

# PNLA QUARTERLY

THE OFFICIAL PUBLICATION OF THE PACIFIC NORTHWEST LIBRARY ASSOCIATION

68:3 Spring 2004

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## Into the West



# pnla 2003/2004 officers and chairs

## executive board

### President

Mary DeWalt  
Ada Community Library  
10664 W. Victory Rd.  
Boise, ID 83709  
208.362.0181  
mdewalt@adalib.org

### First VP / Pres. Elect

Jan Zauha  
The Libraries  
Montana State University-  
Bozeman  
P.O. Box 173320  
Bozeman, MT 59717-3320  
(406) 994-6554  
FAX (406) 994-2851  
alijz@montana.edu

### Past President

Daniel Masoni  
Unalaska Public Library  
PO Box 610  
Unalaska, AK 99685  
907.581.5060  
FAX 907.581.5266  
akunak@ci.unalaska.ak.us

### Second VP / Membership

Christine Sheppard  
Library Association of  
Alberta  
80 Baker Crescent NW  
Calgary, AB T2L 1R4  
403.284.5818  
FAX 403.282.6646  
shepparc@cadvision.com

### Treasurer

Kay Vyhnanek  
Holland/New Library  
Washington State  
University  
Pullman, WA 99164-5610  
509.335.5517  
FAX 509.335.0934  
kayv@wsu.edu

### Secretary

Carolynn Avery  
Oregon State Library  
250 Winter St. NE  
Salem, OR 97310  
503.378.4243, ext. 269  
averyc@pioneer.net

## state/provincial representatives

### Alaska

Charlotte Glover  
Ketchikan Public Library  
629 Dock St.  
Ketchikan, Ak 99901  
907.225.0370  
FAX 907.225.0153  
charg@firstcitylibraries.org

### Alberta

Myra Skaronski  
Edmonton Public Library  
Lessard Branch  
6104-172 St.  
Edmonton, Alberta T6M 1G9.  
780.496.7078  
mskaronski@epl.ca

### British Columbia

Diana Guinn  
Chief Librarian  
Port Moody Public Library  
100 NewPort Drive  
Port Moody, BC  
V3H 3E1  
604-469-4580  
F 604.469-4576  
Diana.Guinn@cityofportmoo-  
dy.com

### Idaho

### Montana

Norma Glock  
Middle School Librarian  
415 North 3rd Street  
Columbus, MT 59019  
(406) 322-5375  
P. O. Box 871  
Columbus, MT 59019  
nglock@mcn.net

### Oregon

Carol Reich  
Hillsboro Public Library  
3825 NE Azalea St.,  
Hillsboro, OR 97124  
503.615.6505  
FAX 503.615.6501  
carolr@ci.hillsboro.or.us

### Washington

Patience Rogge  
696 Woodland Drive  
Port Townsend, WA 98368  
360.385.6975  
rogge@macaid.com

## committees

### Bibliography

(inactive)  
Gloria Ostrander-Dykstra  
Boise State University  
910 University Drive  
Boise, ID 83725  
208.385.3650  
gostrand@boisestate.edu

### Elections

Carolynn Avery  
Oregon State Library  
250 Winter St. NE  
Salem, OR 97310  
503.378.4243, ext. 269  
averyc@pioneer.net

### Intellectual Freedom

TBA

### Nominations

Susannah Price  
Boise Public Library  
7715 Capitol Blvd.  
Boise, ID 83702  
208.384.4026  
FAX 208.384.4156  
sprice@cityofboise.org

### Young Reader's Choice Award

Carole Monlux  
Paxson Elementary School  
101 Evans  
Missoula, MT 59801  
406.542.4055  
monlux@montana.com

### Webmaster

Linda Frederiksen  
Access Services Librarian  
Washington State  
University Vancouver  
Vancouver, WA  
frederik@vancouver.wsu.  
edu

### Electronic List Manager

Lenora Oftedahl  
StreamNet Library  
Columbia River Inter-Tribal  
Fish Commission  
190-729 NE Oregon St.  
Portland, OR 97232-2701  
503.731.1304  
FAX 503.731.1260  
oftl@critfc.org

### PNLA Quarterly Editor Publications

Mary K. Bolin  
319 Love Library  
PO Box 884100  
13th & R Streets  
University of Nebraska-Lincoln  
Lincoln NE 68588-4100  
402.472.4281  
mbolin2@unl.edu

### Send all Quarterly mail to:

PNLA Quarterly  
Mary K. Bolin  
319 Love Library  
PO Box 884100  
13th & R Streets  
University of Nebraska-Lincoln  
Lincoln NE 68588-4100

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at [www.pnla.org](http://www.pnla.org)

To post a message to  
the PNLA list, send  
your message to  
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THE OFFICIAL PUBLICATION OF THE PACIFIC NORTHWEST LIBRARY ASSOCIATION

# PNLA QUARTERLY

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PNLA Quarterly Editor  
Mary K. Bolin  
319 Love Library  
PO Box 884100  
13th & R Streets  
University of Nebraska-Lincoln  
Lincoln NE 68588-4100  
USA

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ALA-H.W. Wilson Library Periodical Award Winner: 1964, 1974, 1993.

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## President's Message

MARY DEWALT



## MISSION

*The Pacific Northwest Library Association is an organization of people who work in, with, and for libraries. Its mission is to facilitate and encourage communication, networking, and information exchange for the development and support of libraries and librarianship in the Pacific Northwest.*

**I**'m back in Boise after a very productive PLA conference in Seattle. It was good to meet colleagues from around the country and very good to see many PNLA members in that crowd. Once I dig myself out from under piles of mail and messages, and answer the questions staff have been saving up for days, I'll transcribe my notes from superb sessions, further examine exhibit loot, and begin to formulate a plan of action based on new (or reinforced) information. Before my staff and I left for the conference, after splitting the sessions between us, I had two main suggestions: enjoy the conference experience on a whole and return with one action item for our library. I wanted to leave it open, no other requirements or pressures (well, okay, there is that teeny conference summary report each attendee needs to write). Imagine how pleased I was to discover that staff (both green and seasoned, mind you) found themselves simply unable to limit themselves to just one idea (my secret hope, of course). I'd catch them in the conference halls, meet them for dinner or an event, and find them brimming with ideas for our collection and programming, with suggestions to modify procedures and, best of all, with ways to effortlessly increase our already high level of quality public service. Here's hoping their enthusiasm is contagious now that we've returned.

Conferences are amazing things. Beyond simply providing solutions, a good conference inspires and excites. It serves to reignite your passion and reinforce all the reasons you became a library professional.

While PLA is designed for public librarians, PNLA is for everyone. PNLA encourages interaction within and between all fields of librarianship. I encourage everyone to become an active member of PNLA and participate in PNLA's annual conference, this year in Wenatchee, Washington, August 11-14. 2004 is a special year for PNLA as we are hosting a joint conference with the Washington Library Association, making it twice as lively and twice as informative. This year's committee has sessions planned that are sure to inspire those big hairy audacious goals yet also provide targeted practical solutions to everyday problems. Here's hoping you and your staff return from Wenatchee with fresh ideas, raring and ready to serve your students, your clientele, or your community. ■

## From the Editor

MARY K. BOLIN

**G**reetings from Nebraska! It's a cold, rainy March day, and I'm happy to be back in my home state, although it was really hard to leave Idaho after spending seventeen happy years there. I'm so happy to be able to maintain a tie to the Northwest by editing the *Quarterly*. Enjoy this issue, it's full of excellent and interesting things, from Molly Gloss to patents and trademarks to virtual reference. ■

# 2005 YRCA TITLES ANNOUNCED

The Young Reader's Choice Award Committee has completed its selection of titles for the 2005 ballot. Those titles that have been selected for the junior list for grades four through six are:

THE RUNT by Marion Dane Bauer  
THE BELOVED DEARLY by Doug Cooney  
THE SECRET LIFE OF OWEN SKYE by Alan Cumyn  
THIEF LORD by Cornelia Funke  
HOOT by Carl Hiaasen  
SAFFY'S ANGEL by Hilary McKay  
CAMP X by Eric Walters

Titles on the list for the middle division of the award, which includes grades seven through nine, are:

CRISPIN by Avi  
STRAVAGANZA: CITY OF MASKS by Mary Hoffman  
SEARCH OF THE MOON KING'S DAUGHTER by Linda Holeman  
SON OF THE MOB by Gordon Korman

SAME STUFF AS STARS by Katherine Paterson  
A DANCE OF SISTERS by Tracey Porter  
SURVIVING THE APPLEWHITES by Stephanie Tolan  
HEIR APPARENT by Vivian Vande Velde

Senior division titles on the 2005 list are:

CATALYST by Laurie Anderson  
FIRST FRENCH KISS: AND OTHER TRAUMAS by Adam Bagdasarian  
HANGING ON TO MAX by Margaret Bechard  
HOUSE OF THE SCORPION by Nancy Farmer  
WHAT HAPPENED TO LANI GARVER by Carol Plum-Ucci

Further information about the YRCA Award can be found at the PNLA web site.

Carole Monlux  
YRCA Chair ■

## Call For Submissions

*All contributors are required to include a short, 100-word biography and mailing address with their submissions. Each contributor receives a complimentary copy of the issue in which his/her article appears.*

Submit feature articles of 1,000-6,000 words on any topic in librarianship or a related field.

We are always looking for short, 400-500 word descriptions of great ideas in libraries. If you have a new project or innovative way of delivering service that you think others might learn from, please submit it.

**Summer 2004 Issue (Deadline June 1, 2004):**  
**Fall 2004 Issue (Deadline September 1, 2004):**

There are no themes for these issues. Please submit any articles or items of interest.

Please email submissions to [mbolin2@unl.edu](mailto:mbolin2@unl.edu) in rtf or doc format.

## Submission Guidelines

### Format

Please submit all documents as either a .doc or an .rtf

### Font style

PNLA Quarterly publishes in the Verdana font, size 8.

### Spacing and punctuation:

- Please use a single space after a period.
- Please use full double dashes (i.e., "--" not "--")
- Please place punctuation within the quotation marks.
- Please omit <http://> when quoting Web site addresses
- Please place titles within text in italics (not underlined).

- Please do not capitalize nouns such as "librarian" unless the word is included in a title.

### Spelling

Web site, Internet, email, ILL; please use the spelling conventions of your country.

### Citation Style

Please use whatever style you wish, as long as it is used consistently.

### Additional Information

Please submit a 100-word biography and postal address with article.

# Meet Molly Gloss

GAIL Z. ECKWRIGHT

Molly Gloss was born and raised in Portland, Oregon, a fourth generation Oregonian on her mother's side of the family (*BookSense.com*, screen 1). Her father, a Texan who worked for the railroads, was an avid fan of the Western genre novel (Beckham 301). Gloss grew up spending memorable hours alongside her father in local libraries, reading every available Western book. These were Westerns with a big "W," stories of the Old West with the mythology still intact. But by the time she was a teenager, she had begun looking for more substantial Western literature. She no longer enjoyed imagining being a male hero in Old West novels, and she trolled the libraries and bookstores until she found another kind of western:

[T]here were Westerns that weren't kept on the shelves where my Dad stood, though they were Westerns all right – I knew them when I saw them. *The Virginian*. *The Ox-Bow Incident*. *The Wonderful Country*. A.B. Guthrie's books, *The Big Sky* and *The Way West*. *Honey in the Horn*. *Trask*. [...] I gave up pulp westerns immediately on discovering these others. (Beckham 302)

Gloss quickly consumed these books and continued her quest for more, which eventually led her to her now-favorite author, Willa Cather (303). By this time Gloss was married and in her twenties, no longer interested in "pretending I was a man" (303). She found Cather's books to be beautiful literary Westerns, always incorporating "landscape and the human response to that landscape" (*BookSense.com* [2], screen 1). While searching for yet more Westerns, she happened upon a collection of "women and the west" stories edited by Vicki Piekarski. *Westward the Women* revealed a cadre of female western authors new to Gloss, including Dorothy Johnson, Mary Austin and Mary Hallock Foote, "And finally I was reading my old favorite genre again, but in a woman's voice" (Beckham 303). Gloss eagerly read the works of these newly discovered female authors, although she found the books

old fashioned, most of them, and often terribly romantic; they were as clichéd in their way as the men's books [...] but in them, along with, always, the strong male hero and continuous life-threatening conflict, I very often found a woman I could pretend to be. Usually she was independent, or she'd rejected civilization for the freedom of the frontier, or she held her men up with her unshaken strength. (304)

She felt as though she had discovered "a lost genre, the 'woman's western'" (304). Gloss now realized that many women had authored Westerns, and she began to consider the possibility of writing a "big-W Western" with "a woman holding up the center [...]. She'd do the same things the men heroes did" (304).

Gloss's writing career began somewhat serendipitously when she was 29 years old. She had graduated from Portland State University in 1966 with a degree in social science and English and had briefly taught junior high school which she "absolutely hated" (Frederick 36). She took a job as a correspondence clerk at a Portland area freight company, but when her son was born she decided to take time off from work until he entered kindergarten. Consumed by the demands of mothering a colicky child and suffering from postpartum depression, Gloss began writing a "desperate journal" which gradually led her to writing short "fictional anecdotes, little bits and pieces of things" (*BookSense.com* [2], screen 4). The fictional anecdotes grew into stories about women finding ways to cope with ordinary though often-difficult life situations. These earliest writings were Westerns, because "People always say you should stick to writing about what you know [...] I took that to mean I could write Westerns, because I'd read so many of them" (Morris, *Talking* 127).

Gail Z. Eckwright is Humanities Librarian and Associate Professor at the University of Idaho Library in Moscow, Idaho. She is one of the founders of the electronic journal *Library Philosophy and Practice* and received an MA in English from the University of Idaho in 2003. She can be reached at [gze@uidaho.edu](mailto:gze@uidaho.edu).

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# Patents and Trademarks @ your Northwest PTDL

KAREN HERTEL

**P**atents and trademarks document the creativity and ingenuity of the American people, creating an invaluable record of technological and entrepreneurial progress. As bodies of literature, the collections of U.S. patents and federally registered trademarks are a unique resource of great value to our patrons. A 1977 study by the Patent and Trademark Office showed "84 percent or about 8 of every 10 patents, contain technical information not reported elsewhere in the non-patent literature" (38). Chemical Abstracts Service recently noted "that more than 50 percent of the organic and inorganic chemical substances recorded in the CAS Chemical Registry System during 2002 were derived from patent documents as opposed to journal literature and other publications" (Ashling 39). Likewise, the trademark collection stands as a distinctive resource, forming a visually descriptive record of goods and services, full of symbols evocative of American culture.

## PTDL Services

In 1871, Patent Depository Libraries (PDL) were established to serve as repositories for copies of printed-paper patents. With the addition of trademarks to the depository program in 1991 the PDLs became Patent and Trademark Depository Libraries (PTDL).

Today, the Patent and Trademark Depository Library Program (PTDLP) consists of a network of 86 public, state, and academic libraries. The mission of the PTDLP has grown from that of repository to a multi-faceted role including:

- Maintaining and providing free public access to all depository materials
- Providing assistance to users of patent and trademark information
- Promoting the use of patent and trademark information.

The formal agreement between the PTDL and the U.S. Patent and Trademark Office (USPTO) includes the provision that each PTDL send a representative to the week-long, annual training seminar. USPTO's Martha Crockett Sneed explains that "While a non-PTDL library may have patent and trademark materials obtained through other sources, a PTDL is mandated to provide high-level reference service by virtue of its depository association with the USPTO. 'The buck stops here' is the intended motto for a PTDL" (63).

Not surprisingly, to the uninitiated, searching for patent and trademark information can be an overwhelming task. Inquiries from users of patent and trademark information run the gamut, requiring varying degrees of expertise to answer. Staff at non-PTDL libraries can certainly answer some types of questions by gaining a degree of familiarity with a select array of free online resources. For example, the USPTO patent database indexes bibliographic data such as inventor name, inventor city, and patent number, making it easy for users with fairly straightforward searches to retrieve a patent document for patents issued from 1976 to the present. Likewise, the trademark database, containing more than 3 million pending, registered, and dead federal trademarks, includes a number of search fields. Until quite recently, free foreign patent information was difficult, if not impossible, for the non-expert to locate. In 1998, the European Patent Office launched the Esp@cenet databases, a goldmine of foreign patent information containing abstracts, as well as some full-image documents.

The abovementioned online databases can often be used to successfully answer inquiries such as:

- I need a copy of U.S. patent 5,631,026
- My uncle, John Doe, patented a tractor improvement in the 1980's. I'm trying to find a copy of the patent.
- There is a reference to a Japanese patent in this article that has a

*cont.*

Karen Hertel, assistant professor and reference librarian, University of Idaho Library, finds working with patents and trademarks fascinating. She has been the Patent and Trademark Librarian at the UI Library since 2002. Most of the patrons she assists are independent inventors from the surrounding area, but she also offers sessions on patentability searching to university students working on design projects in a variety of disciplines. She can be reached at [karenh@uidaho.edu](mailto:karenh@uidaho.edu).

## Patents and Trademarks @ your Northwest PTDL - cont.

number "JP 2003211475." I need to find out what that patent is about.

- What does the Cream of Wheat trademark look like? When was it first used in commerce?

Other types of patent and trademark question are more complex and should be referred to the closest PTDL. A novice searcher, attempting to do a patentability, or prior-art, search, is likely to make the mistake of conducting a keyword search of the USPTO's patent database. This is problematic for several reasons: first, the database is only text searchable back to 1976; second, the language of the patents is often "patentees" and may not contain the keyword(s) used by the searcher. To effectively do a prior-art search one needs to understand and utilize the U. S. patent classification system.

A patent serves as one form of prior art and the information disclosed in the patent may block others from receiving a patent.

Reference assistance of the type required for a patentability search must be designed to educate the individual researcher in the process, who must in turn conduct a self-directed patentability search. Patent and trademark librarian, Kevin Harwell, cautions, "A patron who asks whether his invention can be patented may be shown how to search patents and general information about patentability. However, for library staff to conduct a search and produce a list of patents, or even a list of patent classifications, in response to a patron's general inquiry about patentability would be the unauthorized practice of law" (34). A PTDL librarian can avoid this conflict by demonstrating resources using generic examples that are unrelated to the patron's information need. Harwell notes, "Librarians and staff who provide too much assistance, whose suggestions for research strategy and the conclusions drawn from them are too closely intertwined, may discover that patrons develop an inappropriate perception of the reliability of search results" (32). The same caveat holds true in reference to patrons conducting a trademark search with the goal of discovering potential conflicts between a proposed mark and an existing one.

A rather simplistic, but generally workable, way to differentiate between appropriate and non-appropriate reference service is to divide patent and trademark patrons with a request that specifies "a patent number, a patent classification, a section of the statutes, or some other material to which the patron has a direct reference" (Harwell 34) from those seeking advice as to the patentability of an invention, a recommended patent or trademark attorney, the likelihood of confusion of a proposed trademark, or the referral to and filling out of various patent or trademark forms.

### Pacific Northwest PTDLS

Each of the states in the Pacific Northwest region covering Alaska, Washington, Oregon, Idaho, and Montana is fortunate enough to have a PTDL. Nonetheless, this is a vast geographic region and it is not unusual for patrons to travel a great distance to use the services of a PTDL. For example, in

my PTDL at the University of Idaho Library in Moscow I often help patrons who have traveled one to two hundred miles. It's always recommended that patrons needing instruction in prior art searching call ahead; as there may be only one librarian at a PTDL trained to offer that type of assistance.

The collection at each PTDL includes utility patents from 1790 to present, design patents from 1842 to present, and plant patents from 1930 to present, all in a variety of formats; patent applications published since March 15, 2001 on DVD-ROM; pending, registered and dead trademarks from 1870 on CD-ROM; *Official Gazettes* in a variety of formats; print and electronic search tools including the CASSIS2 database, a CD/DVD-ROM system; and an assortment of other publications related to patents and trademarks.

Contact information for each PTDL is listed below:

*Library:* Anchorage Municipal Libraries, Anchorage, Alaska  
*Telephone:* 907 562-7323  
*Web Address:* [lexicon.ci.anchorage.ak.us](http://lexicon.ci.anchorage.ak.us)  
*Email:* "Ask a Librarian" from webpage  
*Contact Person:* Robert Williams, or any reference librarian

*Library:* University of Idaho Library, Moscow, Idaho  
*Telephone:* 208 885-6584 (reference) or 208 885-5858 (Karen Hertel)  
*Web Address:* [www.lib.uidaho.edu/](http://www.lib.uidaho.edu/)  
*Email:* Karen Hertel: [karenh@uidaho.edu](mailto:karenh@uidaho.edu)  
*Contact Person:* Karen Hertel, or any reference librarian  
*Other:* Prior-art search instruction by appointment only

*Library:* Montana Tech Library, Butte, Montana  
*Telephone:* 406 496-4281 (library) or 406 496-4523 (Betsy Harper)  
*Web Address:* [www.mtech.edu/library/ip.htm](http://www.mtech.edu/library/ip.htm)  
*Email:* Betsy Harper: [eharper@mtech.edu](mailto:eharper@mtech.edu)  
*Contact Person:* Betsy Harper, or any reference librarian  
*Other:* Appointments recommended

*Library:* Paul L. Boley Law Library, Portland, Oregon  
*Telephone:* 503 768-6786  
*Web Address:* [www.lclark.edu/~lawlib/ptointro.html](http://www.lclark.edu/~lawlib/ptointro.html)  
*Email:* [lawlib@lclark.edu](mailto:lawlib@lclark.edu)  
*Contact Person:* Seneca Gray, or any reference librarian

*Library:* Engineering Library, University of Washington, Seattle, Washington  
*Telephone:* 206 543-0740 or 206 543-0741 (reference)  
*Web Address:* [www.lib.washington.edu/engineering/](http://www.lib.washington.edu/engineering/)  
*Email:* [englib@u.washington.edu](mailto:englib@u.washington.edu)  
*Contact Person:* Christina Byrne, or any reference librarian  
*Other:* Usually two "Introduction to Patent Searching" classes are offered each academic quarter. Announcements concerning library classes are listed on Web site under "Classes and Instruction."

*Reference assistance of the type required for a patentability search must be designed to educate the individual researcher in the process, who must in turn conduct a self-directed patentability search.*

## Patents and Trademarks @ your Northwest PTDL - cont.

### Online Patent & Trademark Resources

The following online resources should prove helpful to non-PTDL libraries that wish to provide some basic reference service in the area of patents and trademarks. In addition, many PTDL Web sites include helpful information on patents and trademarks, including links to recommended Internet resources.

#### Basic Facts About Trademarks

URL: [www.uspto.gov/web/offices/tac/doc/basic/](http://www.uspto.gov/web/offices/tac/doc/basic/)

A short, non-technical guide published by the USPTO that gives basic information about trademarks and explains how to register a trademark.

#### Esp@cenet

URL: [ep.espacenet.com/](http://ep.espacenet.com/)

Access to the bibliographic data of over 45 million patents published by any member state of the European Patent Organization, WIPO (World Intellectual Property Organization), and the European Patent Office.

#### General Information Concerning Patents

URL: [www.uspto.gov/web/offices/pac/doc/general/index.html#ptsc](http://www.uspto.gov/web/offices/pac/doc/general/index.html#ptsc)

A short, non-technical guide published by the USPTO that gives basic information about patents and the filing process.

#### PTDLA: Patent and Trademark Depository Library Association

URL: [www.ptdla.org/](http://www.ptdla.org/)

Information about PTDLs nationwide. The "Online Patent and Trademark Resources" section contains links to many useful Web sites including inventor information, patent databases, and trademark databases.

#### Registered Attorneys and Agents Search

URL: [www.uspto.gov/web/offices/dcom/olia/oed/roster/index.html](http://www.uspto.gov/web/offices/dcom/olia/oed/roster/index.html)

An index, searchable by name or browseable by geographic region, that includes contact information for attorneys and agents with licenses to practice before the US Patent and Trademark Office.

#### United States Patent and Trademark Office

URL: [www.uspto.gov/](http://www.uspto.gov/)

Includes the online patent and trademark databases, as well as a vast amount of other information. The *Issued Patents (PatFT)* database contains the full-text of U.S. patents issued since 1976 and full-page images since 1790, the date of the first U.S. patent. The *Published Applications (AppFT)* database contains the full-text, as well as the full-page images of all U.S. patent applications published since March 15, 2001. It is necessary to download a Tiff viewer to access the patent images. Instructions for doing so are on the patent search page.

The *Trademark Electronic Search System (TESS)* contains more than 3 million pending, registered and dead federal trademarks.

### Works Cited

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# What Libraries Do Best: Bringing Warmth to Virtual Reference

BRENT ROBERTS

Happiness is a hard master—particularly other people's happiness.  
Mustapha Mond, *Brave New World*

Not all changes in the world are for the worst.

Jose Saramago, *All the Names*

The latest technological development to be co-opted by librarians for their evil purposes is live, real-time chat only instead of confabulating about Britney Spears, *The Simpsons*, and other such popular chat topics, we aim to employ the technology to solve our patrons' problems and answer their burning questions. We have even anointed this information-seeking chat behavior with a library designation: "Virtual Reference," aka the now-ubiquitous "Ask-a-Librarian" service. Libraries are diving head-first into digital reference services, from smaller institutions to statewide projects (see, for example, Linda Frederiksen's article about Washington State's virtual reference project in the Spring 2003 *PNLA Quarterly*). As we have experimented with synchronous electronic reference services at Montana State University-Billings, we have learned a few things that may be helpful for other smaller libraries who are easing into this service.

## Live Reference at MSU-Billings

Beginning in Fall 2002, the MSU-Billings Library ([www.msubillings.edu/library](http://www.msubillings.edu/library)) has partnered with Rocky Mountain College's Paul M. Adams Memorial Library ([library.rocky.edu](http://library.rocky.edu)), also located in Billings, to provide virtual reference services using LiveAssistance ([www.liveassistance.com](http://www.liveassistance.com)). Librarians at both institutions trade off occupying the single "seat" for a combined total of 28 hours each week.

LiveAssistance is a relatively uncomplicated, noninvasive platform. The student end offers a simple window in which patrons type their questions and see librarian responses. The librarian side has an input box for responding to the patron, under which there are buttons for Chat (essentially, sending the response), Open URL ("pushing" a Web site, or forcing a new browser window to open on the patron end), and Close (for eliminating sites that have already been "pushed"). There is a "Knowledge Base" button, which is a location for keeping useful links that regularly come in handy. Finally, there are "Pre-Defined Quotes," where you can add canned phrases ("Welcome to the Virtual Reference Desk. How may I help you?"). These can help speed things up in the heat of a reference exchange.

There are some clunky aspects of the LiveAssistance product. For one, when the module is opened but a librarian has not yet logged in, an annoying klaxon alarm goes off every few seconds. For another, the primary method for notifying the librarian that a patron has a question is an ominous deep voice that says, "Incoming chat request." The librarian on duty then has about a minute to enter the chat before the system gives the patron the option of sending an email to the library. This audio component to the platform can earn the librarian arched eyebrows and caustic glances when doing virtual reference in a public area.

## What We Do Best: Warmth

Though our virtual reference service is fairly new and has not been subjected to extensive review and analysis, there are several issues that have already emerged.

Most importantly, when climbing into the Virtual Reference Desk, we have to remember what it is that librarians do best: We create a warm, open atmosphere where patrons feel that they can ask questions and find answers. Yes, it is true that we enjoy the thrill of the hunt and leaving patrons totally satisfied with the *exact* material they were looking for. But in the end, what creates patron satisfaction is not necessarily whether the question has been fully answered, but that "the librarian has given

Brent Roberts (MLIS, University of Washington, 1999) has been a Reference/Instruction Librarian at the Montana State University-Billings Library since 2000. His greatest joy comes from being recognized as "the Library Man" by restaurant workers and part-time store clerks throughout the Billings metro area. When not changing lives at the Temple of Knowledge, he enjoys reading Japanese mystery novels and watching movies about talking animals with his small children. He can be reached at [broberts@msubillings.edu](mailto:broberts@msubillings.edu).

undivided attention and provided competent services" (Jennerich & Jennerich 1997, p. 10).

Deprived of physical cues, it becomes imperative in the virtual world that we work even harder to create "warmth" and convince patrons that a *real* (not a virtual!) person is waiting to help them (Pace 2003, p. 55). The suggestions that follow are designed to develop "warmth" at the virtual reference desk.

## Greetings

In a live interaction, it would be unthinkable to glower at a patron and greet them with a cold, curt "Yes?" Likewise, online interactions should not be so terse and dry. It only takes an extra second or two to type, "Welcome to the Reference Desk. How can I help you?" Supplying a name ("My name is Brent. What can I do for you?") can also go a long way toward creating warmth, as it emphasizes that there is a *real* person here.

## Slow Down

Somehow, when the deep voice of LiveAssistance announces an "incoming chat request," the need seems more urgent than when a patron appears at the Reference Desk and announces that they have a question. The pressure is on. But no one is going to be helped if you are in such a rush to keep things moving that you mis-type a URL or send off the first thing you find from a Google search. Don't be caught making simple mistakes because you are too frantic to get something anything out there in the space between you and your patron.

## Ask Questions

As mentioned above, once the chat has been initiated, there is something more immediate, more nerve-wracking about virtual as opposed to live reference. Especially for virtual reference newbies, there may be an urge to find the answer to the question as swiftly as possible without further questioning. But wait—what was it that we learned in library school? Didn't you ever play reference role-play games where the "patron" asked for books on butterflies but really wanted journal articles on prostate cancer, and would only reveal this real need after being asked several layers of appropriate and sensitive questions by the "librarian"?

The same truth should apply in the virtual world. Patrons may or may not ask right off for the information they need. Perhaps it comes as a result of not knowing who is on the other end of the chat, or a fear that a librarian won't really know how to navigate the online environment. Whatever the reason, some simple open-ended questions can help clarify the question and sharpen your ability to answer effectively. Jennerich and Jennerich (1997, pp. 17-18) suggest some possible questions for eliciting more information from the patron:

What do you mean by \_\_\_\_\_?  
Where did you hear/read about \_\_\_\_\_?  
Where have you checked for information so far?

These are just a few possible open-ended questions that can be used in both live and virtual reference situations. The re-state question is also a good one: "So what you're looking for is...?" There is no need to treat the reference interview as a psychoanalysis session, but these additional questions can be helpful.

## Don't Make Assumptions

I have a vague memory of a library school reference class in which we were warned to avoid making assumptions about or judging patrons under any circumstances. Our priestly duty (we were taught) is to accept all comers, never asking the forbidden question about *why* patrons need the information they request. Ross, Nilsen, and Dewdney (2002, pp. 91-93) also caution against making "premature diagnoses" about patrons or the information they seek.

In the world of virtual reference, it is easy to make the assumption that our patrons are tech-savvy. After all—they've made it to the Library Web page, and they've managed to get into the Virtual Reference Desk, haven't they? Often this may more of the luck of the mouse-click than the result of earnest searching and deep-seated desire to chat with a librarian. The virtual patron may or may not be an experienced Web surfer. They may not be totally clear on such terms as "address bar," "search engine," or even "Google" (although that is hard to believe).

## Alternatives

It seems that having multiple options available is even more important in the virtual world than in live reference. For example, our licensing agreements with database vendors restrict use to current students, faculty, and staff. What happens when someone who doesn't fall into any of these categories initiates a chat? As we explain how to search the databases, they're not going to be able to get in. Are we prepared to give limited password access to databases that allow it? Can we send them to the public library's Web site to get access to comparable resources?

## Empathy

When working with patrons in person, we can often see their frustration at not being able to find what they're looking for. Because we're such caring, sensitive people, we usually show empathy: "Yes, I know it *is* difficult to find books here sometimes," and the like. Similar statements can help create warmth in the virtual environment.

## Be Specific

Some virtual reference platforms allow co-browsing, where the librarian can more or less take over the patron's computer and show them how to navigate, step by bitter step. Unfortunately, with LiveAssistance, we have to rely on "pushing" Web sites and explaining what links to click. Though we flatter ourselves that the reference interview should be a mini-library instruction session and that we can explain away ignorance, the online environment makes such instruction difficult. We can be more effective if we send patrons the direct addresses for the information they need, then follow up with a question about whether they want the details of how to get there on their own.

## Conclusion

In *Brave New World*, Aldous Huxley (1946, p. 26) described a world of sterile, antiseptic relationships, where young people were utterly repulsed by the thought of bygone times when people actually enjoyed lasting, intimate contact. Providing reference services in the online environment may be leading us down the path toward that world. Library personnel can do much to combat that oncoming world, however, by bringing the warmth and openness of the in-person reference exchange to the virtual reference desk.

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# Rules, Bureaucracy and Customer Service: a Dialogue Between Two Public Librarians

JOY HUEBERT AND  
MARK NIXON

John N. Berry III, Editor-in-chief of Library Journal:

"One barrier to progress .....is the entrenched bureaucracy and the stifling dependence on hierarchy and longstanding policies and procedures." (Library Journal. June 15, 2003, p.8)

Public librarians Joy Huebert and Mark Nixon recently had a written dialogue about the topic of rules, bureaucracy and customer service in public libraries.

Joy:

One day an elderly library member walked through a snowstorm to get a library book. She was a widow and wanted something to read for the bad day. When she arrived at the library, she discovered she'd left her card at home.

"No," said the staff member, who knew this woman very well; "We can't sign this book out to you without your card."

"What!" I said to the staff member "you didn't let our friend sign out a book!"

"Well, it's the rules," the staff person defended herself. "We respect the rules. We can't break the rules. The rule is the rule for everybody." I saw that this was considered to be an ethical position.

Mark:

Customer service issues are a concern for all sectors of the economy. In particular the public sector suffers from stereotyped perceptions of stodgy, rule and regulation crazed bureaucrats, who jealously guard their domains and impede service.

In your example is a clue about some of the things that wrong with public library service models. In recent years our profession has made great strides to rid ourselves of the shushing, bespectacled, sensibly shod, bun wearing 'marm stereotype of old, yet we persist in institutionalizing customer service practices that are appalling.

Our professional love of order, rules, and organization, has left many libraries chained to Byzantine policies and procedures that replace the dictates of good customer service and even common sense.

The necessity of rules and procedures is understood, but they should be written to enhance customer service, not prevent it. Regulations should shield the patrons, staff and assets of a library from abuse, but they should not be so strict and cumbersome that the shield becomes a club.

Rethink your entire organizational policy. It must be patron centered and flexible. You have to replace as many rules as you can with guidelines; exceptions to your few remaining rules should not need an order in council to make. If management recognizes that a small trade off in institutional efficiency can pay dividends in terms of being able to take quick advantage of opportunities, they can trust the staff to act in the best interests of both the patrons and your library and give staff the freedom to make exceptions to suit individual situations and circumstance.

Once you have cleared away the catatonic remains of those senior staff unable to cope with the responsibility that comes with this sort of empowerment you can reexamine the entire service model of your library.

Joy: How about this story?

One day at the reference desk a woman came to me who needed a book. Her husband had cancer and this particular book had been recommended to her by her doctor. Although we had information about cancer, we didn't have this particular title. I knew that the Interlibrary Loan service was slow, and I knew how much she needed some reassurance. The book wasn't just a book – I saw that to her it also represented comfort and hope. I phoned our Library System reference librarian at the Yellowhead Regional Library. She told me that she'd located a copy in her neighbourhood branch in Edmonton and that she'd go get it that evening, sign it out to herself and let the woman have it the next day. I have to say that I was awed by her service commitment.

Mark:

What you want to do is synthesize a new service philosophy from existing service models.

Automated service models are very common in fast food environments and are characterized by the repetitive and scripted nature of the interaction. "Would you like fries with that?" is a catch phrase that must be praised for its simplicity and effectiveness. This base form of the

Mark Nixon abandoned a twenty year long career as a bookseller to become a library technologist. The core elements of the job are the same, but now he only has to charge bad people money for books. He currently tends the machines for a library in a small city in Northern Alberta and is saving his money for school so he can grow up to be a real librarian.

Joy Huebert has been a manager, consultant and children's librarian for over 20 years, currently serving as the Director in Trail, B.C. She has won the CLA/Rowecom Marketing Award, the BCLA Award of Merit and a national award from FOCAL. Joy has been the Chairperson of the Association of B.C. Public Library Directors and the West Kootenay Library Association. She is an Advanced Toastmaster who has led many seminars and workshops, and has written about public library issues for numerous publications. She can be reached at [jhuebert@traillibrary.com](mailto:jhuebert@traillibrary.com)

suggestion sale is ubiquitous because it works. Adding an extra order of fries, or upsizing the combo in even a modest five percent of transactions can have a significant impact on the bottom line.

Passive service models are common in independent retail environments (and sadly libraries) and rely on the customer or patron to initiate the service transaction. While such models respect the rights of a patron or customer to browse in peace they ignore a fundamental tenet of human psychology; people are not comfortable asking strangers for help. Many opportunities can be lost with such a model. If the objective of your library is to provide the best possible library experience, and the highest caliber of customer service to your patrons you need to examine active service models.

Active service, which appears in its most extreme form in commission sales environments takes the pitch to the customer, grabs on like a pit-pull, and doesn't let up until somebody dies or buys. As in all things there are matters of degree. It would be irresponsible to advocate the pack hunting behaviors of commission furniture salespeople, but there are lessons to be learned and tactics that can be easily adapted to your library's needs.

Joy:

Five thousand members use our library. We have many good customers. However, people steal from us. Our theft rate on magazines was recently established at 20%. People lie to us about whether they've signed out materials, and when they returned them. People yell at us when they have to pay fines, justified or not. Drunks come into the library and make our lives difficult. Customers surf the Internet for pornography, download the images onto our home page, and when the next person arrives, they are treated to "barnyardanimals.com." Customers vandalize our computers, they throw awful things into our bookdrops, they tear pages out of books, they write in books. After awhile, hardworking staff get tired and jaded and simply want to enforce rules.

Remind yourself that that patron you are greeting is not an interruption to your work, that patron IS your work, even the difficult ones. Without their participation and the participation of more like them, there would be no need to open the library, and by extension, no need for the various government agencies, funding bodies, grant providers, charitable foundations, and other sources of revenue to provide your library with operating budgets and your paycheck.

If enlightened self-interest does not motivate you, consider a more altruistic stance that could include the value and necessity of public libraries in a free and democratic society, the importance of access to information, bridging the digital divide, or any one of a thousand other lines that you can collect from past and present annual reports that you have previously used to rationalize your requests for increased funding from various government agencies, funding bodies, grant providers, charitable foundations, and other sources of revenue.

I can hear you muttering to yourself that greeting every patron as they enter the library sounds like an automated service script, and if your job description requires you to wear a paper hat at the circulation desk you would be right, but in this case you are not merely going through the motions, you are using this greeting to size up the needs of each patron. Your education, experience, and professional instincts are being used to anticipate the level of intervention and assistance that will be required of you and your staff. You are making yourself aware of who is using your library, and you are anticipating how you can enhance that user's experience.

A combination of body language, anguished cries of frustration from the stacks, and other less subtle cues can be synthesized into an understanding of the type and degree of assistance each patron requires. Or if that seems like too much work, you could always try a polite, "Can I help you?"

This line, while tried and true, is also flawed. Any experienced salesperson will tell you that closed questions, questions that can be answered with a yes or a no, are a quick way to get yourself politely dismissed by a customer, and the fast track to lost sales. In the case of libraries though, we don't have to worry about "sales" but we can still lose out on service opportunities. Questions like, "What can I help you find?" or "Where can I direct you?" are more likely to elicit a useful response and an opportunity to provide good service. Even inserting a simple "How" in front of "can I help you" will do.

You will be able to better demonstrate the value and utility of the library and your skills as an information professional if a patron responds with a tentative, "Where are the dog books?" rather than the dismissive, "Just looking around, thanks."

Joy:

Maybe we could deal with a scenario like this a bit differently:

A few years ago I had a health problem. I left the hospital depleted and sick, and a couple of days later decided to go for a walk. Because I was normally a healthy person, I walked farther than my body could manage, without realizing it. Finally I reached the public library and sank exhausted into the first comfortable chair I saw.

"You can't sit there!" the reference librarian said to me coldly. "That chair is for people who want to ask questions."

It was the rules. However, it made me feel wrong and bad to hear her speak to me like that.

You provide a prime example of rules as a barrier to service. What you wanted was a moment of rest in a friendly environment. What you got was something quite different.

The goal is to provide the right level of service. Not everybody who comes in to use the library wants to be a Library User. Some of your patrons just want what they want. It could be a book, it could be information, and sometimes it is just a moment of rest in an air-conditioned room.

They are not interested in mastering the power user features of your OPAC. They couldn't give a tinker's cuss about the Dewey Decimal System. *Library of Congress Subject Headings* will forever remain a mystery to them. These patrons will never fully understand the power of the library, or appreciate the years of education and professional training that goes into maintaining orderly stacks. But if you find what they want in a timely and courteous fashion, they leave happy and everybody wins.

Keep in mind that rejection is part of salesmanship. Salesmanship is part of customer service, and customer service is a part of librarianship. So even if your smiling and sincere offer to help is rebuffed, close the interaction in such a way that invites further contact. "Well, if you change your mind, I'm over there." or "If there is anything else, just ask", are lines that remind a patron that help is always available and that you are approachable and interested in adding value to the library experience.

Joy:

You know what? I really like your ideas. I think we have to retain our joy at bringing the right book, the right information, and the right programs to our beloved library users and then we can make better public libraries. ■

# The Genealogy Search Process

LAURIE S. FRANCIS

The search for genealogy information is not a linear, closed process like that of a student research paper, but a more circular pattern. Patrons and professional researchers often find that the more information they locate, the less certain they may be about previous 'facts'. They must verify the information they already have, make corrections and additions to their data, and continually evaluate the authenticity of all sources. Patrons frequently find they must return to an earlier stage in the search process in order to reevaluate the method or the source. This process lends itself to a new search pattern that I have labeled the Genealogy Search Process (GSP).

Although the (GSP) can be compared to the research process of a regular library patron because it loosely follows Kuhlthau's Information Search Process (ISP) model, there are some exceptions (Thomas, 1999, p. 33-38). Inexperienced genealogy patrons begin their search with feelings of uncertainty, they want to know about their family tree but initially aren't sure where to start (Kuhlthau's task initiation stage). Frequently a well-meaning friend or relative, or even a newspaper article will lead them to believe that Aunt Mary, or a family history library, or even the Internet will have all their answers. The patron begins to feel optimistic. They are sure that locating the information they need should be easy and that a wealth of details will be available to them immediately (topic selection stage).

Most patrons choose a particular ancestor or family to learn more about when they begin their search for information. Once they begin exploring the various sources (topic exploration) they can quickly become confused and frustrated, again very similar to Kuhlthau's ISP. The assistance of a knowledgeable librarian can make a big difference to the patron at this stage. The librarian can assist the patron in narrowing sources, providing descriptions of what can be found in the sources, helping the patron to determine exactly what information they should be looking for and recommending the best sources for that information (focus formulation stage).

It is at this point that most patrons either become hooked on genealogy or loose interest in the project. For those who continue, the search for information becomes a treasure hunt, with the patron taking on the role of investigator or detective. The patron begins to feel interest and ownership in the search. The librarian can assist them in locating sources, gathering information (resource collection stage) and providing instruction in how to use specific library equipment (computers, readers, indexes, etc.). By now the patron is beginning to understand some of the methods involved in searching the records to find their ancestors. They have gained some new skills and feelings of confidence and determination are common.

At this stage in the GSP genealogy patrons and experienced researchers often diverge from Kuhlthau's model. It is common for researchers to spend months and even years researching a particular family line without finding the specific information they are seeking. The genealogy patron does not necessarily experience the feelings of satisfaction and relief experienced by Kuhlthau's subjects as they completed their research and prepared a final presentation. Unfortunately, an information search does not guarantee results. The needed material may only be available at another location that doesn't lend items through interlibrary loan, or the repository may not allow the general public to search their materials and a professional researcher or member of a historical society must be contacted to search the records. Frequently, for a variety of reasons, the records that might provide the information a patron is seeking may not be available due to: natural disasters, man-made disasters, lack of appropriate preservation methods, prohibited access, translation difficulties, privacy laws and more. Over the past century records previously unavailable have been located and made available to the public, so it may also be a matter of just waiting until the records are made public.

Laurie S. Francis is a reference librarian at the David O. McKay Library at Brigham Young University-Idaho. She will receive her MLS from Emporia State University, Emporia, Kansas in May 2004. She has spent 25 years enjoying the challenge of genealogical research. She can be reached at [francis@byui.edu](mailto:francis@byui.edu).

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# The Genealogy Reference Interview

LAURIE S. FRANCIS

**S**earching for ancestors is one of the most popular hobbies in the United States. The desire to document the past in order to prepare a printed family history or just to know about one's roots has become a national pastime. Many individuals interested in locating information about their ancestors will begin their search in a library. A knowledgeable, patient librarian who understands the value of the reference interview can make the search process easier. A reference interview tailored specifically for genealogy searches can also reassure the patron that the librarian is concerned and willing to assist them with their information needs.

The genealogy interview differs from a reference interview from the very beginning. The librarian will need to ask enough direct questions early in the dialogue in order to determine if the patron is inquiring about family history materials. Not every library will have the type of resources that can provide patrons with the information they seek. Once the librarian understands the patron's needs they can determine if their collection and services can provide some or all of the materials, or if it will be necessary to direct the patron to another library. With the availability of online genealogy sites many libraries now have a variety of electronic genealogy resources that their patrons can access.

Patrons who are just beginning the search for their ancestors will have different needs than an experienced researcher. "The purpose of the [reference] interview is to elicit from the user sufficient information about the real need to enable the librarian to understand it enough to begin searching," (Ross, Nilsen, & Dewdney, 2002, p. 4). Not all genealogy patrons will know what they want when they arrive at the library. It will be up to the librarian to help them determine their needs. The reference interview will help the patron to have a "clearer and more complete picture of what [he/she] wants to know," and will "link the user to the [library's] system," (Ross, et. al.).

The interview process allows the librarian to give the patron information as well as instruction in using the library's materials. Patron instruction is often the main focus of assistance by librarians and volunteers in a genealogy setting. Instruction should be given as needed, encouraging the patron to learn the skills themselves. But don't assume a patron knows how to use the library's resources, even if they have been to the library before.

Like regular library patrons, there will be differences in culture, language and literacy levels, and these should be carefully addressed in order to serve all genealogy patrons. Language barriers can present a difficult challenge in genealogy libraries. It would be helpful to have a contact person available who speaks the most common second language in your community. Foreign language dictionaries and translation web sites can also be helpful. One of the best resources is to have copies of the most common genealogical forms in these foreign languages available in your library.

Some common sense techniques for working with language barriers include: restate what you have understood of the conversation so far, ask them to write down their question, ask for assistance from someone else, refrain from using library or genealogy jargon, don't raise your voice, speak clearly using simple words and questions, use visual aids, wait for them to answer, don't jump to conclusions about their needs, and maintain eye contact and approachable body language at all times.

"Normally, reference interviews last three minutes or less, but a reference interview with a client who has complex research needs or with a genealogist may last for twenty minutes or longer," (Ross, et. al.). While the librarian understands that it will take some time to assist the genealogy patron, the patron may be impatient to get started. Genealogy research requires specific resources and occasionally, different search methods. So it is important to assess the patron's needs thoroughly without making them feel they are being interrogated. Although the typical reference interview uses open and neutral questioning to help the patron express their needs, the genealogy interview must begin with some specific questions that require more direct answers.

*cont.*

Laurie S. Francis is a reference librarian at the David O. McKay Library at Brigham Young University-Idaho. She will receive her MLS from Emporia State University, Emporia, Kansas in May 2004. She has spent 25 years enjoying the challenge of genealogical research. She can be reached at [francisl@byui.edu](mailto:francisl@byui.edu).

## The Genealogy Reference Interview - cont.

Not all genealogy patrons are beginners. Many of them are beyond the basic stage and are looking for more than just names and dates; they are searching for historical details that will help give them a sense of their family's identity during a particular time period. Therefore it is important that the librarian understand the patron's research background before they can assist them with specific answers. According to Ross, et. al., "the problem- and the reason the reference interview is needed- is that people don't always express their information needs clearly and completely . . . the users' initial question is often not the real question." For example, a question about a particular occupation from a beginning researcher may require only clarification. The 1900 Fulton County, New York census indicates a female ancestor was a glover, and the patron requests information about glovers. A librarian might be tempted to give the simple answer, that a glover was someone who made leather gloves. However, when an experienced researcher asks the same question, the answer requires much more investigation. They may be looking for information about the glove industry in upstate New York, the ban on women making gloves at home, women's roles in industrial reform, wages, glove patterns, the effects on the economy from the glove cutter's strikes in 1897 and 1914, or first hand accounts and oral transcripts of life as a glover.

Most genealogy patrons come to a library because they want specific help or to access specific resources, and they will appreciate the sincere efforts of librarians and volunteers. The following basic reference questions are important in beginning a dialogue with the patron: What information are they searching for? Where have they already looked? What information do they already have? Where did they get the information they are using? What format do they want the information in? The librarian must know what format the information is already available in: book, microfilm, fiche, online, manuscript, etc. How much time does the patron have or want to spend right now? Is there a deadline for locating the information? How much experience with the computer (microfilm readers, indexes, etc.) does the patron have? Does the patron really need the exact book or film they are requesting? Would another source be better? Is this patron gathering the information for himself or herself or someone else?

As a final note, it is important for librarians to know when and where to refer patrons when library resources are not sufficient. A careful reference interview can help the librarian know when patron's needs are better satisfied elsewhere.

### SIDEBAR:

A variety of patron needs can be determined through thoughtful, detailed questions. The following flowchart of questions may be helpful to librarians and volunteers when working with genealogy patrons.

## Genealogy Reference Interview

1. Are you just beginning your family history search?
  - A. Yes (go to question 3)
  - A. No (go to question 2)
2. How can I help you?
  - A. Patron is searching for specific data: names, dates, locations (go to question 4)
  - A. Patron wants to use computer (go to question 6)
  - A. Patron just needs blank forms or research guides (provide forms as needed, give them the URL's for online versions)
  - A. Experienced patron with detailed questions (go to question 3)
  - A. Patron is looking for a specific source, census, birth records, International Genealogical Index (IGI), etc. (determine what information they expect to find in the source, if that is in fact the best source to use, and assist in locating and using the appropriate source to extract information)
3. What kind of information are you looking for?
  - A. Help in getting started with my family tree (go to question 5)
  - A. Information about a specific ancestor (go to question 4)
  - A. Specific information about several ancestors (go to question 4)
  - A. Help locating or ordering a specific source or reference item (give patron help as needed based on their request)
  - A. Help locating family medical history (go to question 11)<sup>1</sup>
  - A. Historical information about the community (What information do you already have? What are you looking for? Refer them to appropriate local or state history collections, historical societies, special libraries, etc.)
4. What information do you already know? Do you have it with you? Have you recorded your information on a family group sheet or pedigree chart?
  - A. Patron has names, dates, and locations with them in writing (go to questions 5 and 7)
  - A. Patron has names, dates, and locations in their head (go to questions 7, 8 and 9)
  - A. Patron knows information but didn't bring it (go to questions 8 and 9)
  - A. Patron doesn't have names, dates or locations (go to questions 9 and 12 to prepare for future visits)

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<sup>1</sup>Explain how to prepare a medical pedigree chart (show them an example if your library has one), recommend that patrons search for obituaries, death certificates, census mortality schedules and military records which contain cause of death information and some medical information, family medical questionnaires can be valuable, check medical dictionaries for explanations of terminology (Cyndislist.com includes historical medical terms), doctors, hospitals and insurance companies will rarely divulge information due to privacy issues.

## The Genealogy Reference Interview - cont.

5. How are you planning to use this information?
  - A. Compile a family history (assist patron in determining what further information they need and the resources available to obtain it, go to questions 7 and 10 if appropriate)
  - A. For a school project (assist patron in determining what further information they need and the resources available to obtain it)
  - A. Prepare to submit information to various online programs: Ancestral File, IGI, Genealogy.com, Ancestry.com, etc. (go to question 10)
6. How do you feel about using a computer?
  - A. No experience (go to question 9)
  - A. Some experience (go to question 9 or offer to assist as appropriate)
  - A. Experienced (offer to assist as appropriate)
7. Are you familiar with the family tree programs, Family Tree Maker, Personal Ancestral File (PAF), Legacy, Generations, Family Origins, Ancestral Quest, etc.? Would you like to record the information you know on a disk using one of these programs?
  - A. Yes. Provide disk (for free or for sale depending on library's policy) for patron to record data, assist as needed with using the computer programs.
  - A. No. Patron doesn't remember enough to record data. Give them printed forms to take home, offer to explain how the computer programs work and to assist them with data entry when they come back.
8. Would you like to record the information you know on a family group sheet or pedigree chart?
  - A. Yes. Provide printed forms for patron to record data, assist as needed to fill them out (go to question 12)
  - A. No. Patron doesn't remember enough to record data, give them forms to take home and explain how to fill them out (go to question 12 and others as appropriate)
9. Can I help you use the Computer, reader, copier, family tree program, Internet, CD's, microfilm, fiche, Soundex, index, library catalogs, etc.? (instructional opportunity)
10. What documentation do you have for these names, dates, and locations?
  - A. None or some (provide assistance in locating vital record certificates, church records, military records, land records, census records, etc., or addresses of where to write)
  - A. Already have accurate documentation (go to question 7, further assistance as needed)
11. Have you contacted family members for additional information? They can be a great resource for names, but remember that dates from memory aren't always accurate. Family records are also one of the best ways of obtaining family medical information.
  - A. No. Offer sample letters.
  - A. Yes. Have you recorded and verified the data? Give further assistance as needed.
12. What else can I assist you with today?

Other helpful questions that may not flow directly from the previous questions:

How long can you stay this morning/afternoon/evening?

Are you interested in a research guide? (by country, state, topic, census, court records, etc.)

May I help you order materials through interlibrary loan?

Would you be interested in one of our classes or workshops?

Would you like a tour of our library?

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# Compassionate Pioneering as a Work Expectation

SANDY CAMPBELL, MICHAEL  
BRUNDIN, GEOFFREY HARDER,  
AND JULIET NIELSEN

Compassionate pioneering is a new concept in libraries, introduced by Steven W. Gilbert of the TLT Group. Gilbert has defined the term “compassionate pioneer” in the following way:

*Compassionate Pioneers are those who not only reach beyond their own limits and lead the way in developing or trying new options, but who also encourage and help their colleagues to take the same path<sup>1</sup>.*

A further understanding of the term may be gleaned by reviewing the criteria for the Tom Creed Memorial Compassionate Pioneer Award, instituted by the TLT Group in 2000.

*The criteria for selecting the winners of this award reflect some of the most admired characteristics of Creed’s work. Compassionate Pioneer faculty members are those who:*

- 1. Use technology in new ways to improve teaching and learning.*
- 2. Use technology to make learning more effective and engaging for students outside of the classroom; especially in ways that complement and support more interactive uses of face-to-face classroom time.*
- 3. Encourage and help colleagues (both within their own departments and institutions -- and beyond) to develop their own educational uses of information technology.*
- 4. Enjoy teaching, enjoy helping others; and, when appropriate, make learning more enjoyable for students.<sup>2</sup>*

Librarianship is a “helping” profession, and in academic librarianship, there is a very strong educational ethic. Learning new databases, systems, software and hardware, so that they can be taught to users has been the core of public service librarians’ jobs for the past 15 years. However, there are a number of barriers that may prevent a librarian from effectively transferring newly-acquired knowledge, particularly technology based knowledge, to co-workers and colleagues.

Among the barriers may be lack of time, lack of a structure to allow the transfer of information (no one has time to listen/no organizational learning strategy), a cumbersome structure for information transfer (the dreaded team training session), unwillingness to transfer information (hoarding of information), shyness and fear of rebuff (If I wanted your help, I’d ask for it), failure to recognize that there is a need to transfer information (no one asked for help) and cultural barriers such as differences in age, gender or position in the organization.

In 2002, three recently graduated librarians, Michael Brundin, Geoffrey Harder, and Juliet Nielsen were appointed to public service positions at the University of Alberta Science and Technology Library. To some extent, their selection for the positions was based on their technology-related competencies.

During the early weeks of their employment, work expectations were negotiated with all three librarians. Brundin, Harder and Nielsen were each given primary responsibility for liaison with one or more teaching departments, including collections work, instruction, faculty contact and extended reference. Each was also assigned dedicated reference desk hours, chat reference, and was responsible for various other duties. In addition, each was given the expectation: “*Act as a compassionate pioneer in matters of technical ability*”. During orientations, the concept of compassionate pioneering was reviewed.

By including compassionate pioneering in each new librarian’s work expectations, we sought not only to encourage proactive communication of technical knowledge, but also the further development of the peer education processes already present in the Science and Technology Library. The ways in which Brundin, Harder and Nielsen were to practice compassionate pioneering were left to their discretion.

Sandy Campbell is Acting Collections Manager for The Science and Technology Library at The University of Alberta. She can be reached at [sandy.campbell@ualberta.ca](mailto:sandy.campbell@ualberta.ca)

Michael Brundin is a Public Services Librarian at The Science and Technology Library, University of Alberta. He can be reached at [michael.brundin@ualberta.ca](mailto:michael.brundin@ualberta.ca)

Geoffrey Harder is a Public Services Librarian at The Science and Technology Library, University of Alberta. She can be reached at [geoffrey.harder@ualberta.ca](mailto:geoffrey.harder@ualberta.ca)

Juliet Nielsen is a Public Services Librarian at SIAST - Wascana Campus Library Regina, SK. She can be reached at [nielsenju@siastr.sk.ca](mailto:nielsenju@siastr.sk.ca)

During the year of working with the expectation, the librarians used the following techniques to practice compassionate:

1. Formal instruction  
Having learning a new technology based skill, for example the use of the Procite software, classroom sessions and one-on-one instruction provided a formal structure for passing on the knowledge.
2. Seizing the teachable moment during casual trouble shooting.  
Responding to such questions as "Why can't I get my email to filter?" "I can't get this student's Web-CT file to print - can you help him?" or "How does this database work?" creates a teachable moment . The three librarians all took up many opportunities to invite colleagues to observe while they worked their way through solutions to technical problems.
3. Being the "resident expert" or "go-to" person for a technology.  
Simply knowing who to ask is sometimes a barrier to acquiring technological information. In this case, the librarians let it be known through a variety of vehicles including discussion and presentations that they were expert in Procite, PDA's and the local bindery file, which created a standing invitation to consult with them.
4. Peer collaboration  
By working along side a colleague whose skill sets are different, on the development of a project, the librarians were able to teach others and continue to learn. For example, building a web-log with a colleague or practicing with the virtual reference software allowed the librarians to transfer knowledge in a developmental environment.
5. Spreading the news  
By following both the media and the trade press, the librarians were able to identify important technology developments and highlight those to others through casual conversation, emails and forwarded links.
6. Being available and approachable.  
By keeping an open door policy, responding to requests for help including when they had little knowledge of the particular problem, and being positive about their own abilities and those of the rest of the staff, the librarians encouraged the flow of information about technical matters.

Reviewing their experience Brundin, Harder and Nielsen made the following observations:

1. The presence of the compassionate pioneering expectation provided a validation of the responsibility to diffuse new knowledge throughout the workplace and highlighted the value placed on that activity in their workplace.
2. While each librarian had practiced compassionate pioneering during the year, they felt that their actions were more motivated by personality, desire to teach and the general atmosphere of constant education, than by the imperative of the expectation.
3. The presence of the expectation did supply some level of psychological permission to proactively teach among staff.
4. Other staff, apart from supervisors, were not made aware of the compassionate pioneering expectation, so it did not have an impact on the staff response to instruction. None of the librarians received a negative response from anyone whom they taught.
5. All concluded that compassionate pioneering really extended beyond technology issues and could be practiced in any facet of the library's operation.
6. All were aware of the fact that by undertaking this expectation and fulfilling it, they have undertaken a form of pioneering, and by sharing their conclusions are, in fact, practicing compassionate pioneering, in the broadest sense.

## Conclusion

Recognizing compassionate pioneering as a formal work expectation can foster an institutional culture of skill sharing and development. Skill sharing should be a valued and recognized component of each person's job, and not something to be taken for granted. Exponential growth in the cumulative knowledge of the organization can occur when one person's "development" experience, or acquired skill is shared with someone who will in turn share this new found knowledge with someone else.

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## Meet Molly Gloss - cont.

Gloss spent nearly five years at home learning to write. Her first attempt at publication was a manuscript she wrote for a Western novel contest. Her novel did not win the contest, but the process taught her much about the craft: "I think you learn to write by writing and I pretty much taught myself to write by focusing on it every day for six months" (*BookSense.com* [2], screen 4). During this period she also experienced a "life-altering" event – a writing class at Portland State University taught by Ursula Le Guin (Frederick 37). Le Guin encouraged Gloss to continue writing (Frederick 37) and her verbal support gave Gloss the impetus to try her hand at writing professionally. Her first published short story, "The Doe," appeared in *Calyx* in 1981, followed by a "fairly steady" stream of other stories, mostly science fiction" (Frederick 37). "[T]here was really no turning back" after selling her first short story, and she stayed home to work full time at her newly learned craft

(*BookSense.com* [2], screen 4). The author credits her husband, a blue collar worker, with giving her the "most fundamental" kind of support, when he told her to "Keep on writing. You don't have to go back to work, we'll get by" (*BookSense.com* [2], screen 4). While Gloss reveals little more about her husband and son in interviews, she does admit to kindly views of men due to her long-term marriage. She further acknowledges that the men in her novels "have been

in large part modeled on the men I know, who happen to be mostly gentle men" (*ReadingGroupGuides.com*, screen 2).

Molly Gloss's first full-length book, *Outside the Gates*, was published in 1986. The author refers to it as an "accidental" book because the young adult fantasy novel began as a short story to be given to her son as a Christmas present. She had planned to write a fifteen or twenty page adventure that she also considered illustrating, but it grew into something much bigger (Morris, *Talking* 126; Frederick 37). Unlike the author's later books that have female central figures, the protagonist of *Outside the Gates* is "a boy, cast out from his community, [who] struggles for survival in the wilderness" (Frederick 37) as he attempts to establish a community for himself. Reviewers praised the novel as "[S]uperior fantasy," "Thought-provoking and satisfying," and "Spare in style and subtle in description [...] an elegant, touching fantasy [...]" (Gloss, *Molly Gloss: Books and Reviews*, screen 1). Gloss's son was ten years old when she began the short story, but by the time she had completed the novel that it had grown into, he was a teenager. The author, however, felt this "was fortunate in one way, because it never was a book for a ten-year-old [...]. It speaks to the isolation of adolescence" (Morris, *Talking* 126). In addition to providing Gloss with success on her first publishing attempt, *Outside the Gates* also taught the author

*Gloss spent nearly five years at home learning to write. Her first attempt at publication was a manuscript she wrote for a Western novel contest. Her novel did not win the contest, but the process taught her much about the craft.*

a valuable lesson in writing. Reflecting on the novel's origins and development, Gloss realized that she had "an easier time than I might have, keeping kite strings from tangling" because of how it grew from a short story, with fewer characters, into a full-blown novel (Morris, *Talking* 126).

Gloss continued to publish science fiction short stories after *Outside the Gates*, in part because the genre allowed her to pursue her favorite Western themes:

You can put people on unpopulated landscapes and give them pioneer-like situations – it just maybe wouldn't be on this planet. That worked like a charm. I wrote a number of science fiction short stories, all of which got published pretty rapidly. All of them had rural farm or ranch kinds of settings and questions [...]. (*Powells.com*, screens 5-6)

But the author prefers to characterize herself as a Western writer and "the dearth of western novels with women protagonists continued to nag" at her (Frederick 37). Encouraged by the success of her first book, Gloss turned her attention to writing a book that would address that gap.

As a native of Oregon, Gloss had ample opportunities to "discover" the West. She credits her father with showing her "what the Real West looked like" (Beckham 301) on annual family trips to visit relatives in Texas, trips she affectionately refers to as "my covered wagon experience" (Frederick 36; Beckham 302). Camping and cooking out were a necessity on these cross-country journeys for this "pretty poor" family (36), but the author's memories of the trips bubble over with the enthusiasm of a youngster on an adventure:

We were camping 5 of us and two big dogs in a 9 by 9 umbrella tent, sleeping cold in folded up blankets and thin sleeping bags on cheap plastic air mattresses that went flat every night; we crammed everything we needed for weeks into the trunk of a car that couldn't be relied upon, and hung our laundry out the windows as we drove. We put up the tent wherever we could, just the best place we could find when the light started to fail... We camped in the snow on a mountain in Utah, where the only water was most of a mile downhill [...]. In Yellowstone Park, the grizzlies beat in the trunk of our car trying to get at the food [...]. I pulled the edge of my sleeping bag over my head and shook, and the sound I heard then is the sound Lydia Sanderson [*The Jump-Off Creek*] hears when she stands shaking in the darkness on the hillside behind her house, holding the shotgun but afraid to shoot it. (Beckham 301)

Wilderness experiences, Western landscape, campfires and Western novels blended to give Gloss the foundation that would later enable her to write *The Jump-Off Creek*. Lydia Sanderson knows what it feels like to be alone in the dark with a wild animal threatening nearby because Gloss experienced it in Yellowstone Park; Lydia knows how to set up camp in the dark and she knows how to slog through snow and slush to haul water because the author had camped in fading light and snow and had walked a mile to get water. The authenticity of the settings and plot of *The Jump-Off Creek* find their roots in Molly Gloss's cross-country trips. But if the cross-country trips and the old pulp Westerns provided the stage for *The Jump-Off Creek*, then perhaps the westering women of Molly's family inspired the characters:

## Meet Molly Gloss - cont.

The story that was most often told in our family was that my great-grandmother Lena had come across the West in a covered wagon when she was a girl. [...] I also knew another great-grandmother had been widowed when her husband fell from a horse. And one of my great-grandmothers had named her last-born son "Z." [...] Emma moved to Walla Walla, Washington [...]. She supported her six children by taking in other people's laundry. [...] Molly was the great-grandmother I was named for [...]. She had twelve children. The last born were twins, and she named them Y and Z. [...] I've realized probably my great-grandmothers are just fairly representative of the kinds of women who settled the West. (Morris, *Talking* 127-129)

When she began reading women's diaries and old Western novels, Gloss told herself that she was not writing a Western but that she was "just collecting and reading a lot of old books by women" (Beckham 304). Nevertheless, her frustration at not finding any of the books she wanted to read – Westerns in the style of Willa Cather – prompted Gloss to dig out an "old, awful manuscript" from a drawer where it had been lying for six years, a manuscript she had worked on when she was first teaching herself to write. The manuscript was as awful as Gloss had remembered it, but "there were two or three good scenes in it [...] and before I knew what I was doing I had cannibalized the thing and begun a new book" (Beckham 305).

Gloss worked for two years on *The Jump-Off Creek*, perfecting the characters and story line. As she was writing Gloss admitted to some misgivings regarding the project. She recognized that

The last of the Western short-fiction magazines had been defunct for 15 or 20 years, and Louis L'Amour owned the book market. If you took the movies and television as a standard, the Western was dead. (Beckham 304)

Her own experience with writing short Western fiction was that the market had dried up; she had written a short story some years earlier and found there was no place to send it. Gloss's assessment of the Western writing market was confirmed by an exhaustive examination of popular Western fiction from 1860 to 1960 in which Christine Bold found that Louis L'Amour threatened "to plot out every possible combination of time, place, and character in the American West" (Bold 155-6). The Western movie was also "moribund" (Morris, *Talking* 127). Gloss had come to the logical conclusion that "the Western was dead" or if not completely dead, then certainly in a deep sleep. And Gloss's "Western" had another potential problem: it featured a woman homesteader as the chief protagonist in a genre that usually starred

[...] a lone man packing a gun, astride a horse, hat pulled close to the eyes, emerging as if by magic out of a landscape from which he seems ineluctably a part.[...] More than anything else, this persistent obsession with masculinity marks the Western [...]. (Mitchell 3)

Undaunted by these potentially discouraging facts and perhaps buoyed by the certainty that she writes chiefly for her own pleasure (*Powells.com*, screen 1; Morris, *Talking* 130), Gloss proceeded with her project. Her determina-

tion was rewarded when Houghton-Mifflin snapped up the manuscript in a mere nine days after Atheneum had lost the manuscript twice in the course of a year (Frederick 37) and published *The Jump-Off Creek* in 1989. The author was particularly pleased by the publisher's interest since Houghton also publishes the works of Willa Cather and A.B. Guthrie, Jr., in addition to carrying "a strong backlist about women in the West, both in fiction and nonfiction" (Frederick 37). *The Jump-Off Creek* remains in print nearly 15 years after publication, a significant testament to its merit. The novel immediately struck a chord with critics, historians, educators and the general public for its spare poetic language and its portrayal of Western themes and images. Reviewers praised the book for its honesty, simplicity and insightfulness. The main character, Lydia Sanderson, won approval for her genuineness; no longer one of the stereotypical women generally found in Westerns, she is a real westering woman, one who chops wood, builds fences, herds cattle and castrates calves. The *Boston Globe* found *The Jump-Off Creek* "Far more inspiring than all the inflated heroism of the big-sky epics most of us grew up on" (Gloss, *Molly Gloss: Books and Reviews*, screen 1) and the *Los Angeles Times* called it "A classic of its kind" containing "enough valor to make an ordinary life seem heroic" (21). Ursula Le Guin calls it a "powerful novel [...] a classic of western writing" ("Gifts"). The book went on to win the Pacific Northwest Booksellers Award and the Oregon Book Award, and it was a finalist for the PEN/Faulkner Award (*ReadingGroupGuides.com*, screen 1), although all of the attention caught the author somewhat by surprise:

And when Susan Shreve called to tell me it [*The Jump-Off Creek*] had been nominated for the PEN/Faulkner, in the minute or so before she'd got to the point – while she was telling me what PEN was, and what the award was about – I was wondering, why is this woman calling me? And guessing, first, that she wanted a donation for PEN. (Morris, *Talking* 131)

Gloss, it seemed, was well on her way to establishing herself as a Western writer in the best literary sense. But despite the wide acclaim for *The Jump-Off Creek*, it had taken her agent a year to find a publisher willing to buy it. Gloss at the time "was convinced that writing it 'was a mistake career-wise' [...] and she immediately went back to work on a 'safe' project, a science fiction novel" (Frederick 37).

Gloss spent six "slogging years" (Frederick 37) writing the science fiction novel *The Dazzle of Day*. The book tells the story of a "multigeneration [Quaker] starship reaching its destination in a distant solar system" (Gloss, *Molly Gloss: Books and Reviews*, screen 1) where the inhabitants must decide whether or not to land the deteriorating ship on a potentially hostile planet. Writing *The Dazzle of Day* enabled Gloss to return to a comfortable genre where she had successfully published in the past, but the sudden and drastic switching of genres also resulted in a hard sell to publishers. Houghton Mifflin, who had so eagerly published Gloss's previous novel, passed on the opportunity to publish *The Dazzle of Day*. Other literary houses refused it as well, explaining "this is beautiful, it's lyrical and poetic, but there's a spaceship in it" (Frederick 37). Science fiction publishers read the manuscript and commented "this is beautiful, it's lyrical and poetic, but there are no robots or laser guns" (Frederick 37). Tor finally published Gloss's third novel in 1996 and like *The Jump-Off Creek* it became a critical success. *The New York Times* named *The Dazzle of Day* a Notable Book; it also earned Gloss a second

## Meet Molly Gloss - cont.

Oregon Book Award, a Whiting Writer's Award and the PEN Center USA West Award for Fiction (Frederick 37; Gloss, *Molly Gloss : Awards and Honors*, screen 1). Despite the strong reviews of *The Dazzle of Day*, it "pretty much sank like a stone" because "people who liked *Jump-Off Creek* weren't willing to follow [Gloss] into science fiction" (*Powells.com*, screen 6). The author subsequently returned her attention to the subject of the westering woman.

While researching *The Jump-Off Creek* Gloss had found a wealth of information about women novelists at the turn of the century. She learned that writing was considered "an acceptable occupation" for women in the late 1800s and early 1900s (*ReadingGroupGuides.com*, screen 2). Intrigued by these early authors' successes and acceptance Gloss began working on a novel about a woman writer in the early years of the twentieth century. *Wild Life*, published in 2000, introduces the fictional Charlotte Drummond, who earns a living for herself and her five sons by writing romances. Gloss modeled her female protagonist on the writer Mary Hallock Foote. Charlotte's "writing" was modeled on Mary Austin's work and Gloss derived Charlotte's feminism and views on male-female relationships from those of Charlotte Perkins Gilman (*ReadingGroupGuides.com*, screen 2). Once again, Gloss had found a fictional formula that appealed to both critics and the public.

In interviews Gloss frequently relates a story about a Boy Scout outing her son had been on when he was young. To earn a badge the scout needed to spend a night in the woods, next to a tree, with no sleeping bag, no flashlight and no company. Gloss decided to imitate her son's somewhat frightening wilderness experience, taking only her dog to keep her company, and she discovered it was "a very different experience" from any previous wilderness outings (*BookSense.com*, screen 3). The author and her dog felt "quite *other than* what was around us" (*Powells.com*, screen 3). "It was scary" for Gloss and the experience sent her in a different direction with *Wild Life*, directing it toward a wilderness adventure for Charlotte rather than the scientific expedition that the author originally had planned (*BookSense.com*, screen 4). Gloss's Western experiences once again figure heavily in her writing as Charlotte Drummond clearly knows the fear of spending night after night alone in a dark forest, noisy with the sounds of the wild. And although Gloss "can't imagine *Wild Life* being moved somewhere else and being the same story" (*BookSense.com* [2], screen 2), the novel is much more than a regional tale. While landscape figures heavily in the plot, with the densely forested hills and mountains "taking roles almost equal to the characters" (Morris, *Talking* 134), like Gloss's other works *Wild Life* is "about people, about any number of universal issues" (*Powells.com*, screen 2), including connecting and communicating (Morris, *Talking* 134).

Gloss has the good fortune to be able to state on her Web site: "I've never had a bad review" (Gloss, *Molly Gloss : Books and Reviews*, screen 1). Certainly *Wild Life* lives up to that statement with a starred review in *Publisher's Weekly*: "Gloss generates heat and humor [...]. [T]he writing is gorgeous, the characters real and vivid, and the story transforming" (8 May

2000, 204). Another reviewer pronounced *Wild Life* "Adventurous in character, story and thought; cannily constructed; epigrammatic; and beautifully written" (Gloss, *Molly Gloss : Books and Reviews*, screen 1). Still others commented, "It is a powerful meditation on the broken connection between wild nature and the wildness within us" (Gould); Gloss has "skillfully set so many pieces of narrative machinery in motion" (Reed); and "Molly Gloss has accomplished something no less than extraordinary [...]. Gloss has woven a tale as heart-rending as it is fantastic" (Friedman). *Wild Life* went on to receive the James Tiptree, Jr. Memorial Award and it was named the 2002 selection of Seattle Public Library/Washington Center for the Book's "If All of Seattle Read the Same Book" event (Gloss, *Molly Gloss : Awards and Honors*, screen 1). But behind the glowing reviews the novel had a somewhat rocky publishing history. *Wild Life* was part of a two-book contract with Tor, but because it "was neither a science fiction novel nor a traditional western to be slotted under St. Martin's companion Forge imprint," it remained unpublished (Frederick 37). Gloss eventually bought the book back from Tor and "it took some time to sell the book" again, though neither the author nor her agent understood why it had become such a tough sell (Frederick 37). To Gloss's immense relief, Simon & Schuster finally bought and published *Wild Life*, and while the author is "delighted with her new home" at the legendary publisher, it remains to be seen if Simon and Schuster will follow her into her next writing venture.

Gloss's relatively small oeuvre has generated nearly unanimous support and approval from critics and the public, proving that she is, indeed, a Western writer to be reckoned with. She occasionally teaches writing and literature of the American West at Portland State University, the same institution where Ursula Le Guin once taught the aspiring author. Gloss has lived her entire life in the Portland area and although she professes a love for the drier landscapes of the West, she continues to reside in the city with her cat and dog, in a "cottage style house" in a "neighborhood of tree-lined streets and tidy bungalows" (Frederick 36), explaining that "it's a great town for supporting writers for a number of reasons, not least of which is the rain. I do almost all my writing in those nine months when it rains" (*Powells.com*, screen 8). Her house

with its leaded windows, glass doorknobs and hardwood floors [...] seems entirely suited to a writer who returns again and again in her fiction to the landscape of the West, frontier life and the wilderness. Fringed lampshades hark back to a bygone era, a fishing creel hangs from the dining room wall and a mantel clock above the fireplace ticks steadily. (Frederick 36)

Meanwhile, when she leaves her house, Gloss's "favorite places" are nearby: "I love the Long Beach peninsula in Washington State [...]. [T]hat Skamokawa area that's in *Wild Life* [...]. I love Eastern Oregon, which is very dry, and the high desert feel of it" (*BookSense.com*, screen 2).

The author's plans for her next book vary according to

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## Meet Molly Gloss - cont.

source, although Gloss has said that the book may include an actual romance involving an early 1900s woman ornithologist at the Washington State Long Beach Peninsula (*BookSense.com*, screen 2; Frederick 37). The author's Web site, however, finds her taking a very different route: she recently "spent a week on a working 30,000 acre cattle ranch in Southern Idaho researching for a new novel" (Gloss, *Molly Gloss : Photo Album*, screen 1). Widowed a few years ago, Gloss decided to suspend her current writing project at that time: "With all the changes that have taken place in my life, I'll just have to look at it and see, when I get back to it, whether it still interests me" (Frederick 37). Whatever direction her new novel takes, the author confides that her taste in novels tends toward the "mythical/ metaphorical/utopian/western/adventure novel that transcends its genre" (*ReadingGroupGuides.com*, screen 2) and that she tries to "write a book that I can't find on the shelf to read" (*Powells.com*, screen 7). Perhaps Charlotte Drummond in *Wild Life* speaks best for the author when she writes in her diary:

To write, I have decided, is to be insane. In ordinary life you look sane, act sane [...]. But once you start to write, you are moonstruck, out of your senses. As you stare hard inward, following behind your eyes the images of invisible places, of people, of events, and listening hard inward to silent voices and unspoken conversations – as you are seeing the story, hearing it, feeling it – your very skin becomes permeable, not a boundary, and you enter the place of your writing and live inside the people who live there. You think and say incredible things. You even love other people [...]. And here is the interesting thing to me: when this happens, you often learn something, understand something, that can transcend the words on the paper. (19)

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## What Libraries Do Best: Bringing Warmth to Virtual Reference - cont.

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### The Genealogy Search Process - cont.

Once the patron reaches the point that they can no longer obtain accurate, pertinent information they must return to an earlier point in the research process, review their information and determine a new direction for the GSP. When the patron decides they have reached the end of their search they move into the final phase, similar to the presentation stage of Kuhlthau's model. Feelings of relief, pride in accomplishment and genuine satisfaction in having learned more than just names and dates about their family are typical for the genealogy patron. Many patrons choose to display the results of their searches as printed or framed family trees, others publish books detailing their research, or post it on the web for others to appreciate.

Some patrons experience overwhelming feelings of possessiveness and selfishness about their final product, refusing

to share their information, feeling that they have done the hard work and so should others interested in the same data. Those who publish their research in books, magazine articles and online formats have a right to expect protection of their intellectual property rights and appropriate citations for their efforts and information. But one's great great grandparents belong to all of their descendants, not just the researcher who located their information. However, those who would take another's research and try to pass it off as their own are practicing unethical and illegal behavior.

I would like to suggest that Kuhlthau's ISP model could be modified in the following manner, making it a better fit for genealogy patrons.

### Genealogy Search Process Model

Stages	Feelings	Actions
Desire to search for ancestors ( <i>task initiation</i> )	interested but uncertain	decision is made to begin searching
Search for a specific family or individual begins ( <i>topic selection</i> )	optimistic	ask questions, go to a library, enroll in a class
Research process ( <i>topic exploration</i> )	confused, frustrated	search records often in a shotgun approach, contact others for assistance (librarians, professional researchers, others)
Concentrate on specific records or geographical areas ( <i>focus formulation</i> )	increased interest, curiosity, fascination, determination, OR abandonment occurs	search specific types of records, or particular localities
Gain skills	confident	learn research methods and skills
Gather data ( <i>resource collection</i> )	encouraged, a sense of progress, OR anger*	note taking, letter writing, traveling, active research
Change direction of research, new records or locations	determination, perseverance, OR, irritation, frustration, anger, impatience	review and verify known information, widen research area, select another family
Closure ( <i>presentation</i> )	satisfaction, pride, accomplishment, OR <i>sad but realize there isn't anything more to do</i>	print/frame family tree, publish book, article, or online version, help others with their research

\*It isn't uncommon for some patrons to become angry and behave irrationally during and after their searches. Impatience and frustration with lengthy searches, copy costs, borrowing charges, postage and travel expenses, the cost of professional researchers, dead ends, inaccurate information, laws, and more, can induce temper tantrums in the most docile patrons.

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# Leadership Institute Available in The Pacific Northwest

The Pacific Northwest Library Association has created a regional Leadership Institute. The first Institute will be held the week of October 24, 2004 at Dumas Bay a retreat facility on Puget Sound in Federal Way, Washington, south of Seattle. The Institute is designed to provide opportunities for emerging library leaders in the Pacific Northwest to cultivate their leadership skills and potential. Library leaders may be support staff or library school graduates. This institute is geared for library professionals at all levels. Schreiber Shannon Associates, who have led Leadership Institutes in Utah, Maryland, Ohio, New Mexico, New Zealand, Australia, and Montana, will be the Institute facilitators. The goals of the institute are to provide a combination of skills development, knowledge, and networking opportunities that will build participants' confidence in their abilities and provide a foundation for further growth as information professionals and leaders. As many as thirty-six attendees may be chosen to work with the two presenters Becky Schreiber and John M. Shannon and eight group mentors. The mentors will be library leaders from

Alaska, Alberta, British Columbia, Idaho, Montana, Oregon, and Washington. Application forms for potential attendees will be found at the PNLA Web site. Applicants will need to be residents of: Alaska, Alberta, British Columbia, Idaho, Montana, Oregon, and Washington. To qualify the applicants need to be a member of the Pacific Northwest Library Association or one of the above state or provincial associations. The application form and packet gives details of past work requirements and responsibility for registration fees. Applications are due April 30 and successful candidates will be announced by June. For more information contact: [www.pnla.org](http://www.pnla.org) or

Susannah Price  
Boise Public Library  
Boise, Idaho, 83702

Email: [sprice@cityofboise.org](mailto:sprice@cityofboise.org); phone (208) 384-4026; fax (208) 384-4156.

## PNLA LEADERSHIP INSTITUTE Cultivating Library Leaders of the Future

### The Institute

The Pacific Northwest Library Association (PNLA) Leadership Institute is designed to provide opportunities for emerging library leaders in the Pacific Northwest to cultivate their leadership skills and potential.

Library leaders may be support staff or library school graduates. This institute is geared for library professionals at all levels from the Pacific Northwest. If you are an emerging leader with a desire to network with other leaders and increase your skills, this is an institute for you.

### Dates

Sunday evening, October 24, 2004 to noon on Friday October 30, 2004

### Place

Dumas Bay, Federal Way, Washington (a retreat facility on Puget Sound, south of Seattle)

### Institute Leaders

Becky Schreiber and John M. Shannon

### Mentors

Eight leaders from the Pacific Northwest Library community will be invited to act as mentors. The role of the Mentors is to act as team facilitators, guides, coaches, sounding boards, and role models. They will engage in group discussions and work with the . . .

### Participants

The PNLA Leadership Institute is targeting both support and professional library employees from the Pacific Northwest that demonstrate leadership qualities. The session is directed at 36 participants with five to 15 years of library experience.

Participants considered are those who have exhibited leadership potential and a successful work experience.

### Criteria

- At least one letter of support from employers, associations, or library schools
- Applicants must have a current membership with the Pacific Northwest Library Association and/or  
Washington Library Association  
Idaho Library Association  
Oregon Library Association  
Montana Library Association  
Alaska Library Association  
Alberta Library Association  
British Columbia Library Association
- Candidates must have worked in a library for 5-15 years
- Candidates must submit a 1-page resume along with a 1-page synopsis of achievement, career goals and expectations of the PNLA Leadership Institute experience.
- Records should show:
  - a) Demonstration of leadership potential
  - b) Successful employment experience
  - c) Excellent communication skills

This institute is for any library employee with leadership potential. There is no requirement for an MLS.

The successful candidate must secure funding to cover a registration fee (\$1000) and transportation costs to Seattle, WA. Attendees are encouraged to seek sponsorship, apply for Continuing Education Grants from their Library Associations (where applicable) or pay all or part of the fees themselves or have their employer cover the costs.

**Note:** PNLA is striving to obtain donations to help keep costs down. If we are successful, we will inform applicants later.

cont.

Attendees will be expected to complete any pre-institute readings and/ or homework and come prepared to participate fully in the institute.

**Application Package Must Contain**

- 1) At least one letter of support from an employer/ supervisor, library associate, or library school.
- 2) One page resume and a one page synopsis of achievements, career goals, and expectations of the PNLA Leadership Institute experience.
- 3) Two letters of recommendation.
- 4) A short summary of library employment or experiences (no more than one page.)
- 5) A one page statement that includes why the candidate wants to attend this institute, what the candidate expects to gain from attending, and how attending this institute is expected to impact participation in his/her library association.

**Registration Fee:**

\$1000 (Meals, single-occupancy room for 5 nights, workshop and support materials)

Airfare, mileage, or ground transportation reimbursement to the institute site is not provided. The participant must provide or find funding for transportation. The institute will provide some shuttle service to and from the airport.

**Application Process:**

Apply online by 30 April 2004.

**Other:**

Seattle, WA is the closest major airport. PNLA will provide some ground transportation.

If you have questions concerning the PNLA Leadership Institute, please contact Susannah Price, Institute Coordinator: [sprice@cityofboise.org](mailto:sprice@cityofboise.org)

PNLA Member States: Alaska, Idaho, Montana, Oregon, Washington

Member Provinces: Alberta, British Columbia

# PNLA Leadership Institute @ Dumas Bay

**Application to Participate**

Name: \_\_\_\_\_  
 Home Address: \_\_\_\_\_  
 City: \_\_\_\_\_  
 State: \_\_\_\_\_  
 Zip Code: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Library Address: \_\_\_\_\_  
 City: \_\_\_\_\_  
 State: \_\_\_\_\_  
 Zip Code: \_\_\_\_\_  
 Library Phone: \_\_\_\_\_  
 Library Fax: \_\_\_\_\_  
 Preferred email: \_\_\_\_\_

**Education:**

Undergraduate Degree (not required)  
 Institution: \_\_\_\_\_  
 Degree: \_\_\_\_\_  
 Date: \_\_\_\_\_

Library Masters Degree (not required)  
 Institution: \_\_\_\_\_  
 Date: \_\_\_\_\_

Other Academic Degree(s) (not required)  
 Institution(s): \_\_\_\_\_  
 Date(s): \_\_\_\_\_

**Current Employment Institution:**

From: \_\_\_\_\_  
 Current Position: \_\_\_\_\_

**Previous Employer:**

From: \_\_\_\_\_  
 Position: \_\_\_\_\_

**Previous Employer:**

From: \_\_\_\_\_  
 Position: \_\_\_\_\_

**Previous Employer:**

From: \_\_\_\_\_  
 Position: \_\_\_\_\_

State Association Member: \_\_\_\_\_  
 Provincial Association Member: \_\_\_\_\_  
 Current PNLA Member Since: \_\_\_\_\_

On a separate sheet, please describe:

- a) Your leadership roles in your professional positions and/or outside activities past and present and
- b) How you anticipate implementing what you learn at the Institute, including your leadership goals for the next 5-10 years.

Please limit response to one page

**References**

Name: \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Relationship: \_\_\_\_\_  
 Phone: ( ) \_\_\_\_\_  
 Email: \_\_\_\_\_

Name: \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Relationship: \_\_\_\_\_  
 Phone: ( ) \_\_\_\_\_  
 Email: \_\_\_\_\_

Name: \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Relationship: \_\_\_\_\_  
 Phone: ( ) \_\_\_\_\_  
 Email: \_\_\_\_\_

Send to [kayv@wsu.edu](mailto:kayv@wsu.edu)

# PACIFIC NORTHWEST LIBRARY ASSOCIATION

## INSTITUTIONAL/COMMERCIAL

New [ ] Renewal [ ]

JULY 1 - JUNE 30

I understand that \$20 of these membership dues covers the subscription to the PNLA Quarterly.

Signature \_\_\_\_\_

Name of Institution, Company or Organization \_\_\_\_\_

\_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Zip/Postal Code \_\_\_\_\_

Phone \_\_\_\_\_

FAX \_\_\_\_\_

Email \_\_\_\_\_@\_\_\_\_\_

Designated Voting Rep. \_\_\_\_\_

Phone \_\_\_\_\_

Check membership category required:

**INSTITUTIONS**

Annual gross budget:

- Up to \$49,999 \$ 35.00
- \$50,000 to \$99,999 \$ 55.00
- \$100,000 to \$499,999 \$ 75.00
- \$500,000 to \$999,999 \$100.00
- \$1,000,000 and over \$150.00

**COMMERCIAL** \$100.00

Amount Enclosed \$ \_\_\_\_\_  
(in the currency of country of residence/incorporation)

**PLEASE MAKE CHEQUE PAYABLE TO:**  
Pacific Northwest Library Association (PNLA)  
Membership Chairperson  
80 Baker Cres. NW  
Calgary, AB T2L 1R4  
Canada

## PERSONAL MEMBERSHIP

New [ ] Renewal [ ]

JULY 1 - JUNE 30

I understand that \$20 of my membership dues covers my subscription to the PNLA Quarterly.

Signature \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Zip/Postal Code \_\_\_\_\_

Place of Work \_\_\_\_\_

Position \_\_\_\_\_

Work Phone \_\_\_\_\_

FAX \_\_\_\_\_

Email \_\_\_\_\_@\_\_\_\_\_

Annual gross salary (in the currency of your country of residence)

- Up to 9,999 ..... \$30.00  
(Includes retired, unemployed or not employed in the library field)
- \$10,000 to \$19,999 \$40.00
- \$20,000 to \$29,999 \$50.00
- \$30,000 to \$39,999 \$60.00
- \$40,000 to \$49,999 \$70.00
- \$50,000 to \$59,999 ..... \$80.00
- \$60,000 and over ... \$90.00

Amount Enclosed \$ \_\_\_\_\_  
(in the currency of country of residence)

I would be willing to serve on:  
the PNLA Board Yes \_\_\_\_\_  
PNLA Committees Yes \_\_\_\_\_

Circle interests (PNLA will help you connect):  
Academic Management  
Intellectual Freedom Reference  
Resource Development Serving Christian Community  
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