

The Rise and Fall of the Blue Book: An Examination of Essay Exam Books

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In recent years, as electronic testing has become more popular it has replaced other forms of testing. Utah State University's Fall 2016 English 3470 Approaches to Research in English Studies course decided to research what was happening to one of those forms, the blue book, via historiography, textual analysis, faculty interviews, and a survey of students. We found a less significant decline in use of blue-book exams than expected, one reason being that faculty members are more concerned with cheating with computerized exams than with blue books. Students, however, prefer computerized exams and have more anxiety with blue books. While we predict a continued decline in use of the blue books, our research suggests they may not disappear entirely.

Although blue books have been a pervasive presence on college campuses for more than a century, they have received little scholarly attention as an instrument for handwritten essay examinations. This study seeks to close that gap with a comprehensive investigation of their history, functions, and uses. Could a tool that has been in use in higher education institutions for such a long time conceivably become an anachronism? We embarked on our project with these questions in mind:

1. Why do faculty members use blue books?
2. What is the future of the blue book?
3. How do students feel about blue books?

Research Methods

Our research team was comprised of the 16 English majors in English 3470, Approaches to Research in English Studies, taught by

Dr. Joyce Kinkead in Fall 2016. Almost all of us had experience in taking blue book exams. Because the study we designed included interviewing faculty members and surveying students, our protocol was reviewed by USU's IRB, and all members of the research team were certified in human subjects research.

We interviewed eleven faculty on their use of blue books, and used a Qualtrics survey to query 185 students about their perceptions of blue books. Our mixed-methods approach also involved historical and contemporary textual analysis, which broadened our base of knowledge beyond our own campus: our analysis includes several articles on the use of blue books specific to individual campuses. From our interviews and surveys we developed an empirically based framework to address our research questions regarding the current use of blue books and their potential future.

We were guided, in part, by Robert

Connors' exemplary study, "The Rise and Fall of the Modes of Discourse," which traced the dominance of an approach to teach writing. "More students have been taught composition using modes of discourse than any other classification system," according to Connors (444). He calls a study of their history an "instructive one" (444). The rise of the blue book, beginning in the late 19th century, parallels the ascendancy of the modes of discourse as an instructional strategy, and we believe that an analysis of its history and use can also be instructive. In the following, we define blue books and their history, describe perceptions about blue books by faculty and students, explore their economics, uncover other uses, and discuss testing alternatives in order to determine if the blue book has a place on college campuses today.

What are Blue Books?

Blue Book:

- a: multiple pages of lined, white paper bound in book format with a blue paper cover; generally used for collegiate exams.
- b: a university testing tool used to incite fear in students and frustration in professors.
- c: a guide for a widely used uniform method of citation in law school ("Blue+Book"); also used commonly in legal documentation, and a large portion of U.S. courts; sometimes referred to as the legal bluebook.

The blue book that we explored in this study is most commonly used as a tool for essay examinations administered on college campuses. It can be, and is occasionally, used

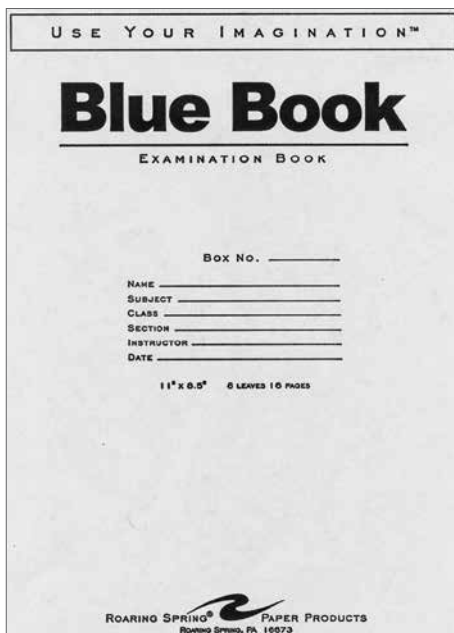
for other purposes, but most of the time if a university professor or student uses the term *blue book*, the reference is to a written exam. A blue book consists of approximately 16 pages of lined white paper that is bound inside a blue paper cover. They are available in different sizes, and some examination books actually come in a green rather than blue cover. Over the course of the last century, this examination booklet has become commonplace in most U.S. universities and is a staple of campus bookstores.

The Production of Blue Books

Blue books are manufactured by a number of different publishers, but share many common traits. Some of the top producers of blue books in the U.S. are Roaring Spring Paper Products, BookFactory, CNC Testing Forms and Supplies, and Comet School Supplies. The most popular sizes of blue books are 11 x 8.5 and 8.5 x 7; however, blue books may come in different sizes, depending on the subject content area of the exam. Pages are generally legal ruled with 11/32 in. spacing between horizontal lines and margins lined 1¼ in. from the edge of the page. The most popularly used contain 16 pages (eight sheets total front and back made from four larger sheets) although some may be as long as 24 pages. Most blue books are printed with an area on the cover for the test-takers to fill in name, subject, class, section, instructor, and date. Some will also include areas for their exam seat number and their graded score.

Roaring Spring Paper Products, which claims to be the "Home of the Blue Book," also creates a "Green Book," appealing to campuses that have adopted sustainability standards. Comet School Supplies produces a version of the blue book that is 100 percent

recyclable and made from 30 percent post-consumer recycled materials. All publishers produce generic blue books; however, the major distributors print booklets that can be customized to the postsecondary institution with the school logo or other identifiable markings, tying the examination booklet to the school. For example, the campus store at Utah State University has taken advantage of the back cover to print an advertisement for itself. Most blue books reserve this back cover space for comments from the professor and the final score of the exam.



One example of a blue book cover.

The Rise of the Blue Book

The beginnings of blank, bound, examination booklets are of contested origin. Butler University is often cited as the original source in the 1920s, and its school color is blue; but our research suggests otherwise. Harvard began requiring written examinations for some subjects in 1852; in 1857, the institution standardized testing across all studies, replacing recitations with written final exams, and according to the *Harvard Gazette*, it is believed this is the first year a bound booklet of paper was introduced. The institution provided a standardized format using inexpensive paper at a time when paper was still a precious commodity. Professor of Greek Studies Evangelinus Apostolides Sophocles despised the new format and burned the blue books unread. He believed that examinations as a whole were not representative of learning, and the bound book format only encouraged students to cheat to make up for poor work habits (“This Month”).

It is unclear which companies would have been manufacturing the booklets in those early years, and if they were blue, or any particular color at all. Roaring Spring capitalized on the new technology that switched from rags to wood fiber to make paper and began production in 1865. The idea of the booklet spread to other universities, including Yale by 1865, and Notre Dame by 1885–1887. Other colleges followed suit. In 1900, Roaring Spring expanded its facilities as the exam booklets were adopted more widely (Marberg).

Theories about the blue covers include one on the early manufacture of paper from recycled rags. Blue Naval uniforms were often recycled into one of the cheapest options of paper, making it economically a smart

choice for the cover (Weiss). Other stationery products even before this time were blue for the same reason. Regardless of the origin of the color, the booklet's use became widespread throughout the twentieth century, and the term blue book entered the lexicon of college students, often with dread.

Faculty Interviews: Perceptions of the Use—and Future—of the Blue Book

In order to more fully understand the blue book and its use in classrooms, we interviewed eleven professors at USU. They came from three different disciplines—English, history, and political science—and ranged in teaching experience from seven years to over thirty. It seemed that faculty in humanities and social sciences disciplines are more likely than other disciplines to use blue books, as they require essay examinations more commonly. This is particularly true at a state university where large class sizes in some disciplines almost necessitate testing by Scantron forms. Nine of the eleven professors who were interviewed used blue books at the time for examinations, and almost exclusively for essay exams. The remaining two have both used blue books in the past, but do not currently employ them in the classroom. The information gathered from the interviews revealed recurring themes regarding the use of the blue book, as well as some interesting patterns in perspective regarding cheating, legibility, and the future of the blue book.

Perceptions on Use(s)

For the most part, the use of the blue book in the classroom is straightforward: almost exclusively for essay examinations, or exams that include at least one essay or long answer section. Most of the professors

who we interviewed currently teach major-specific classes only, and indicated that they use the blue book primarily for midterm and final exams. A few did, however, indicate that they used the format more readily in their lower level courses. At least one professor indicated that blue books are used in introductory courses, specifically large lecture-based classes of 100+ students. For these large classes, professors might employ the use of three to five undergraduate teaching assistants (UTA's) who grade objective material like fill-in-the-blank, and one or more graduate assistants (GA's) to grade subjective material like long answer and essay questions. Though this professor realized that this method sounded burdensome, they added that "The study of history relies on written tests, so blue books are important."

The issue of students forgetting to bring blue books was a universal one, since the professors require the students to bring their own. In such cases, professors had various ways of remedying the problem, including allowing students to staple together loose leaf paper or by bringing a few extra blue books for students to purchase (the money going back to the department). Another common phenomena noted by the professors was that other students would bring extra copies for their peers to have free of charge. Since students at USU purchase their own blue books, a few professors pointed out that at other institutions they had attended or previously taught, students were not allowed to have access to the blue books, reducing the possibility of cheating. One teacher said, "I would grab two hundred blue books from the copy room before a test. It was never a problem if a student forgot because I supplied them... This also stops almost all forms of cheating."

Perceptions on Cheating

Cheating can happen on any exam, but most of the professors seemed unworried about the possibility of cheating. However, despite this fact—and though the majority of the faculty members could not think of any instances in which they had caught a student cheating on a blue book exam—all of the professors interviewed have, at one point or another, taken some measure to prevent such a possibility. The most common preventative technique was to collect the blue books provided by the students and redistribute them. This eliminates the student's ability to write notes and/or answers in the book before entering the exam. With regard to other cheating techniques, professors view blue books as relatively foolproof. Their belief in the difficulty of cheating with blue books juxtaposed with a mass belief in the ease with which students might cheat if taking exams with computers. Though all of the professors conceded that eventually computerized testing would become more viable, their main concern at the prospect was how easily students might find ways to cheat using the Internet.

Perceptions on Legibility

When asked about the issue of legibility, all but one of the professors agreed that being able to read the essay answers can be an issue when trying to grade students' exams. One professor, upon being asked about handwriting, threw her head back and laughed out loud. Another faculty member put his head down on the desk. Most professors, however, were sympathetic with students' poor handwriting, conceding that they themselves had less than stellar penmanship and couldn't fault students too

much. Most said that they simply spent more time with the essay, trying their best to figure out what the student had written. One said that, if necessary, the student would be asked to come in and rewrite the original essay. Another, diverging from the relative good-will toward bad handwriting, said, "It's up to the student to fix it, and learn it." Only one professor did not think that legibility was an issue, stating, "That never happens. It's a rare instance when I need a student to clarify a string of words. It's never been a problem where I couldn't read them."

The question of grading bias against bad handwriting did not seem to be an issue for the eleven professors we interviewed. None of them indicated preferential treatment of legible handwriting, all instead focusing on the content and knowledge demonstrated by students. Interestingly, one professor who no longer uses examination booklets cited the issue of handwriting as his impetus. This professor posited that good handwriting was a sign of privilege and indicated class differences among students, and in an effort to reduce possibility of favoring more privileged students, stopped using blue books.

The issue of legibility, like cheating, also influenced professors' views of the feasibility of computerized essay exams. For the most part, even if a professor seemed to be against computerized tests, they noted that typed exams would eliminate the problem of legibility. One stated that using a computer to type an essay exam might even be more fair for students, since professors perceive that students today are more proficient at typing than handwriting. Whether or not professors agree with computerized testing personally, most are amenable to the

wishes of their students, stating that if their students preferred a typed test, and an appropriate secure computerized testing environment were available, they would be willing to change their methods.

Alternatives and Perceptions on Longevity of Blue Books

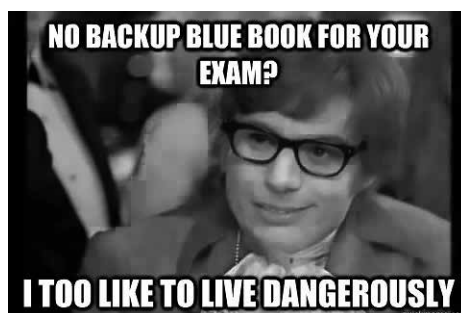
Of the professors that we interviewed, none had any misperceptions of the rapid onset of technology-based testing alternatives. However, many stated that they did not know enough about such alternatives to feel confident using them. One professor admitted, “That’s one thing I haven’t come to grips with. What possibilities that would have. I haven’t explored the possibilities that are there yet. I know other schools have testing centers but I don’t know how they do it... blue books might be done away with.”

Recently, USU opened a new testing center with the possibility of administering proctored, computerized tests; the center itself has 200 laptops meant for such testing and the ability to monitor each screen. However, many of the professors worry about the effects of the change in environment from the classroom—a place of learning—to a place of testing, the absence of a knowledgeable source (the professor) for answering clarifying questions students might have about the exam itself, and whether or not learning retention is affected by the process of handwriting versus typing. However, when asked about whether or not the blue books have “staying power,” the overarching consensus of the professors interviewed was that long term, electronic testing will lead to the less frequent use of the blue book.

Blue Books and Bookstores

Blue book sales differ from university to university. Some campuses supply green books, blue books, or both. An institution’s tightening finances may lead to a change in whether or not examination booklets are provided *gratis* to students. For instance, Concordia University, a private liberal arts college in Minnesota, made a policy change in May 2016; the registrar’s office would no longer supply books to instructors. They informed departments that they would need to decide if they would be covering the costs or if students would (Concordia).

Sales of blue books in campus bookstores can provide trend indicators. In 2014, the USU bookstore sold 10,089 blue books, and in 2015, only 7,931(Hales). This decrease could indicate that the campus of 27,000 students is seeing a decline in essay examinations, in blue book use, or both. According to a 2013 alumni magazine article for the University of Virginia, which has a student population of 21,000, its bookstore orders about 17,000 blue books and 10,000 green books a year for students to purchase during exam time. The use of examination booklets can be influenced by class size, institutional size, and tradition (Larson).



An Austin Powers meme teasing people who only purchase one blue book at a time.

Students and Blue Books

We have discussed how students use blue books in test examinations; however, how accessible are these examination booklets for the students who must supply their own? And, have they outlived their usefulness? In an opinion piece, “Blue Book Blues,” in the Oakland University campus newspaper, a student argued that notebook paper would be a suitable substitute (Wolchek). He also pointed out there is frustration because students are “already spending thousands of dollars” on college tuition. Students shopping for blue books at the last minute may find themselves in long lines with others in the same situation. And for some students unfamiliar with a blue book, they may have never realized they needed to purchase one for exams. The lack of the required examination booklet may introduce unnecessary additional stress for test-takers.

Blue books, regardless of the publisher, are fairly inexpensive, typically under one dollar, but their prices differ according to retailers and campus stores (Fleming). On the other hand, blue books provided by the institution can reduce student costs. Northern Illinois University’s bookstore “hands out blue book exams for free” (Nadig). NIU argues that if a student is required to print and submit an exam essay, then “the cost of printing is pushed on the students.” NIU believes that saving “seven cents a page” is one way that blue books are a more “cost-effective measure” for students to take exams without any cost to them. An abiding tension with examination booklets is “who pays for them?”

Student Survey Responses

To fully understand how blue books work, we questioned the end user. Students who had just taken a blue book exam in a history

course were invited to complete a Qualtrics survey. Fifty participants, with the majority being first-year or sophomores, answered the survey with Aggie Ice Cream as an incentive. The students who participated in the survey came from varied fields of studies, including the arts, business, education, engineering, humanities, sciences, and social sciences.

Preferences and Use

Most students answered that they have used a blue book at least two or three times. Knowing that most of these students are first-years or sophomores shows that these students have used blue books quite frequently in their short time at USU. Most such examinations occur in humanities and social sciences. There were only two to three responses for the other subjects listed, while humanities had 29 responses and social sciences at 32. Of 50 respondents, half—25—indicated they had never used a blue book; 13 regularly had, and 12 did sometimes.

Students slightly prefer scantron multiple-choice exams to essay examinations. Another preference that was close between the students was typing versus hand writing essay exams; more respondents preferred to type. Students also tended to prefer the blue book format over regular, lined paper. Students agreed that most teachers take at least more than a week to get the results of the exam back to the students.

Purchase and Anxiety

We were rather surprised that 60 percent of respondents thought that the teacher should provide the blue books and 40 percent felt that they should buy the book themselves.

Most students purchase their blue books at least a day in advance of the test. Figure 1

depicts how early students purchase the blue book prior to the exam. Overwhelmingly, students agreed that blue books are readily available for purchase.

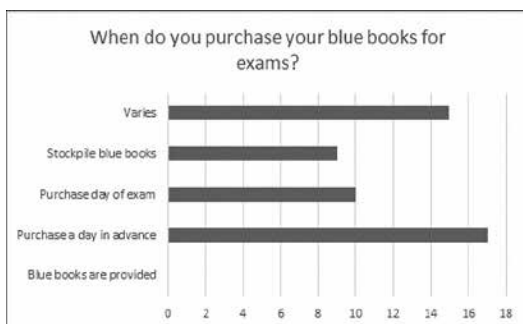


Figure 1
How early students purchase blue books before an exam

Do blue books contribute to test anxiety? Almost 50 percent of students noted that their anxiety increased to some degree while 35 percent said there was no increase, and 15 percent were neutral.

Student responses let us draw some conclusions about the blue book's use on campus. Overall, students feel that they would rather take a scantron exam, but if they have to take a written essay exam, they would prefer it to be with a blue book. We only had one question about technology, but more students agreed that if they had the option, they would rather type their essay responses. This survey shows that blue books are familiar for students, but that they are open to change in the form of technology.

Advice for Success on Blue Book Exams

Blue-book essay examinations have spawned several advice websites for students taking them. By offering strategies and reducing stress for students who may be new to the blue book world, these free sites likely obviate test preparation books such as Galica's *The Blue Book: A Student's Guide to Essay Exams*. According to Galica, the blue book allows students to "express their ideas and teachers to evaluate that expression." Students should have an understanding of the kinds of questions that will be on the test. They should properly study and have ideas in order of how they would like to respond to them during the exam.

Leanne Powner's website "Maximizing Your Grade on Blue Book Exams" advises students to be familiar with the blue book format and plan ahead. While most essay exams are timed, students should create an outline and "simply take a moment to gather ideas on scratch paper and organize before they start writing" to make the most of the time allotment. For those who run out of time writing, "many graders will give partial credit for the outline, which shows that [the writer] knew the information and were going somewhere with it." It is also important to know that the instructor "can only grade what a student writes in their blue book." Because many exams are multi-part or the choice is given in which ones to answer, it is important to "read the entire exam before they write anything." One approach "may be to tackle the questions that are worth more, or those they feel they can do best, or the ones that will take the most time."

Professor Robert A. Hatch of the University of Florida advises, “As students work their way through the body paragraphs—as specified in their brief outline—they need to remember that each assertion needs an example as evidence but ‘not exactly opinion’... The value of what students say depends on the argument and evidence they provide.” In general, specific, concrete evidence is crucial. Lastly, students are advised to “always try to leave a few minutes at the end to look over their essay.” They won’t be perfect, but it should be clear, logical, and easy to read. At times it is difficult to write well while writing fast, but Hatch encourages them to “try their best.”

The Problem of Cheating

Some who do not follow advice on how to prepare effectively to write essay examinations may be tempted to cheat. Colleges typically publish their academic integrity policy in regards to academic honesty. For instance, Concordia University in Minnesota defines how “Facilitating Others’ Violations” is also cheating and specifically includes cheating with blue books: “Laying out a Blue Book to give another ready access to responses” (“Academic Code of Conduct”).

In spite of such policies, cheating does happen. The International Center for Academic Integrity reports that 68 percent of undergraduates admit to cheating on tests or written assignments (McCabe). Faculty members have used several methods to deter cheating, including collecting blue books and re-distributing them. It is also one reason why faculty or their institutions supply blue books and also why some institutions order the examination booklet in various colors for different semesters (Marberg).

In a Facebook post on “Cheaters [sic] How to Cheat: Techniques Used by Cheaters,”

Juzar Bhanpurawala offered a guide to teachers exposing common methods of cheating. This tongue-in-cheek guide specifically mentions how to cheat when using blue books:

1. **Fluorescent Pen:** Student writes on “blank” blue book or scratch paper with invisible ink—visible only when ultraviolet light is shined on it. Thousands of cheap ultraviolet light pens are sold annually.
2. **On exams for which you have to bring you [sic] own paper or test booklets, write all the information that you need in and [sic] outline form.** If an instructor asks you about the outline (though doubtful) simply explain that it’s a pre writing work to help you organize better for the actual essay or problem. To let you know, I think many people across the country have used this method on bluebook exams. It works, and is very hard to catch, just make sure your teacher doesn’t collect them at the start of the exam, and redistribute them.

The folklore of the “lost blue book” has been documented by scholars (Girdler, Brunvand). The legend goes that a student has two blue books. On encountering two essay questions where for the second question the student knows the answer, but not so for the first one, the student writes a plausible last sentence or two for the first question in the blue book labeled “2,” and writes a passing answer for the second question. Only the blue book labeled “2” is submitted, and later, the professor apologizes for “losing” the supposed blue book “1” that never existed. The student receives an A.

Blue Books in Institutional Development and Fundraising

While blue books are commonly associated strictly with their purpose for examinations, colleges have also used them in advancement and fundraising. Once students have graduated, they may begin to look at the blue book more fondly, as a rite of passage. Barnard College sent out mailers in intriguing envelopes to capture the attention of those they sought donations from. Inside this large and heavy envelope was a familiar sight: a blue examination book. The gimmick of the examination book was designed to cause alumni to reflect on their own college memories, making them more likely to make a donation (Weiss).

Besides using the examination books as a tool to collect donations, they are also useful in fundraisers. Wayne State University's alumni association hosted an event in which current students could learn how to be involved with alumni. Along with other items, a "finals relaxer exam kit" was given to 500 students. Each kit contained a blue book for examinations, scantrons, Smarties candy, a stress ball, and an information packet about getting involved (Sandlin and Helwig).

Sandlin and Helwig's *199 Fun and Effective Fundraising Events for Nonprofit Organizations* also describes "College Care Packages" and advises that examination booklets are included. The authors argue that blue books are required for many examinations in college courses, and when they are given away for free, it tends to get students' attention. Utilizing them as a tool for advertising has proven to be very effective and beneficial to both the college, and the students.

The Future of the Blue Book

The decline of blue books has been forecast for some time. Weiss, a reporter for the *Los Angeles Times*, predicted that floppy disks would replace blue books. Floppy disks have come and gone, but the blue book perseveres. "We've advanced in so many things and yet that's how we're still evaluating students...it's just absurd" (Smolo).

Why hasn't technology replaced hand written examinations? One challenge that prevents professors from abandoning blue books is cheating via the Internet. Faculty have been wary about switching to a word processing format, fearful that cheating would become more prominent. Several technologies have been developed to discourage cheating. Students at the University of Pennsylvania were so exasperated with blue books that they developed a secure desktop application, Emerald Exam, that will automatically submit the exam if a student begins using other programs when taking the test (Smolo). Cheating has been addressed by information technology specialists, and slowly, universities nationwide are beginning to give essay exams in the form of word processing programs monitored in a secure environment.

Eliminating hand written tests is understandable in the text it, tweet it, and type it world of the twenty-first century. Professors and students agree that handwritten tests should go. "Even though I don't want to be biased, I can't help but share my love of reading a nice, neat exam," said USC law professor Eric Talley" (Weiss). Most of the 11 professors we interviewed agreed that blue books would eventually be replaced by computers. Not only does new technology cater to student needs, but the ability to

type, copy, paste, and rearrange typed information in the blink of an eye sustains the idea that writing is a process. In the words of Weiss: “To be sure, computerized testing has long been forecast as the wave of the future.”

Further Research

The blue book is an institution in American higher education; yet it has been studied rarely. We believe that there may be geographical implications in the use of the blue book, particularly in East Coast or Ivy League institutions. In “Why Are Blue Books Blue?” Yale reporter Marberg gives examples of Exeter, Smith, and Bowdoin as users that drive the production of millions of blue books annually by such companies of Pontiac, which, yes, also claims to be the “Home of the Blue Books.” An analysis of production and sales figures over several years or even decades for the examination booklets by such companies as Roaring Spring, Pontiac, and others would be illuminating, but unlikely. The generation in the pipeline for college may not have learned cursive, although as with the modes of discourse and the blue book itself, cursive writing instruction has experienced a rise and fall (Helm). What is the ratio of cursive to print currently on essay exams? Will that

change as more students who have not been taught cursive enter college?

Conclusions

In 1981, Robert Connors’ “The Rise and Fall of the Modes of Discourse” traced the decline of the modes of discourse as an instructional strategy. In truth, that approach persists in some places, perhaps the result of conservatism, tradition, or inertia. Certainly, it seems that with improved technology, blue books may recede from view. While we predict the fall of the blue book, its use may be declining but never entirely disappear. It is a cultural artifact imbued with meaning and trepidation for literally millions of essay examination takers. It reveals how our society thinks and expresses itself. As with Connors’ modes, traditions die hard. The blue book may be so solidly entrenched in the rites of passage associated with college that it withstands technological innovations, at least in some places where its meaning and value carry significant weight. Just as Professor Sophocles of Harvard burned those initial examination booklets that replaced recitations with written essays, others will defend the blue book to the end and despise any replacements.

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