percent reported they never use their public library for nongenealogical purposes. Compared with the results of a 1978 Gallup poll which indicated that "more than half of all Americans age 18 or over have visited a public library within the last year," the respondents to this survey used their public libraries far more than the national average.⁴ While one-third (33.7 percent) of the respondents used their public libraries for genealogical purposes monthly or more frequently, two-thirds (66.3 percent) used them for genealogical purposes ten times a year or less. If this is true of genealogists as a whole, librarians and public libraries should treat genealogical queries not as annoyances, but as one type of use of libraries by a group of people who also make heavy use of public libraries for other purposes.

Genealogical Use of The Newberry Library

The 536 surveys were sent to people in thirty-four states and Canada. States with eight or more representatives were Illinois (374), Indiana (27), Michigan (15), Iowa (14), Wisconsin (14), Missouri (10), Florida (9), and California (8). The Newberry Library staff was not surprised to learn that 52.8 percent of the library's genealogy readers live within fifty miles of the library. This area encompasses Chicago and its suburbs, northwest Indiana and southeastern Wisconsin. Although we

Survey of Genealogists at The Newberry Library

know the Newberry enjoys a national reputation among genealogists and is conveniently located along several major travel routes, we were still surprised to learn of the large number of users who live a considerable distance from the library. Of the readers surveyed, 22.8 percent reported living over 300 miles away. Although they would certainly account for less than 22.8 percent of the reader days, we now definitely know that the Newberry does serve a national clientele.

Because staff members become acquainted with frequent users of the library, there is a tendency to think frequent users represent a larger portion of the total readership than they in fact do. Only 8.2 percent use the Newberry twice a month or more. Frequent readers—whom we define as those who use the Newberry five or more times a year—make up 23.3 percent of the total respondents; 46.9 percent use the library one to four times each year; and 29.8 percent had only used the Newberry once. For most Newberry readers, a trip to the library is not a regular activity.

In general, readers were satisfied with the reference services provided for them: 69.2 percent rated the service good or very good, 14.8 percent fair, 4.8 percent rated it poor, and 11.2 percent either did not know or did not answer. When a tally of written comments was made, compliments outweighed complaints five to one. Although frequent users represent less than one-quarter of Newberry genealogists, the staff wanted to know if their evaluation of reference services was different from those of infrequent users. Frequent users do appear to find the service at least satisfactory. None rated it poor, although slightly fewer (63.6 percent) rated it good or very good compared with the total sample. Infrequent users offered a more extreme range of opinions. Higher percentages of infrequent users rated the service both poor (6 percent) and good to very good (72.8 percent) than the total sample. This may indicate the wide range of experience found among infrequent users who can range from the very experienced out-of-town genealogist who only comes to Chicago once a year, to the complete novice who comes to the library totally unprepared.

The idea of supplementing reference service with a brief audiovisual introduction to genealogy at the Newberry was well received by genealogists: 82.4 percent thought first-time users would be likely to view such a presentation, and 90 percent indicated they would personally like to view such a presentation. There was even strong sentiment for requiring first-time library users to view the presentation, with 58.8 percent saying it should be required, and 22.4 percent saying it should not.

Mail and telephone reference are major activities of the Local and Family History staff, and genealogists' opinions of these services are of interest to us. We found that the overwhelming majority of Newberry genealogists had never written or telephoned us. Of the 17.6 percent of the respondents who had telephoned, 88.6 percent thought the response was good or very good. Of the 11.6 percent who had written, 79.3 percent rated the reply good or very good. While these figures are encouraging to the Local and Family History staff, the sample size was too small to make any conclusive statements.

Conclusion

For the majority of genealogists using The Newberry Library, genealogy is an avocation, although there is a core of very involved people working in the field. For the most part, genealogists are infrequent users of the Newberry but appear to be interested in learning to make better use of the facilities. Despite efforts to draw genealogists into organized activities, genealogists today are still highly independent. And although genealogists appear to be quite well educated, efforts to help them increase their knowledge of genealogy must take several forms.

After studying the survey results, the Local and Family History staff at the Newberry can see several areas that warrant attention. Although most readers expressed satisfaction with the reference service, more thought should be given to serving the needs of infrequent users. An audiovisual introduction would be very helpful in acquainting readers with the library and freeing reference staff to deal with more specific questions. In addition, we believe serious thought should be given to preparing a detailed, in-depth guide to the Local and Family History collection. This might even take the form of a publication which would be available to libraries and individuals. Genealogists could then begin their orientation before they come to the library. Such a work would be of use to both experienced and inexperienced genealogists, and frequent and infrequent readers. Many readers realize that they are not fully exploiting the collection, and information gleaned from such a guide would provide them with additional research possibilities.

Educational programs should continue at the Newberry, but we must be aware of the limited audience for adult education classes and special programs. We now do have a better idea of the program topics that most appeal to genealogists. Perhaps the most important thing we learned was that genealogists are a diverse lot and cannot be neatly

Survey of Genealogists at The Newberry Library

described and packaged. Genealogy attracts all kinds of people with different degrees of interest and different needs. As librarians we need to resist the temptation to treat all genealogists as if they were cast from the same mold, and rather treat each of them as individuals.

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