

# Keepers of Odd Knowledge

## HISTORY AND FUNCTIONS OF THE HISTORICAL REFERENCE BRANCH

by Annette Amerman<sup>1</sup>

Housing compact shelves filled with files, History Division's Historical Reference Branch may look like an archive, but it is not.<sup>2</sup> The term *reference* may conjure images of a library, yet the Historical Reference Branch is much more. It is staffed not with archivists or librarians, but with historians—yet these historians are not tasked with writing monographs like the other historians of the division. These facts make the Historical Reference Branch something of an enigma within the division. This piece seeks to provide clarity on how the Historical Reference Branch came into being and how it fits into the larger mission of the History Division, its current role and responsibilities, and its future.

### Origins of the Branch

When discussing the Historical Reference Branch, one must also discuss its founding father, Joel Davis Thacker. In 1931, Headquarters Marine Corps (HQMC) hired Thacker, a decorated U.S. Army veteran of World War I, to organize and review the muster rolls of the Marines that served in the war. His skill, knowledge, and creation of better procedures

for completing this task led to a special mission of conducting research in medical and other records of the Army, Navy, and Marine Corps concerning Corps personnel in the Great War. As a result of this work, hundreds of Marines were awarded long-delayed medals and monetary benefits authorized by law. While carrying out his special mission, Thacker was in close and continual contact with the Historical Division of the Marine Corps by assisting in the preparation of numerous historical materials and by organizing and adding valuable materials to the Corps' archives. In June 1942, Thacker transferred permanently to the Historical Division where he was dubbed the resident "answer man" as he quickly became the historian who handled all inquiries from Marines and the general public.<sup>3</sup> As Thacker's career progressed within the division, he collected documents, papers, clippings, and more so he could answer more questions. These were the first steps in the creation of what is today the working files collection of the Historical Reference Branch.

For all his work, Thacker was designated as historical advisor to the Corps in 1951, for his rapid, professional and historically accurate response to requests from across the Marine Corps, including the Commandant of the Marine Corps. Thacker's official title was the head of the Records and Research Section, which was devoted to the combined functions

---

<sup>1</sup> Annette Amerman is the head of the Historical Reference Branch, Marine Corps History Division. She started with the History Division in 1995 as an intern, and later as a research assistant. She returned to the division in 2003 and was promoted to branch head in November 2017.

<sup>2</sup> Today's Historical Reference Branch has undergone many name changes in the course of its history; for ease of reading, it will simply be referred to as *Reference* or *the branch* throughout.

---

<sup>3</sup> Bill Kreh, "The Marines' Answer Man," *Sunday Star*, 29 June 1952.

of the archives and historians conducting research in response to requests. This section held a variety of materials, such as official records, published works (books, magazines, and newspapers), and the working files established by Thacker. Eventually, the section's activities expanded beyond its original scope, with its historians fielding increasing numbers of requests for information. Conducting research into those records and printed materials in order to answer inquiries dramatically degraded their ability to achieve their primary missions. In 1957, after decades of military and civilian service, Thacker retired, leaving behind a distinguished career and an office capable of handling the varied and multiple requests for information received.<sup>4</sup>

By 1966, the old Records and Research Section was reorganized into three separate sections: Archives, Library, and Historical Reference sections. This separation allowed the historians in Reference to strictly focus on the historical requests for information that did not fall under the other two sections while enabling the archivists and librarians to focus on their tasks. The archivists were charged with the collection, arrangement, preservation, and access to the official records. Similarly, the librarians were charged with the maintenance of information in published format and with providing access to them.

In answering questions, the Reference historians provided context to the bare facts of history as well as advice regarding other resources, helped shape the product the patron was attempting to create (dissertation, article, book, etc.), and assisted the layman to understand the Corps' history. For instance, when the patron did not have a clear focus to their final project, the historians of the branch could act as a sounding board and offer suggestions to assist in the project's development. When family members needed to understand elements of their Marine's service—whether a service record, the history of a unit, or general historical context—the historians of the branch helped that family. This primary function of Reference remains today.

## Expansion of Roles and Mission

Since the separation of the three sections, the historians in Reference have remained focused on answering a broad spectrum of inquiries. To respond rapidly to requests, Reference still uses Thacker's system of working files. Originally housed in black vertical filing cabinets, the branch's working files now are housed in a compact shelving unit that is 19 feet long and 11 feet tall. The working files are organized into four groups: biographical, subject, unit, and photographic.

The biographical files are organized by name and contain information on prominent, famous, and infamous Marines of the past, such as former Commandants of the Marine Corps, Medal of Honor recipients, Lee Marvin (famous), and Lee Harvey Oswald (infamous). The files may contain copies of newspaper articles, brief biographies (usually less than 10 pages), copies of portions of the individual's official military personnel file (OMPF), or even copies of their own correspondence and notes created by branch historians.

The subject files contain subcollections on a variety of topics from abbreviations to youth programs and can contain copies of extracts from official records, newspaper clippings, articles, brief histories, reports, and correspondence from branch historians relevant to the topic.

The unit files are the fastest growing working file group, as the files as the Corps' force structure changes, units continue to deploy, and historians continually update units' lineages and honors. These files can contain copies of records, listings of commanding officers, brief histories, and research materials collected by the historians for lineages and honors, among other documents that may be helpful in future efforts.

The photographic files are printed copies of photos held by the National Archives and Records Administration, but are strictly Marine Corps related. The collection was created when prints were made in support of the Marine Corps Museum, then located in Building 58 at the Navy Yard in Washington, DC, and to support historical manuscripts published by the division. As use of digital imagery increased, the need to obtain prints from the National Archives decreased,

<sup>4</sup> Joel D. Thacker biography, Biographical File, Historical Reference Branch, Marine Corps History Division, Quantico, VA.

so Reference's collection ends around the time of Operations Desert Shield and Desert Storm.

As the Corps continues to create history, Reference adds to its working files to assist in fulfilling future requests. As the bulk of the files contain copied materials, either from newspapers, official records, reports, and products created by the historians in the branch, they do not fall under the Department of the Navy's or the Marine Corps' records management manuals for retirement to the National Archives.<sup>5</sup> The files are unique in their singular focus on the Marine Corps and their wide range of coverage, and they may include information covered by the Privacy Act of 1974. For these reasons, they are noncirculating and individuals outside of the branch are granted access only in the branch researcher room, much in the way a library does not allow borrowing of its reference books.<sup>6</sup>

While answering requests was how the branch came to fruition, the mission has grown in the years since Thacker's departure. As an extension of the mission to provide assistance to researchers, the section compiled and published chronologies covering the periods "1935-1946 and 1947-1963, bibliographies, and various reference publications."<sup>7</sup> In 1968, the Marine Corps created the Lineage and Honors Program to track the administrative and operational histories and cumulative battle honors of eligible Marine Corps units, mirroring the program of the Army.<sup>8</sup> Since its

inception, the Lineage and Honors Program has been administered by the historians of Reference. At the outset, the program issued certificates only to the fighting regiments; today, the list of eligible units has expanded to nearly 450. Having the responsibility for the program expands the historians' knowledge of the general history of Marine Corps units and enhances their research skills in the official records held by the division. The last major expansion of responsibilities for the branch came in 1976, when the Commemorative Naming Program was transferred to the Historical Division from the Logistics Division and assigned to Reference.<sup>9</sup> The knowledge of prominent and famous Marines of the past held by the branch makes it easy for the historians to vet naming candidates and even offer suggestions of potential candidates.

## Changes to Mission

The number of requests received by the branch reached a peak of around 8,000 per year in the early 1990s, fueled particularly by requests for assistance regarding the use of Agent Orange in Vietnam and coinciding with commemorations of the 50th anniversary of World War II. In the years since, the number of requests received has decreased, largely due to the availability of information on the internet. However, the complexity and level of effort and time needed to respond has increased dramatically. Many questions are received from HQMC offices, such as the Commandant's Staff Group, the Strategic Initiatives Group, and Plans, Policies and Operations, requesting speech support, fact checking, preparation for overseas visits to battlefields, and planning for the future of the Corps' force structure. One of the more interesting examples of recent HQMC requests was regarding force structure and history of Marine Corps combat service support since World War II and the historic roles and missions of the Marine Corps since the end of World War II.

Requests from family members of Marine veter-

<sup>5</sup> The Department of the Navy's (DON) *Records Management Manual*, SecNav M-5210.1, and the *Marine Corps Records Management Manual*, MCO 5210.11F, establish policies and procedures for lifecycle management (creation, maintenance, use, and disposition) of DON and Marine Corps records. The manuals provide guidelines and procedures for the proper administration of a records management program. Both contain all DON and Corps records disposition schedules approved by the National Archives.

<sup>6</sup> The Privacy Act of 1974, broadly stated, is to balance the government's need to maintain information about individuals with the rights of individuals to be protected against unwarranted invasions of their privacy stemming from federal agencies' collection, maintenance, use, and disclosure of personal information about them.

<sup>7</sup> Col Frank C. Caldwell, "Every Marine an [sic] Historian," *Marine Corps Gazette* 50, no. 3 (March 1966): 37.

<sup>8</sup> Annette D. Amerman, "A Milestone Anniversary: The Marine Corps' Lineage and Honors Program," *Fortitudine* 34, no. 3 (2009): 13.

<sup>9</sup> LtCol Robert B. Newlin, "This High Name," *Marine Corps Gazette* 70, no. 11 (November 1986): 82.

ans often require considerable time and patience to explain that which Marine Corps historians take for granted, such as deployment patterns, ranks, command structure and general information on specific battles or wars. Families of Marine veterans have become more interested in the minute details of their relatives' service than just the overview provided in a military service record. Branch historians work with them to understand the context of their relatives' service.

In decades past, it was primarily the general public who submitted requests, but today it is the Marines of the operating forces that comprise the largest part of the branch's patron base. On average, the bulk of the requests are received from three groups—35 percent from Marine Corps units around the globe, 30 percent from the general public (including veterans and their families), and 15 percent from other staff within the division; the remaining 20 percent come from external academics and professional historians, HQMC, the Department of the Navy, and other government agencies. The overwhelming majority of the requests received come in by email (75 percent), followed by telephone requests (20 percent), with the rest from in-person visitors.

The Lineage and Honors Program remains one of the most time-consuming aspects of the branch's responsibilities. More than 450 units are issued certificates that give a snapshot of their histories and list their cumulative battle honors earned. To compile this overview, a historian must comb through the command chronologies submitted by the unit and any other official record of the unit's activities since the last certificates were issued. This process requires close coordination with the unit to ensure all operational deployments are captured accurately, as well as with HQMC's Military Awards Branch to confirm all unit awards are corroborated and legitimate. Researching, reviewing awards, drafting, editing, and preparing lineage and honors certificates can take upward of 8–10 hours to complete per set.

Over the past 15 years, there has been a dramatic increase in requests for digital responses from branch

patrons. However, at least 97 percent of the working files within Reference remain in their original, non-digital state. To meet this demand, there have been attempts to digitize the working files, beginning in 2005; however, none have been enough to digitize the entire collection. When possible, using outside contractors, a portion of the files have been digitized and are available upon request, such as the biographical files, casualty cards (wounded, killed, and missing from WWII to Korea), and lineal lists (lists of Marine officers in order of precedence). The members of the branch are also digitizing materials on demand in response to requests. To move forward with digitization and online access to the branch's materials, a historian is now designated as the collection and online content manager in addition to their regular duties; this historian is creating file inventories and research aids to better assist patrons and branch historians alike.

In addition to the established responsibilities, the branch historians are increasingly providing presentations and short lectures to civic organizations, Marine Corps units, and academic conferences on a variety of topics such as Belleau Wood, World War I aviation, Navajo code talkers, Tarawa, the Combined Action Program, and prominent Marines of the past, just to name a few from the past year. While many presentations can be recycled and tailored to the specific audience, each presentation is designed for the specific audience and the theme of their event.

## Moving Forward

The branch is committed to providing sound historical information in a timely manner to its patrons. If the historians of the branch do not know the answer to a question, they endeavor to find out—not just because it was asked but because it expands their knowledge and abilities for future requests. Therefore, the collective corporate memory of the branch is critical.

To give patrons more information, the branch is considering reengaging in publishing products such as topical anthologies, annotated bibliographies, and other research-centric works, as well as updating brief unit histories. Such published products are within the

scope of the branch's mission to help researchers understand the history of the Corps. It is true that the Historical Reference Branch does not fit into any pre-defined mold. However, the functions that the branch

fulfills are essential to the overall mission of the History Division to serve Marines, scholars, the general public, veterans, and their families alike.

• 1775 •



## **Society for History in the Federal Government**

(SHFG)

[www.shfg.org](http://www.shfg.org)

SHFG brings together government professionals, academics, consultants, students, and citizens interested in understanding federal history work and the historical development of the federal government. Join us for our annual conference, honorary lectures, workshops, and gatherings.

Members receive our newsletter, *The Federalist*, the journal *Federal History*, our eBulletin, and news of Society events.

Join SHFG at [shfg.wildapricot.org/join-us](http://shfg.wildapricot.org/join-us)