Teaching with Primary Sources Working Group
Survey Findings and Recommendations
August 2, 2013

Objectives
This report presents findings and analysis from a survey of archivists regarding practices for teaching with primary sources. The goals of the survey were to:

- Document/take a "snapshot" of current instruction practices within archives
- Determine if there is consensus on any successful trends, tools, or techniques
- Uncover helpful instructional resources that could be disseminated to the archival community
- Identify needs for instructional resources or materials, or areas of improvement as a profession

Team
The survey was charged by the Teaching with Primary Sources Working Group of the Society of American Archivists (SAA) Reference, Access, and Outreach Section. The survey team included the following SAA members:

- Sherri Berger, California Digital Library
- Lori Birrell, University of Rochester
- Matt Herbison, Drexel University
- Janet Olson, Northwestern University
- Elizabeth Wilkinson, Purdue University

Methodology
The survey was conducted online through the web service Survey Gizmo. It was open for approximately two weeks, January 14–25, 2013. The survey team advertised the survey among SAA membership by announcing its availability on the RAO listserv and the "In the Loop" e-newsletter. To incentivize participation, survey participants were entered for a chance to win one of five copies of an ARL publication related to connecting undergraduate students with special collections.

The survey consisted of 23 questions—some multiple-choice, some free-text, and some a mix of both. The questions fell into four major categories:

- Institutional demographics, including staff time and resources for instruction
- Formats, tools, and techniques for instruction
- Evaluation of and reflection on methods
- Resources for training and improving the success of instructional practices

The complete survey questions are included in Appendix B.

Responses
The survey received 61 responses.

Summary Findings

1. **Respondent demographics**

   - A clear majority of respondents identified as representing college or university archives.

   - They represented repositories of a wide range of sizes, in terms of both holdings and staff.

   - Respondents reported spending slightly more time on average on outreach, instruction, and reference activities than their repositories as a whole.

2. **Instruction resources and infrastructure**

   - 37% of respondents indicated that their repositories have a dedicated staff member for instruction.

   - 52% of respondents share instruction responsibilities among repository staff, and 13% share them with staff members outside of the repository (e.g. within the university library).

   - The frequency of instruction activities varied greatly across respondents, with a median number of 13.5 sessions planned and executed each year.

3. **Audiences and services**

   - Undergraduate students are a key target audience, with archives providing a variety of instructional services for them. Notably, five out of the eight non-academic repositories also focus on undergraduate instruction through onsite show-and-tell.

   - Of the options provided, genealogists were least frequently cited as receiving instruction.

   - Onsite show-and-tell is the most common instructional service provided, across all user groups.

   - Embedded instruction is common for undergraduate students, with almost half of respondents reporting that they provide this service for them.

   - Instruction is centered on the humanities, with 92% of respondents noting a focus on history research in particular. Other subjects include English (70%), social sciences (67%), arts (63%), sciences (25%). Respondents also mentioned several additional subjects (see Appendix A).

4. **Instructional themes and techniques**

   - In their freeform answers, respondents indicated a range of instructional themes, including:
     - Understanding and analyzing primary sources
     - Requesting and reviewing materials
     - Correct handling of materials
     - Familiarization with the physical space of the repository
     - Generally "understanding archives as a research environment"

   - Many respondents mentioned striving to promote active learning through "hands-on" activities.

   - Power Point presentations, document analysis/close reading, and tours of the stacks were among the most frequently cited tools and techniques.

- Over half of the respondents make instructional materials available online for a variety of users. Many make use of LibGuides. Others mentioned the use of digitized collections in instruction, as well as the use of social media, including blogs, Foursquare, and Facebook.

- Several respondents explicitly mentioned connecting instructional activities with class assignments and research papers.

- In some cases, repositories have actually taught researchers the work of the archives/archivist, for example involving them in scanning documents and creating online exhibits.

5. **Reflections on what works**

- Respondents described many successful approaches to instruction. Though diverse, these approaches largely fell into two major categories: those that are interactive in nature and those which involve close collaboration with faculty/instructors.

- Respondents describing successful interactive approaches cited methods and ideas for students/researchers such as:
    - Seeing materials in context
    - Touching materials
    - Analyzing documents through close reading
    - Engaging with documents, for example by thinking about relevance, research application
    - Creating blogs, posters
    - Comparing (e.g., past and present)
    - Writing about documents
    - Discussing materials in small groups and/or with guiding questions
    - Doing an assignment tied to research, for example in between a two-session series
    - Establishing specific goals and learning outcomes
    - Practicing searching for materials during "lab time"
    - Acting like a "real" researcher

- Respondents who emphasized working with faculty described gaining support and buy-in. Methods for doing so include:
    - "Training the teacher" to incorporate archival material into coursework
    - Creating, suggesting, or preparing assignments tied to research
    - Working with faculty to pre-select archival materials
    - Teaming up with faculty to create and conduct instructional session
    - Adding digitized documents to course management software

- Read as a whole, the survey responses suggest above all that successful instruction is achieved by tailoring instruction to the user group: presenting relevant topics in an age-appropriate context.

6. **Less successful approaches**

- Respondents also described approaches they have found unsuccessful in providing instruction:
    - Lecture-based presentations on what archives are, and how to do research
    - General introductions to materials without context and unrelated to a specific topic, course, or assignment
    - Instructional sessions prepared without faculty/instructor engagement

- Some respondents singled out PowerPoint presentations in particular as poor devices for information retention, one archivist noting that they "make undergraduates' eyes glaze over."

- Perhaps most notably, although 98% of respondents indicated that they do "show-and-tells," most of them indicated that this is not the most effective teaching method.

7. **Barriers to success**

- Respondents identified several barriers to success, including:
  - Lack of teacher engagement, and even resistance to incorporating archives instruction
  - Lack of time (to select, prepare, and present); staff; space; or technology
  - Lack of institutional or departmental support
  - Lack of connections with faculty, students, or other user groups
  - Lack of assessment

- Some of the above barriers are related. For example, without time, staff, and institutional support, archivists have limited ability to make connections, publicize holdings, and prepare presentations.

- Respondents suggested various methods for overcoming barriers, including:
  - Developing a core instruction format or module, based on frequently-asked topics
  - Creating a task force/advisory board
  - Crafting more relevant and specific instructional sessions
  - Building or rebuilding a network through activities such as:
    - Attending campus functions
    - Hosting open houses and events
    - Serving on committees
    - Targeting new faculty
    - Establishing individual relationships

  The survey team acknowledges, however, that these outreach activities still require time and support (not to mention patience and persistence), which, as noted above, may be elusive commodities at many institutions.

8. **Assessment**

- About half of respondents report undertaking some kind of assessment of instruction activities.

- Several respondents appear to represent institutions with established assessment programs that archives participate in or are required to use.

- Some repositories rely on student/faculty feedback, and a few assess their success according to the quality of students' archives-based projects. Others simply described "informal" assessment.

9. **Resources**

- Although one of the goals of the survey was to uncover resources to aid in instruction, respondents cited guides that seem too specific to particular repositories or classes to be broadly useful. Either more research is needed in this area, or resources of this type do not exist.

<u>Conclusions</u>

The survey findings suggest a number of areas in which the Reference, Access, and Outreach Section—and perhaps SAA as a whole—can support archivists in planning and implementing instructional services.

- **Developing and/or identifying techniques for creating interactive instruction experiences.** Concrete examples, case studies, and resources will help archivists create high-value instructional sessions without "reinventing the wheel." Resources supporting instruction should cover a range of topics in the whole spectrum of archival research, including navigating archives spaces and policies, identifying and finding materials, and analyzing primary sources.

- **Developing and/or identifying strategies for connecting with faculty/instructors** and engaging them in the instruction planning process. Although every relationship—and every institution—is unique, some approaches may cut across different contexts.

- **Advocating for instruction as a core component of archival work**, given that the underlying barrier to successful instruction is lack of time, resources, and/or institutional support. While SAA cannot "wave a magic wand" and create more archivists, it can help archivists promote and demonstrate the value of instructional services to both internal and external constituents.

- **Developing best practices for assessment.** A shared understanding of what makes instruction successful will help archivists improve their practices (and cut down on time needed to develop assessment methodologies). It will also help them make the case for more resources.

These areas of support might be approached through a combination of conference programming, committee work, and training opportunities.

Survey gaps

Although the survey achieved almost all of its stated objectives (see page 1), two questions still remain.

- Because the survey sample had overwhelming representation from academic archives, it is not clear whether the findings are broadly applicable to non-academic institutions. This might be resolved by asking archivists from other institutional settings to review this report and/or the raw data and comment on whether or not it resonates with their experiences.

- The survey did not uncover the kind of resources the group had hoped, namely, extensible guides and/or materials for helping archivists develop successful instructional sessions and programs. It is possible that these types of resources do not exist; or, the survey may not have been the right method for discovering them. More research should be done to determine whether they exist and, if not, whether it would be worth creating something like that for SAA members.

Appendix A: Subject Areas for Instruction

Respondents mentioned several subjects around which they have provided instruction. They are provided here for repositories that may want to consider expanding their offerings to new departments and research areas.

Anthropology
African American history
Appalachian studies
Area studies
Book arts
Biblical studies
Business
Communications
Computer Science
Curatorial Studies
Design
East Asian Studies
Education
Foreign Language
Gender Studies
International studies
Journalism
Liberal studies
Museum studies
Nursing and Allied Health
Performing arts
Philosophy
Public health
Religion
Rhetoric
Theology
Topics associated with campus student groups
Women's Studies

Appendix B: Survey Questions

1. What type of repository/institution do you represent?

☐ College or university
☐ Community or technical college
☐ Corporate archives
☐ Museum
☐ Public library/archives
☐ Historical society
☐ Other

[   ]

2. What is the approximate extent of your repository's holdings?

○ Less than 1,000 linear or cubic feet
○ Between 1,000 and 4,000 linear or cubic feet
○ Between 4,000 and 10,000 linear or cubic feet
○ Between 10,000 and 20,000 linear or cubic feet
○ More than 20,000 linear or cubic feet

3. How many staff are at your repository?

For FTE & PTE, count the number of active positions.

[   ]

For students and volunteers, count the typical number you have on an annual basis. (If it varies term to term, please try to average it out to a single value.)

	Number of people
FTE	
PTE	[ ]
Student Staff (Paid)	
Student Staff (Unpaid or For-Credit)	
Other Volunteers	

4. *For you individually* , what would you estimate is the percentage of your own time spent on the following activities in a recent typical year? (We know this list is over-simplified, but go with it!)

Outreach _____
Instruction _____
Reference _____
Processing _____
Administrative work _____
Other work _____

5. *For your repository* , what would you estimate is the percentage of staff time spent on the following activities in a recent typical year? (As with the previous question, we know this list is over-simplified, but go with it!)

Outreach _____
Instruction _____
Reference _____
Processing _____
Administrative work _____
Other work _____

6. What *instruction services* does your repository typically provide to the following user groups?

	Undergrads	Grad students	Faculty researchers	Independent scholars/professional researchers	Genealogists	K-12 students	Other users	We don't do this
On-site show & tells								
On-site lectures								
On-site workshops								
Off-site show & tells								
Off-site lectures								
Off-site workshops								
Embedded instruction (e.g. semester-long)								
Online instructional materials								

Please briefly elaborate on the ways in which you provide instruction with primary sources, especially in other ways not listed in the table above.

[ ]

If you checked any "other" boxes in the table above, please list these "other" user groups for which you provide instruction.

[ ]

7. Which of the following technologies and/or techniques are you making use of in instruction at your repository?

☐ PowerPoint presentation
☐ Prezi presentation
☐ Document analysis or "close reading"
☐ Tour of the stacks
☐ Technology-based presentation/demos (e.g., using online tools, databases, iPads, etc.)
☐ Research guides (including LibGuides)
☐ Online instructional videos/tutorials

Please briefly describe other technologies and/or techniques are you making use of in instruction at your repository.

[ ]

8. What approaches to teaching with primary sources have you found to be *most successful, and why?* Please provide examples.

[ ]

9. What approaches to teaching with primary sources have you found to be *less successful, and why?* Please provide examples.

[ ]

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10. What subjects or disciplines do you provide instruction for?

☐ History
☐ English
☐ Sciences
☐ Math
☐ Social Sciences
☐ Arts
☐ Other(s)?

[ ]

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11. Approximately how many *primary source-related* instructional sessions does your repository provide *in a typical year*?

[ ] sessions per year

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12. Is there a dedicated staff member for instruction at your repository?
You may check more than one if it makes sense in your situation.

☐ Yes
☐ No
☐ Responsibilities are shared among repository staff
☐ Responsibilities are shared among others (e.g., faculty, non-repository instruction librarians, etc.)

Comments?

[ ]

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13. How do you publicize, communicate, or otherwise indicate the availability of instructional services at your repository?

☐ Group email
☐ Newsletter
☐ Individual calls to specific users

☐ Individual emails to specific users
☐ Calendar of events on website
☐ Information or announcements on website
☐ Announcements through social media (Facebook, Twitter, etc.)
☐ Other (describe)

>

14. Do you have any go-to resources -- whether developed in-house or by someone else -- that inform or support your instructional projects or program? Or any resources that have affected your approach to instruction?

>

15. If your repository has developed any resources to support instruction, would you be amenable to sharing them?

⚪ No
⚪ Yes .please share some links or citation info for your resources here:

>

16. Are instructional sessions assessed at your repository? If so, how?

⚪ No
⚪ Yes - how:

>

17. What barriers do you face in connecting with users and in providing them instructional services?

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...and what strategies have you found to be effective in overcoming these barriers?

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