Guidelines for Primary Source Literacy

Developed by the ACRL RBMS-SAA Joint Task Force on the Development of
Guidelines for Primary Source Literacy

Draft for Feedback - 1/13/17

Table of Contents

Introduction

Primary sources provide compelling, direct evidence of human activity, and can be challenging to those who use them. Their creators' intents and biases, their sometimes unique and unfamiliar formats, and the contexts in which they have been preserved and made accessible, all require critical analysis and thought. Users who encounter primary sources gain a unique window into the subject they are studying, and an opportunity to learn firsthand how primary sources are used to create original research. As they learn to successfully use primary sources, they also gain important skills that help them navigate the use of other information sources, and further develop their critical thinking skills. These guidelines seek to articulate the range of knowledge, skills, and abilities required to effectively use primary sources. While the primary audience for this document is those working with college and university students, the guidelines have been written to be sufficiently flexible for use in K-12 and general public settings as well.

Primary sources are materials in a variety of formats, created at the time under study, that serve as original evidence documenting a time period, an event, a work, people, or ideas. Primary source literacy is the combination of knowledge, skills, and abilities necessary to effectively find, interpret, evaluate, and ethically use primary sources within disciplinary contexts, in order to create new knowledge.

This definition of primary source literacy, and the vision for this document, are deliberately broad. Defining the terms primary source literacy, primary source, or even source, is inherently problematic. The concept of what makes a source "primary" varies based on the discipline, depends on the interplay with secondary sources, and relies on the particular research question and the different interpretive processes researchers bring to their projects. Research questions can develop out of encounters with primary sources, or primary sources can be used to refine or answer questions already developed. Success in using these sources also depends on the goals of the learner; thus, primary source literacy is not a binary state, but rather a spectrum. Furthermore, instructors who are teaching these skills may be simultaneously concerned with conveying the excitement of research with primary sources, or giving students a memorable or transformative experience while using such sources. Although important goals, these are abstract qualities that resist assessment and are not explicitly covered as part of these guidelines.

Primary source literacy intersects with other "literacies," including information literacy, visual literacy, and digital literacy, and concepts like collective memory, cultural heritage, and individual/cultural perspectives. Thus, users of primary sources , and those who seek to guide them in the process, do not have a straightforward process in front of them.

To make some order of this complex landscape, these guidelines identify core ideas that undergird successful work with primary sources, as well as more specific learning objectives to guide those who teach the use of primary sources. The following core ideas and learning objectives relate to primary sources in a variety of formats, including original artifacts, both physical and born-digital, and copies, whether digitized or in printed or analog format.[1] While some ideas may be more applicable for some formats, the document as a whole is designed with all formats in mind.

The guidelines may be used as a whole or in part depending on particular learning needs and larger programmatic goals, and may be applied differently in different scholarly contexts. The core ideas may be used to facilitate discussions between librarians/archivists and faculty/teachers about what students can learn through incorporating primary sources into course curricula. Instructors, including archivists and librarians, may draw upon the learning objectives to develop significant learning experiences and assessment measures appropriate to their specific pedagogical aims. In addition to serving as a catalyst for communication among librarians/archivists and faculty/teachers, these guidelines may also enhance general programming and skill building around primary sources regardless of the target audience. Students and researchers may also consult these guidelines to aid in their self-development in the use of primary sources.

There are several appendices to facilitate the use of these guidelines. Appendix 1 is a Glossary which defines terms used in this document, particularly their use in the context of primary source literacy. Appendix 2 is still in development and will offer practical tools to assist instructors in developing their own instructional tools, based on the guidelines.   The Bibliography in Appendix 3 offers suggestions for further exploration of these concepts. A list of other relevant guidelines provides further resources. Appendix 4 outlines more completely the background and development of this document.

---

[1] These guidelines are not intended to be about using archives and special collections, although skills and objectives in the document are relevant to using special collections and archives. Nor are they guidelines for archival literacy.

Core Ideas

<u>Practical Concepts</u>

Practical concepts central to work with primary sources include ideas related to the following:

- Locating, accessing, gathering, and handling primary sources in special collections and archives; museums and historical societies; private hands; reprints, edited volumes, readers, anthologies, and textbooks; facsimiles; and the open web.

- Awareness of repository procedures, how to communicate with special collections professionals, and terminology related to primary source research.

- Awareness of different formats and a basic knowledge of how archival, rare book, and digital primary source collections are organized, described, preserved, and digitized.

- How ideas, sources, and evidence are documented in primary sources.

There are also practical considerations related to the capture and management of primary source research data that can present challenges not faced with other kinds of sources, whether in the form of note taking, transcription, photography, or digital downloads.

<u>Analytical Concepts</u>

Analytical engagement is crucial when working with primary sources. Users activate primary sources through hypothesis, analysis, synthesis, interpretation, critical thinking, and evaluation. Primary source analysis also supports the development of questions and arguments, and engages with questions of materiality, historical context, and narrative. In the analytical act of engaging and activating primary sources in a project, the user explores technological issues relating to how the sources were produced and delivered. The user also recognizes that interpretive mediation relating to a source occurs on a continuum from its creation to its utilization in the production of a creative project, whether written, captured on a visual medium, or performed. Finally, a self-reflective user considers primary sources in

the context of her own project and in her agency in creating new potential primary sources on a daily basis.

<u>Ethical Concepts</u>

Ethical concepts, which involve issues of legality, privacy, cultural understanding, donor rights, copyright, and intellectual property rights, are important concepts when working with primary sources. Users should consider how the primary sources used in their scholarship can potentially affect the creators, donors, owners, and readers of these primary sources, and weigh these factors responsibly. Interpretation of these concerns may vary in different situations, and users should remain aware of potential ethical considerations and consequences.

<u>Theoretical Concepts</u>

The user should also be aware of the theoretical ideas, concepts, and dispositions underpinning the collection, arrangement, and presentation of rare and archival material that can affect the ultimate analysis of primary sources. These include issues of evidence, authority, power, authenticity, context, the iterative nature of research, the relationship between primary and secondary sources, physicality, historical empathy, agency, value, absences, and privilege. Archives are always already mediated in some way, while digitized collections reflect selection, digitization, and presentation decisions that may not be self-evident. It is important for users of primary sources to be aware of these interventions.

Learning Objectives

These learning objectives articulate broadly the knowledge, skills, and abilities needed by researchers to successfully conceptualize, find, analyze, and use primary sources. They do not specify measurable outcomes or benchmarks for instruction, but can be of assistance in articulating specific learning goals that can be assessed. Several specific examples are considered in Appendix 2.

These objectives are intended to be illustrative and are neither comprehensive nor prescriptive. Working with users on developing primary source research skills can encompass some or all of these in combinations, depending on the realities of the instructional opportunity (e.g., semester-long course or one-time workshop session, session focused on pedagogical goals of a faculty member or librarian/archivist-developed workshop, medieval manuscripts engagement or working with 20th-century archives). Developing primary source literacy is an ongoing activity that deepens as users gain experience interacting with these types of sources.

A person knowledgeable in the use of primary sources can:

I. Conceptualize

  A. Distinguish primary from secondary sources for the research question(s) being investigated. Demonstrate an understanding of the interrelatedness of primary and secondary sources for research.
  B. Articulate what might serve as primary sources for a specific research project within the framework of an academic discipline or area of study.
  C. Use primary sources to generate and refine research questions.
  D. Understand that research is an iterative process and that as primary sources are found and analysed the research question(s) may change.

II. Find

  A. Identify and locate physical or digital repositories, databases, or other online resources where relevant primary sources might be found.
  B. Use appropriate, efficient, and effective search strategies in order to locate primary sources. Be familiar with the most common ways primary sources are described, such as catalog records and archival finding aids.

C. Distinguish between catalogs, databases, and other online resources that contain information *about* sources, versus those that contain digital versions or copies of the sources themselves.

D. Understand that collections of primary source materials are often shaped by the selectivity and mediation of individuals (such as collection creators, archivists and librarians, donors, and publishers) resulting in biases that limit the sources available.

III. Interpret, Analyse, and Evaluate

A. Examine and interpret a primary source, which may require the ability to read a particular script, font, or language, to understand or operate a particular technology, or to comprehend vocabulary, syntax, and communication norms of the time period and location where the source was created.

B. Critically interrogate the creator(s) of a primary source, including tone, subjectivity, and biases, and consider how these relate to the original purpose(s) and audience(s) of the source.

C. Identify and analyze contexts of a primary source through subject knowledge about the time and culture in which it was created; related materials in a collection; knowledge of the author or creator; or knowledge regarding its format, genre, or publication history.

D. Identify, interrogate, and consider the reasons for silences, gaps, contradictions, and power relationships in the documentary record, and their impact on the research process.

E. Factor physical and material elements into the interpretation of primary sources including the relationship between container (binding, media, or overall physical attributes) and informational content, and the relationship of original sources to physical or digital copies of those sources.

F. Demonstrate historical empathy, curiosity about the past, and appreciation for historical sources and people.

IV. Use and Incorporate

A. Identify and communicate information found in primary sources, including summarizing the content of the source and identifying and reporting key components such as who created it, when, and what it is.

B. Analyze strengths and weaknesses of particular primary sources in meeting the goals of the research or creative project.

C. Understand the need to examine and synthesize a variety of sources in order to construct, support, or dispute a research argument.

D. Use primary sources in a manner that respects the privacy rights and cultural sensitivities of the individuals reflected therein.

E. Cite sources in accordance with appropriate citation style guidelines and in consideration of repository preferences.

F. Adhere to copyright and privacy laws when utilizing primary source information in the output of a research or creative project.

Appendices

Appendix 1: Glossary

The following glossary is designed to clarify the meaning of terms and concepts as used throughout the ACRL/RBMS - SAA Guidelines for Primary Source Literacy. Some definitions are adapted from, Pearce-Moses, Richard, *A Glossary of Archival and Records Terminology.* Society of American Archivists, 2005. http://www2.archivists.org/glossary.

Access
The means of examining, retrieving, or obtaining primary sources for use. While users are able to access some primary sources on the open web, others are challenged by the limitations of the telecommunications infrastructure. Access to original primary sources can be reduced to some degree by concerns of preservation, security, privacy, legal constraints, or geographic location. Understanding the tools and practices used to describe and make these sources accessible is important to becoming an effective user of primary sources. See: *catalog record, database, finding aid.*

Agency
Possessing the ability to act. Agency is deeply enmeshed in power relationships; many people or groups are deprived of the agency to create or preserve records. The agency and actions of librarians and archivists underpin their work in collecting, arranging, and describing materials in their repositories. Users should also be aware of their own agency to access and use primary sources, and the possible limitations surrounding that agency.

Archives: See Special Collections / Archives

Archival Silences
Gaps or missing pieces in the historical record, often caused by those who were unable to write their own records, or whose records were not considered valuable or were suppressed by the dominant culture.[2] Should be distinguished from merely lack of holdings in a particular repository.

Archivist / Librarian
An information professional responsible for collecting/acquiring, organizing, describing, managing, and providing access to research materials, including collections of primary and/or

---

[2] See also Carter, Rodney G.S. "Of Things Said and Unsaid: Power, Archival Silences, and Power in Silences." *Archivaria* 61 (2006) 215-233 who calls these silences "the manifestation of the actions of the powerful."

secondary sources. This person usually works in the context of a library, archive, or other cultural heritage institution.

Authority

As relates to primary sources, authority may refer to the relative credibility and expertise of the creator(s) of a source, or it may refer to the authority to preserve, collect, access, and use/reuse. The ACRL Framework for Information Literacy has a helpful discussion of authority, and how novices vs. experts approach this concept.[3]

Authenticity

Authenticity is closely associated with the creator (or creators) of a source. The authenticity of records and documents is usually presumed, but if questioned it can sometimes be verified by testing physical and stylistic characteristics of a record. Authenticity alone does not automatically imply that the content of a record is reliable.

See also: *Evidence, Materiality*

Bias

A prejudice in favor of one thing or person over another. Sources may include the biases of their creator(s). Since bias may be implicit rather than obvious, a source may reflect unconscious or unintentional bias.

Catalog Record

Descriptions of materials, whether books or manuscript collections, in a specific common format. Such records generally contain information including author, title, publication information, and topics covered in the resource. These records are often searched using a database, usually a library catalog.

See also: *Finding Aid*

Citation

A reference to a *source*. When citing a primary source, the citation helps point readers to the document or item. Citations may also further describe a source, help establish *evidence* for an argument, or give credit for an idea. Citation style refers to the format of citation and rules for its construction (examples: MLA, APA, Chicago). Different disciplines may prefer one style over another. Archives and special collections may indicate a preferred citation formula or credit line for their collections.

Collection

---

[3] See "Authority is Constructed and Contextual" *Framework for information Literacy for Higher Education,* 2016. http://www.ala.org/acrl/standards/ilframework#authority.

A group of materials with some unifying characteristic, often related either to the topic, the creator, or the assembler. Collections can be assembled by a person, organization, or repository. Collections can be referred to as "papers" or "records" in the context of a *Repository.*

Container

A package or housing used to hold materials, such as a record carton or archival box; figuratively, the form in which content appears, such as a book, notebook, three-ring binder, email thread, etc.

Content

The intellectual substance of a source, including text, data, symbols, numerals, images, or sound.

Contextualization / Context

Things (text, papers, etc.) which surround a document or passage and help clarify its meaning. For a primary source, this might be other sources in a collection or by the same creator, or information about the event documented from secondary sources.

Copy / Surrogate

Something that is nearly identical to something else; a facsimile; a reproduction; a duplicate made from an original.

The more specific term surrogate may be used to indicate a copy that is created to serve as a substitute for an original source, often with the intention of preserving the original by protecting it from overuse. When speaking of primary sources, a surrogate is often a digital version of a physical source that is housed in a specific collection or repository.

Copyright

A legal right granting exclusive rights for use, reproduction, publication, adaptation, performance, and/or distribution of an original work (whether published or unpublished), typically for a limited period of time. Copyright law is intended to balance the economic and creative interests of the rights holder with the desire of a public to use, adapt, or build upon previous work. Copyright law varies by country. See also *Fair Use* and *Permissions***.**

Creator

The individual, family, group, or organization that is responsible for a source's production, accumulation, or formation.

Creators of primary sources include artists, authors, and manufacturers. An individual who accumulates and compiles a collection of primary sources may also be seen as the creator (of the collection), even when they did not create the sources themselves.

Cultural understanding

The ability to understand the viewpoint of those from other cultures, whether in the present or past, and to understand shared or conflicted history.

Understanding the importance of studying and preserving the records of many and created from many points of view.

Database
A structured way to store and retrieve data. In the research and information environment, it often refers to a digital collection of citations, articles, books, and/or finding aids which can be searched for information on a variety of topics. Some research databases can be very general, while others are specific to a subject (United States history), time period (Early English Books Online), or format (newspapers). Databases can be produced by vendors or publishers, which usually require a paid subscription fee, while other databases are developed by and provide access to collections held by consortia or groups of institutions. Databases may provide access to citations, to finding aids, or to digital or digitized articles and primary sources.

Discipline
A subject, field of study, or area of expertise. In the college/university environment, this could align with an academic department or program of study. In a K-12 environment, this could refer to the subject being taught.

Disciplines often have specific views on the types of sources that should be used in research and what constitutes a primary source. While many research topics are interdisciplinary, students learning how to appropriately incorporate primary sources into their projects will often do so within the domains of disciplinary areas.

Evidence
Primary sources serve as support toward answering a research question, proving or disproving a fact, or developing an argument. The strength of supporting evidence and the approach by which it is gathered and applied to a claim impact the credibility of the claim, and relate to *authority.*[4]

Faculty
see Instructor

Fair Use
Permissible use of copyrighted material. In the United States, use that is not considered infringement generally includes criticism, news reporting, teaching, scholarship, and parody.

---

[4] For a nice discussion of teaching the use of evidence in historical research, including how, "The intellectual ability to collect, process, analyse, and cross-reference evidence is crucial to an informed citizenry," see:
Stéphane Lévesque, "How Do We Make Sense of the Raw Materials of the Past? - Evidence," chap. 6 in *Thinking Historically: Educating Students for the Twenty-First Century* (Toronto: University of Toronto Press, 2008).

For more information, see http://fairuse.stanford.edu/overview/fair-use/what-is-fair-use/ and http://www.copyright.gov/fair-use/more-info.html

Finding Aid
A description of papers, records, or a manuscript collection that provides information about the materials, including arrangement and organization, historical or biographical background, a summary of the contents of a collection, and location of materials. These descriptions are used to locate relevant items within the collection. A finding aid is written through the process of arrangement and description, in which an archivist organizes materials and details their content.

See also: *Catalog Record*

Format
The container or method of presentation of a source. Descriptions of source formats might include those which identify the type of source (letter, diary, or photograph) or those which identify its state (physical or digital; handwritten or reprinted).

Historical empathy
The ability to appreciate the beliefs, values, and intentions of historical actors; to understand the differences inherent between the lives of current readers and past users; to show emotional engagement with a source; and to see and appreciate source(s) within their particular historical context.[5]

Instructor
These guidelines recognize that an "instructor" may refer to a faculty member or a teacher responsible for their own classroom, as well as to a librarian, archivist, or other professional who either collaborates with or works independently of a classroom teacher or faculty member.

Iterative process
All research is a repetitive cycle, requiring frequent returns to and revisions of earlier questions and assumptions, thus leading to new readings of texts and sources and new lines of inquiry.

Librarian / Archivist
see Archivist / Librarian

Literacy
Competency, knowledge, or skills in a specified area. Literacy is not a binary state, but rather a spectrum of competence within the area. Primary source literacy, information literacy, digital literacy, and visual literacy are all relevant to working with primary sources.

Materiality

---

[5] See also Yilmaz, Kaya. "Historical Empathy and Its Implications for Classroom Practices in Schools." *The History Teacher* 40.3 (2007): 331-37.

The physical nature or format of a source. This is often distinguished from the content or the text of the source, although the best readings interrogate and elucidate both text and format. Often associated with material culture, the study of objects (rather than paper- or text-based sources) to learn about the past.

Mediation

The amount of intervention and contextualization between the user and the source. There are many kinds of mediation, whether through added content, translation, or the distance of a copy from the original source. For example, a primary document published in a compilation which includes an introduction about the writer and the event about which they were writing is more mediated than a publication which does not have an introduction. Librarians and archivists also provide mediation for documents through finding aids and catalog records, as well as their organization and arrangement of materials.

Permissions

If a particular use of a copyrighted work is not covered by *fair use*, a researcher may require authorization from the rights holders in order to use the work in certain ways.

Preservation

The act of keeping objects from harm, injury, decay, or destruction. In the life cycle of primary sources, creators themselves may or may not undertake the first steps toward preserving sources. The term also refers to specific professional practices[6] undertaken by repositories to stabilize and extend the life of materials in their care, ensuring they are as durable and long-lasting as possible. These include selection, stabilization, appropriate storage environment and handling, security, and conservation treatments. Preservation may also involve the creation of surrogates to serve as use copies, and the reformatting from decaying or out-dated formats into those that are retrievable, readable, and usable over time. Users of primary sources contribute to preservation through proper handling and use. The concept of preservation is closely tied to the concept of *access.*

Primary source

Primary sources are materials in a variety of formats, created at the time under study, that serve as original evidence documenting a time period, event, people, idea, or work. Primary sources can be printed materials (such as books and ephemera), manuscript/archival materials (such as diaries or ledgers), audio/visual materials (such as recordings or films), or artifacts (such as clothes or personal belongings). Primary sources can be found in both analog and digital forms.

Privacy

Librarians, archivists, and researchers need to be aware of various legal and ethical frameworks regarding privacy.

---

[6] See the Preservation and Reformatting Section of the American Library Association for more information, http://www.ala.org/alcts/mgrps/pars.

Archivists and librarians in the United States may manage collections covered by privacy laws such as the Health Insurance Portability and Accountability Act (HIPAA) or the Family Educational Rights and Privacy Act (FERPA). Professionals may restrict or redact records because of applicable laws, institutional risk management decisions, donor agreements, or professional ethics.

Professionals and researchers alike should consider these frameworks when citing, using, or promoting collections.

Public Domain
Works that are in the public domain do not have copyright restrictions. This could be because copyright or other intellectual property rights expired or were forfeited, because the work was created before such laws existed, because the work is not covered by copyright (as is the case with recipes or some government documents), or because the creator released the work under a public domain-like license allowing certain uses. Privacy and other ethical considerations should still be weighed when using materials in the public domain.

Repository
Umbrella term referring to a cultural heritage organization that collects, preserves, and makes collections accessible, generally for research. Could refer to museums, libraries, archives, historical societies, research centers, or other types of institutions. A repository may be independent or part of a larger organization.

For those seeking to use primary sources effectively, having knowledge of the types of repositories and their various reasons and methods for collecting, preserving, and providing access, including the limits to each, is important for successfully identifying and using those collections. The term repository should be thought of paired with the concepts of *silences, authority, agency,* and *mediation.* See also: *Special Collections / Archives*

Research Project
Research projects may be scholarly, creative, or professional in nature. End products or deliverables can include written essays, papers, or articles; datasets or databases; performances; exhibitions; websites; artwork, etc.

Research Question
An idea or inquiry which drives a *research project*. A good research question is answerable, arguable, and is not too broad or too narrow.

A research question is more specific to a particular issue or concern than a *research topic*. For example, within the topic of the World War II homefront, a research question might be how the use of victory gardens affected the food supply in certain areas of the United States.

The research question determines what information is needed, and may help the researcher define which sources are considered "primary" for a given project.

Secondary source

A work synthesizing and/or commenting on primary and/or other secondary sources. Secondary sources, which are often works of scholarship, are differentiated from primary sources by the element of critical synthesis, analysis, or commentary.

Silences, see *Archival silences*

Source

A place where information is found, such as a document, book, or encyclopedia. Sources can be primary, secondary, or tertiary. See *Evidence.*

Special Collections / Archives

These terms each have multiple meanings, and are often used interchangeably. "Archive" is also a variation, used in a general way to describe things that are being intentionally kept.

1. A general term for a department, unit, library, or other physical place which stores and provides secure access to rare and unique materials, including archives, manuscripts, rare books, or other original materials. A special collections department is an example of a type of *repository*.
2. The materials or collections within a department, unit, or library containing rare and unique materials.

Surrogate: See *Copy*

Teacher

see Instructor

Appendix 2: Examples/Useful Resources - Pedagogy (in progress)

The Task Force is looking to include practical examples to assist instructors new to teaching with primary sources. We welcome feedback on what form or content would be most useful.

We also aim to include references to key tools and resources for broader developing broader pedagogical skills, such as writing learning outcomes and assessments, as well as cross-linking to the ACRL Framework for Information Literacy and other relevant online resources.

Appendix 3: Annotated Bibliography

The purpose of this annotated bibliography is to identify key resources for learning more about primary source literacy. It is deliberately selective. This bibliography focuses on peer-reviewed sources published between 2014 and 2017 when the work of the SAA/RBMS Primary Source Literacy Task Force concluded. Because Internet resources are dynamic--changing in form, content, and access--they were not added to this resource, which is a static document.

A more comprehensive bibliography, maintained but not regularly updated by the Reference, Access, and Outreach Section of the Society of American Archivists, is available at http://www2.archivists.org/groups/reference-access-and-outreach-section/teaching-with-primary-sources-bibliography.

Bahde, Anne, Heather Smedberg, and Mattie Taormina, eds. *Using Primary Sources: Hands-On Instructional Exercises: Hands-On Instructional Exercises*. ABC-CLIO, 2014.
> *Using Primary Sources* contains ideas for active learning exercises with primary sources held in special collections, archives, and museums. The book begins with a discussion of active learning and object-based learning, and a discussion of the role of these pedagogies in teaching with primary sources and primary source literacy. The bulk of the text consists of short descriptions of these instructional exercises, including introductory sessions on primary source analysis and the process of researching with primary sources, as well as advanced sessions on building analytical skills, contextualizing and synthesizing sources, interpreting finding aids, and interrogating a source's physical container.

Carini, Peter. "Information Literacy for Archives and Special Collections: Defining Outcomes." *portal: Libraries and the Academy* 16, no. 1 (2016): 191-206.
> This article provides context for the background and value of information literacy as it pertains to primary sources. Carini explains the need for a set of standards and outcomes specifically addressing primary source literacy. The article provides a proposed framework of primary source learning outcomes which are situated within the following areas: know, interpret, evaluate, use, access, and follow ethical principles. Carini closes the article with a section on possible applications of the proposed outcomes. This article provides example learning outcomes and explains the necessity of addressing the void of primary source literacy standards.

Hensley, Merinda Kaye, Benjamin P. Murphy, and Ellen D. Swain. "Analyzing Archival Intelligence: A Collaboration between Library Instruction and Archives." *Communications in Information Literacy* 8, no. 1 (2014): 96-114.
> The University of Illinois at Urbana-Champaign's Student Life and Culture (SLC) Archival Program draws approximately 200 students per semester from the undergraduate rhetoric general education curriculum for instruction sessions. A 2012 study surveyed and interviewed student researchers who used the SLC Archives to measure student learning in these sessions. Surveys revealed that students struggled to understand the specialized language surrounding archives and navigate the complexity of the archival research process. Interviews revealed that students were confused about the difference between libraries and archives, the concept of provenance,

and the relationship between finding aids and the collections they represent. This article provides some background on the obstacles students face when learning to navigate archival research and offers ideas on how to address those obstacles in instruction.

Horowitz, Sarah M. "Hands-On Learning in Special Collections: A Pilot Assessment Project." *Journal of Archival Organization* (2016).
> This article acknowledges the increased demand that special collections departments face with regard to providing meaningful assessment and standards for evaluating outcomes in classes that provide hands-on learning experiences with primary sources. The author describes a specific assessment project at Augustana College that used rubrics to attempt to gauge the impact of hands-on primary source engagement upon student information literacy and critical thinking skills. Although the results were inconclusive, this article addresses the need for better assessment tools and serves as a trailblazer in creating rubrics for primary source literacy that tie directly to pre-existing assessment tools provided by ACRL.

Mitchell, Eleanor, Peggy Seiden, and Suzy Taraba. *Past or portal?: Enhancing undergraduate learning through special collections and archives*. Association of College & Research Libraries, 2012.
> This volume provides a wealth of examples of effective instructional activities involving undergraduate students working with primary sources at nearly fifty different U.S. based institutions. It highlights a wide variety of instructional models that provide important guides for teaching with primary sources.

Morris, Sammie, Lawrence Mykytiuk, and Sharon Weiner. "Archival Literacy for History Students: Identifying Faculty Expectations of Archival Research Skills." *The American Archivist* 77, no. 2 (2014): 394-424.
> Morris, Mykytiuk, and Weiner studied core competencies for using primary sources and archives, specifically for history students. Through a review of the literature and course syllabi as well as interviewing faculty, the authors developed a list of competencies for undergraduate history majors. This article concludes with a suite of recommendations to advance archival literacy within institutional contexts as well as within the archives profession.

Mulroney, Lucy and Patrick Williams, "Doing It Yourself: Special Collections as a Springboard for Personal, Critical Approaches to Information." In T. Swanson and H. Jagman (Eds.) *Not Just Where to Click: Teaching Students How to Think about Information* (Publications in Librarianship #68), ACRL Press, 2015.
> This chapter describes a collaborative effort between a special collections curator, a subject specialist librarian, and a writing instructor to plan a series of sessions for an undergraduate writing class studying DIY publishing. The project required students to use a primary source from Syracuse University's special collections as inspiration to construct a zine on the topic of their choice, which they presented and distributed during a public "Zine Fest." The authors discuss the ways in which primary source research impacted students' information literacy skills in a variety of areas, including critically evaluating sources, participating in the scholarly conversation, and taking ownership of their original research in a particular subject area.

Prom, Christopher J. and Lisa Janicke Hinchcliffe. *Teaching with Primary Sources*. Chicago, IL: Society of American Archivists, 2016.
> *Teaching with Primary Sources* describes the development of primary source literacy, but also offers practical, hands-on ideas to integrate primary source literacy into curricula. Module one

contextualizes archival literacy by describing its development both in the archival profession as well as broader educational frameworks. The second module offers a guide not only for archivists, but also librarians and educators about the practices of teaching. From explaining various roles archivists play as educators to offering lesson plan templates, this module offers readers many practical ideas. The third and final module summarizes numerous case studies of connecting students with primary sources. Secondary educators, faculty in higher education, and archivists were all interviewed to gather strategies and successful projects to showcase. The volume also contains multiple bibliographies of suggested reading lists and appendices with additional resources.

Samuelson, Todd, and Cait Coker. "Mind the gap: Integrating special collections teaching." *portal: Libraries and the Academy* 14, no. 1 (2014): 51-66.
> This article provides advice to archivists interested in building stronger relationships with fellow librarians and teaching faculty. The authors use a case study examining these relationships at their own institution to point out that the most effective way to reach teaching faculty and librarians is to demonstrate how materials in special collections libraries can be used to meet curricular needs.

Swain, Ellen D. "Best Practices for Teaching with Primary Sources," in Patrick Ragains and M. Sandra Wood. *The new information literacy instruction: best practices*. Rowman & Littlefield, 2015.
> This book chapter presents a case study describing the relationship between the Student Life and Culture archives and the Rhetoric program at the University of Illinois at Urbana-Champaign. Instruction related to archives is in the process of shifting from a broad, introductory overview approach to a more in-depth, targeted approach. Archivists interested in shifting their approach to instruction will find useful guidance and advice in this case study.

Theimer, Kate, ed. *Educational Programs: Innovative Practices for Archives and Special Collections*. Rowman & Littlefield, 2015.
> This book is a collection of case studies about how to develop educational programming that centers upon the use of primary sources. Theimer's stated purpose is to demonstrate the many ways in which special collections and archives can be integrated into curricula at the K-12, undergraduate, and graduate levels of education. She also indicates that many of the ideas presented in the book are transferrable to a variety of institutions and are appropriate for either long-term programmatic development or immediate implementation on a relatively small scale. This resource is an effective way for someone to orient themselves initially to the concept of hands-on learning with primary sources, chiefly by selecting the particular demographic they wish to target or type of program they wish to develop and then reading the relevant individual chapters on those topics.

Weiner, Sharon A., Sammie Morris, and Lawrence J. Mykytiuk. "Archival Literacy Competencies for Undergraduate History Majors." *The American Archivist* 78, no. 1 (2015): 154-180.
> This article is the second in a series of articles documenting efforts to establish archival literacy competencies for undergraduate history majors based on input from faculty, archivists, and librarians. After a list of competencies was drafted, comments were accepted on how to improve the list. The resulting list includes both basic and advanced skills recommended for undergraduate history majors across a variety of skillsets, including identifying and locating sources, incorporating sources into research, obtaining guidance from archivists, demonstrating

acculturation to archives, and ethically using information obtained from sources. These skills could be adapted or expanded to be used in a variety of instructional settings.

Appendix 4: Background on the Development of These Guidelines (in progress)

The Joint Task Force on Developing Guidelines for Primary Source Literacy (JTF-PSL) was charged by the Association of College and Research Libraries' Rare Books and Manuscripts Section (ACRL/RBMS) and the Society of American Archivists (SAA) in 2015 to develop guidelines that provide competency standards for primary source literacy. The term established for the JTF-PSL to complete its work is September 2015-September 2017.

Additional information on the work of the JTF-PSL thus far can be found on websites maintained by its members for both of its sponsoring organizations:
- http://www.ala.org/acrl/rbms/acr-rbmtfpsl
- http://www2.archivists.org/groups/saa-acrlrbms-joint-task-force-on-primary-source-literacy

This appendix will be developed further for inclusion in the final version of these guidelines.

Members of the JTF-PSL:
ACRL/RBMS-appointed members
- Anne Bahde (Oregon State University)
- Julie Grob (University of Houston)
- Sarah Horowitz (Haverford College)
- Leah Richardson (George Washington University)
- Heather Smedberg, co-chair (University of California, San Diego)
- Morgan Swan (Dartmouth College)
SAA-appointed members
- Samantha Crisp (Augustana College)
- Gordon Daines (Brigham Young University)
- Robin Katz (University of California, Riverside)
- Bill Landis, co-chair (Yale University)
- Sammie Morris (Purdue University)
- Lisa Sjoberg (Concordia College)