

# Literature Review Subgroup Report

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## Methodology

The goals of our literature review were to locate and compile definitions of primary source literacy as well as learning goals and outcomes associated with primary sources. To do so, we reviewed 35 articles, books, and presentations focused on primary sources and teaching. The majority of these works were published from 2012 to 2015. The amalgamation of our research is available in the appendices. Appendix A includes the definitions of primary source literacy that we found in the literature we reviewed. Appendix B lists the learning outcomes and goals that we discovered in our research.

## Summary of Findings

### Definitions of Primary Source Literacy

Most of the works we reviewed referenced Yakel and Torres' seminal article "AI: Archival Intelligence and User Experience" published in 2003. In this article, Yakel and Torres defined three areas that are essential for users to be successful with primary sources: domain knowledge, artifactual literacy, and archival intelligence. Many authors recognize the Yakel and Torres article as the foundation for defining primary source literacy and recognizing the need for learning outcomes specifically geared to primary sources.

Definitions of primary source literacy were wide ranging in the literature reviewed. Many of the works reviewed used the terms archival literacy or primary source literacy and traced the origins of these concepts to information literacy more generally. Information literate individuals are not only aware of an information need, but are also able to "locate, evaluate, and use effectively the needed information" (ACRL Standards). Daines and Nimer state "a full definition of primary source literacy will need to include both components of broader information literacy goals, as well as specific training for the unique materials found in cultural heritage repositories" (31).

Determining the relationship between information literacy standards and the standard to be formulated by the task force will have a direct impact on how the task force defines primary source literacy. The definition of primary source literacy established by the task force will be of critical importance in determining appropriate learning outcomes for primary source literacy. It is at the learning outcome level that the various communities interested in primary source literacy will cooperate.

## Learning Goals & Outcomes

The literature discusses features of primary source literacy that would address the specific training needed to work with these materials. For example, Bahde, Smedberg, and Taormina offer a list of primary source literacy characteristics including identifying a variety of source formats and types; searching for and locating primary sources; understanding the key features and operations of these tools; learning to generate relevant keywords; and developing observation and descriptive skills (xix-xx). This list is just a portion of the characteristics suggested by these authors. Other materials reviewed for this report discuss general characteristics appropriate for primary source literacy as well as offer learning goals and outcomes that are worth considering. This information is available in the appendices of this report.

These broad frameworks of definitions and characteristics are helpful in thinking about how to structure learning outcomes. If these are the features and overarching goals of primary source literacy then the learning goals should germinate from these characteristics. In a forthcoming article titled "Information Literacy for Archives and Special Collections," Peter Carini proposes a framework for standards based on the artifactual literacy and archival intelligence skills articulated in the 2003 Yakel and Torres "Archival Intelligence" article. Carini offers six broad standards: know, interpret, evaluate, use, access, and follow ethical principles. Within each of these six standards are 4 to 12 outcomes. This article is also beneficial in that Carini goes on to organize the outcomes into introductory, intermediate, and advanced levels. This model will be particularly helpful for the task force in thinking about appropriate learning outcomes and goals for primary source literacy. It is worth noting, however, that Carini's model has not been formally tested to determine its efficacy beyond his institution.

## Bibliography

While we reviewed many works for this report, not all of them contained applicable information. A full listing of the works consulted and reviewed is available in the literature review research team folder. The works that we found most helpful and recommend that the task force read are available below.

Bahde, Anne. "The History Labs: Integrating Primary Source Literacy Skills into a History Survey Course." *Journal of Archival Organization* vol. 11 (2013): 175–204.

Bahde, Anne, Heather Smedberg, and Mattie Taormina, eds. *Using Primary Sources: Hands-On Instructional Exercises*. Santa Barbara, California: Libraries Unlimited, 2014.  
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Carini, Peter. "Information Literacy for Archives and Special Collections: Defining Outcomes." *portal: Libraries and the Academy*, 16, no. 1 (2016): 193-208.

Daines, J. Gordon III and Cory L. Nimer. "In Search of Primary Source Literacy: Opportunities and Challenges." *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* vol. 16, no. 1 (June 20, 2015): 19-34.

Daines, Gordon, Beth Yakel, and Julie Grob. "Progressing Primary Source Literacy," [Slides as PDF.] 54th Annual RBMS Preconference, Minneapolis, MN, June 23, 2013.  
<[http://rbms.info/conferences2/preconfdocs/2013/seminar\\_f\\_all.pdf](http://rbms.info/conferences2/preconfdocs/2013/seminar_f_all.pdf)>

Hangen, Tona. "Historical Digital Literacy, One Classroom at a Time." *Journal of American History* vol. 101, no. 4 (2015): 1192-1203.

Morris, Sammie, Lawrence Mykytiuk, and Sharon Weiner. "Archival Literacy for History Students: Identifying Faculty Expectations of Archival Research Skills." *The American Archivist: Fall/Winter, Vol. 77, No. 2 (2014): 394-424.*

Mulroney, Lucy and Williams, P. "Doing It Yourself: Special Collections as a Springboard for Personal, Critical Approaches to Information." In Swanson, T. and H. Jagman (Eds.) Not Just Where to Click: Teaching Students How to Think about Information (Publications in Librarianship #68), ACRL Press (2015).

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.

Yakel, Elizabeth and Deborah A. Torres. "AI: Archival Intelligence and User Expertise." *The American Archivist* 66, no. 1 (2003): 51-78.

## Appendix A. Definitions of Primary Source Literacy

### **Bahde, "The History Labs: Integrating Primary Source Literacy Skills into a History Survey Course"**

"...helping students develop crucial historical thinking, analysis, and communication skills."  
(p. 175-176)

"Arlene Diaz and her colleagues recommend a progression that results in a fairly thorough set of skills.<sup>18</sup> These scholars surveyed history faculty within their department to discover what problems instructors were having with their students. The surveys showed frustration that students lacked the historical competencies that special collections librarians and archivists

would call primary source literacy skills. The study resulted in the development of a scaffolded curriculum recommended to teach these skills, over the four years of the history major. At the 100 level, they expect students to differentiate primary from secondary sources, learn how to analyze a primary source, and comprehend how to extract information from artifacts, contextualize them, and connect them back to course themes. The 200 level classes introduce historical empathy. In these classes, students should be able to interpret human agency in the context of how an artifact from the past was produced and of the times in which it was produced. At the 300 level, students are expected to be able to evaluate and explain the authority of sources and to engage with questions of ambiguity and contradiction. At the 400 level, students should be able to develop relationships among multiple sources and synthesize the major connecting issues among them.

Though the study presents a useful delineation of necessary primary source skills, identifying particular exercises or set curricula to teach these skills was not within its scope."  
(p. 180)

"The following skills were identified through this process:

- identify the basic features of a primary source; observe and describe creator, type of source, date created, place created, physical details;
- evaluate a primary source to detect bias and to engage with issues of authority, authenticity, ambiguity, contradiction, and tone;
- interpret content and analyze meaning;

- recognize links and relationships between primary sources and/or secondary sources;
- locate and select relevant primary sources;
- effectively use primary sources as evidence to support a perspective or argument;
- summarize sources and synthesize them into an argument; and
- respond to other perspectives using evidence from sources." (p. 183)

### **Blundell, "The Past is Prologue: Archival Literacy as Bridge between Archivists and Educators"**

"In summarizing literature on the concept, it is presented here that archival literacy focuses on two key elements: 1) A foundation of the basic "find, use, incorporate" model of information literacy, and 2) An appreciation for the specialized navigation and instruction skills needed to use effectively an archive or special collection (i.e., archival intelligence [Yakel and Torres 2003] or primary source literacy [Archer et al. 2009]). Additionally, special focus on the role of primary source documents in research, learning, and general knowledge creation is fundamental to promote effectively the need for and appropriate incorporation of archival literacy into one's general knowledge base." (p. 41-42)

### **Daines and Nimer, "In Search of Primary Source Literacy: Opportunities and Challenges"**

"A full definition of primary source literacy will need to include both components of broader information literacy goals, as well as specific training for the unique materials found in cultural heritage repositories. Primary source literacy should describe the skills and knowledge that allow individuals to locate, evaluate, and use cultural heritage materials effectively. Drawing on the literature reviewed above, we have concluded that information literacy goals applicable to primary source materials include:

- Understanding the variety of tools available for locating cultural heritage materials and how to use those tools. These tools include library catalogs, finding aid databases, and collection guides;
- Understanding and being able to articulate the difference between primary and secondary sources;
- Understanding the importance of contextualizing information extracted from cultural heritage materials;
- Understanding the political, legal, and ethical issues surrounding the use of cultural heritage materials; and

- Understanding how to apply critical thinking skills to cultural heritage materials.

A strong definition of primary source literacy will also need to incorporate concepts specific to using cultural heritage materials. Users of primary sources need to understand the impact that preservation processes undertaken by cultural heritage institutions, as well as the presentation of the materials, have on the meaning of the collections themselves. Goals relating to this area might include:

- Developing cultural heritage literacy, including an understanding of the various theories undergirding the work of cultural heritage professionals as well as how those theories inform practice and procedures;
- Understanding how cultural heritage professionals interact with the materials under their care, and how their interventions impact primary sources; and
- Understanding how labels and other displays are used by cultural heritage professionals to create a narrative or argument.

Finally, primary literacy goals should promote understanding of the physical aspects of these materials as information artifacts and not merely information objects, such as:

- Understanding the context of the source's physical creation, including technological processes employed in its creation;
- Understanding the implications of using surrogates of primary source materials; and
- Understanding how to appropriately handle primary source materials." (p. 31-32)

"The following list is an attempt to begin articulating some of the key components that this standard should address. The list is not meant to be prescriptive, but rather a starting place for further discussion.

In an interdisciplinary, higher education environment, a primary source literate individual is able to:

- Use primary sources effectively;
- Find and access needed primary sources effectively and efficiently;
- Evaluate primary sources critically;
- Interpret and analyze the meaning of primary sources;
- Determine the nature and extent of primary sources needed for a given project;
- Understand the ethical, legal, social, and economic issues surrounding the creation and use of primary sources;
- Access and use primary sources ethically;
- Determine the context of the source's physical creation;
- Understand the impact of cultural heritage professionals on the meaning of primary sources; and

- Appropriately handle primary source materials.

Each of these components will need to be further developed and then paired with appropriate learning outcomes which can be used to develop learning activities.” (p. 33)

### **Daines, Yakel, Grob “Progressing Primary Source Literacy: Guidelines, Standards, and Assessment” RBMS 2013**

“Core knowledge and skill sets that comprise information literacy for primary sources.” (slide 4)

“Understanding the variety of tools available for locating archival materials and how to use those tools. These tools include library catalogs, finding aid databases, and collection guides; Understanding the difference between primary and secondary sources; Understanding the importance of contextualizing information extracted from archival materials; Understanding the political, legal and ethical issues surrounding the use of archival materials; and Understanding how to apply critical thinking skills to archival materials.” (slide 16)

“Developing archival intelligence, including an understanding of archival theory, practice, and procedure; and Understanding the implications of using surrogates of archival materials.” (slide 17)

“The information literate student:

1.2.e. Differentiates between primary and secondary sources, recognizing how their use and importance vary with each discipline

1.2.f. Realizes that information may need to be constructed with raw data from primary sources.” (slide 53)

### **Hangen, “Historical Digital Literacy, One Classroom at a Time”**

Basic features of digital history skills:

locating and analyzing sources critically,

constructing historical interpretations through debate and scholarly argument, and

communicating their ideas effectively in today’s media environment.

“There is much more to do beyond these basics, and some in our field are already far ahead in involving history students in coding, developing applications, and in using three-dimensional printing and other cutting-edge digital initiatives...”

## **Morris, Mykytiuk, Weiner “Archival Literacy for History Students: Identifying Faculty Expectations of Archival Research Skills”**

archival literacy (p. 397): “the knowledge, skills, and abilities necessary to effectively and efficiently find, interpret, and use archives, manuscripts, and other types of unique, unpublished primary sources”

## **Weiner, Morris, and Mykytiuk, “Archival Literacy Competencies for Undergraduate History Majors”**

Archival literacy can be considered a contextual application of information literacy (the ability to recognize a need for information; identify the sources needed to address a given problem or issue; find, evaluate, and organize the needed information; and use the information effectively to address the problem or issue at hand).

*List of Archival Literacy Competencies for Undergraduate History Majors [Revised September 2014]*

### **ACCURATELY CONCEIVE OF PRIMARY SOURCES**

1. Define and articulate differences between primary, secondary, and tertiary sources.
2. List common types of primary sources used in conducting historical research.
3. Articulate the value of primary sources to historical research, communicating a real or imaginary example illustrating value. Explain why historians are expected to use primary sources in their research and scholarship.

### **LOCATE PRIMARY SOURCES**

4. Distinguish between types of repositories that collect primary sources, including libraries, archives, museums, and special collections.
5. Name some of the wide variety of types of archival repositories, using adjectives that refer to various spheres of organized activity, such as business.
6. Give examples of some kinds of materials held in different types of archival repositories, such as religious archives, business archives, university archives, government archives, etc.
7. Locate and effectively use the web sites created by archival repositories and special collections libraries including reviewing finding aids, available online archival sources, hours, and policies prior to visit.

8. Locate particular special collections and archival repositories in a given geographic proximity, including capabilities for obtaining copies of documents without travel, and search effectively for primary sources within these existing archives and special collections in the community, state, region, and country.
9. Identify and effectively use (search) the major bibliographic databases for locating primary sources.
10. Describe how to locate and use archival finding aids.
11. Explain the lack of online access to many archival materials.

#### USE A RESEARCH QUESTION, EVIDENCE, AND ARGUMENTATION TO ADVANCE A THESIS

12. Formulate and develop a research question to be answered using primary sources.
13. Accumulate multiple primary sources, as well as secondary resources, to build or support a case for a research thesis or argument.
14. Evaluate and synthesize information and arguments from both primary and secondary sources for evidence.
15. Construct an argument using primary source materials.
16. Explain the constructed nature of history, some possible reasons for gaps in the historical record that might result from wartime and other circumstances, and how to identify promising and possible alternative search strategies for the information one is seeking.
17. Recognize historical styles of handwriting and outmoded printed scripts or fonts. Read manuscripts and books that are written or printed in these.
18. Interpret and analyze both print and digital primary sources. Include: description of the features and vulnerabilities of the physical or digital object, means for evaluating authenticity including provenance, methods for historical contextualization, indications of the purpose and intended audience, and observations that may be used to identify bias.
19. Interpret a variety of types of primary sources to glean information from them. Critically analyze and write in a critically informed way about a variety of types of sources used in historical research, such as institutional records, rare books, photographs, charts and maps, manuscripts and personal papers, ephemera, born-digital materials, 3-dimensional artifacts, audio-visual materials, and oral history interviews.
20. Articulate common biases in primary and secondary sources to be aware of in assessing their trustworthiness.
21. Describe tactics for gaining access to multiple perspectives and narratives.

#### OBTAIN GUIDANCE FROM ARCHIVISTS

22. Explain the role and potential value of the research consultation with archives staff.
23. Communicate a variety of information needs effectively to archivists, both orally and in writing.

#### DEMONSTRATE ACCULTURATION TO ARCHIVES

24. Define common terms used by archivists and historians in conducting research, such as “repository,” “finding aid,” “manuscript,” “provenance,” “IRB,” etc.
25. Describe the differences between archival records, personal papers and manuscripts, and rare books.
26. Communicate a rationale that justifies security and preservation measures taken by archival repositories.
27. Find the requirements for researchers’ use of a specific archival repository.
28. Describe common policies and protocols for conducting research in archival repositories, including the researcher registration process, the kinds of materials that are commonly not allowed into the repository, and processes for duplication.
29. Describe the care and handling processes for using original physical materials. Explain both why these processes are necessary and why they are important.
30. Articulate the ways in which using, experiencing, and handling original primary sources differ from digital primary sources (whether born digital or digitized) or other types of facsimiles (microfilm, microfiche, etc.).

#### FOLLOW PUBLICATION PROTOCOLS

31. Describe how one can legally and ethically incorporate unpublished sources into one’s work.
32. Take effective notes on unpublished materials to capture full citation information for the materials in a paper.
33. Cite different types of unpublished primary sources such as documents, photographs, and artifacts, using more than one style of citation.
34. Describe how to obtain permission from the archival repository or library to quote from, reproduce, and/or reuse the collections in a paper or other type of publishable work.

#### ADVANCED SKILLS (NOT REQUIRED FOR UNDERGRADUATE HISTORY MAJORS)

35. Explain the differences in copyright for published and unpublished sources.

36. Specify some common restrictions placed on unpublished materials and justify such restrictions by giving the legal and ethical reasons for them.
37. Use materials from multiple archival repositories or special collections libraries.
38. Communicate effectively about one's research experience orally, visually, and in writing.
39. Produce a scholarly work that incorporates primary and secondary sources as evidence and is suitable for publication, both in writing and in a formal oral/visual presentation or demonstration.
40. Articulate issues relating to the historical memory of society that are relevant to archival research.
41. Describe some of the reasons a history major might consider a future career in the archives profession.
42. Explain how to locate special collections and archival repositories internationally.
43. Describe some ways that archival materials are collected and processed by archivists, as well as the primary archival theory and practices that guide this work (provenance, original order, etc.).
44. Recognize common preservation, organization, and archival processing techniques to distinguish the way materials have altered since being acquired by a repository. Distinguish between the work an archivist may do to make a collection accessible and to preserve it versus the work an author, creator, or collector might do, and give some instances of when to avoid drawing false conclusions based on appearance of the items.
45. Give examples of factors that might influence the order in which material is organized in an archival repository.
46. Describe effective techniques for conducting oral history interviews so that the interviews can be reused in a publication or scholarly work.
47. Describe common requirements for creating, storing, and publishing oral histories (IRB certification for conducting human subjects research).
48. Describe some ways in which archival repositories function in other countries and how access to primary sources may differ in those countries.
49. List various ways in which collections in archival repositories and special collections grow over time and how materials that may not have been available in initial visits to archives may become available in the future.
50. Plan all aspects of an archival visit that requires travel and advance accommodations including researching available travel grants.

51. Describe some of the common ways that records are created, assembled, collected, and transmitted prior to being acquired by the archival repository, and how factors such as the chain of custody and provenance of a source can influence its authenticity (diplomats).

**Williams and Mulroney, "Doing It Yourself: Special Collections as a Springboard for Personal, Critical Approaches to Information"**

"Here we reach a lacuna in the literature on special collections instruction. It is clear that instruction has a vital role in our ability to articulate the value and purpose of special collections to the mission of our home academic institutions and to the broader value of knowledge and critical thinking within our world." (p. 375)

## Appendix B. Sample Learning Outcomes

### **Bahde, “The History Labs: Integrating Primary Source Literacy Skills into a History Survey Course”**

#### Exercise 1: Fundamentals Learning Objectives:

- Identify different types of primary sources (letters, diaries, newspapers, ledgers, ephemera, photographs, published books, reports).
- Identify basic features of primary sources, such as creator, place of creation, date of creation, and intended audience. (p. 185)

#### Exercise 2: Interrogating Sources Learning Objectives:

- Interpret and analyze a source’s content and physical details.
- Evaluate issues of authority, bias, provenance, authenticity, and tone in a source. (p. 187)

#### Exercise 3: Research Uses Learning Objectives:

- Observe and communicate potential scholarly uses for primary sources.
- Recognize the role of primary sources in the cycle of scholarship.
- Distinguish links and relationships between primary sources and/or secondary sources. (p. 188)

#### Exercise 4: Gathering Evidence Learning Objectives:

- Evaluate primary sources to determine relevance to an historical question.
- Identify and communicate evidence to support a perspective or argument. (p. 190)

#### Exercise 5: Exhibit Build Learning Objectives:

- Evaluate and select sources in support of a perspective or theme.
- Summarize sources and synthesize them into an argument. (p. 191)

#### Exercise 6: Debate Learning Objectives:

- Summarize sources and synthesize them into an argument.
- Respond to other perspectives using evidence from sources. (p. 193)

### **Bahde, Smedberg, Taormina, “Using Primary Sources: Hands-On Instructional Exercises”**

#### Features of primary source literacy (introduction, p. xix-xx):

- Identifying a variety of source formats and types

- Searching for and locating primary sources
- Understanding the key features and operations of these tools
- Learning to generate relevant keywords
- Observation and descriptive skills
- Interpreting and analyzing primary sources
- Recognizing primary sources and their often complex relationship to secondary sources
- learning to generate questions about an object or topic
- Developing and testing hypotheses
- Recognize the life cycle of documents
- Using primary sources as evidence
- Applying reading room guidelines and access procedures
- Conveying interpretations in a product
- Using primary sources ethically
- Understanding legal and social issues represented in primary sources
- Cultivating historical imagination
- Developing historical empathy, curiosity about the past, and appreciation for historical materials

**Blundell, “The Past is Prologue: Archival Literacy as Bridge between Archivists and Educators”**

“being able to find and use a collection in an archive” (p. 42)

**Carini, “Information Literacy for Archives and Special Collections: Defining Outcomes”**

In addition to the learning outcomes listed below, Carini also provides charts of standards and learning outcomes applicable for each year of study (first-year through senior).

*Know*

The first standard, “Know,” is the simplest and can be achieved by the most basic interaction with primary sources, such as a brief orientation or a short show-and-tell session. Teaching

students to “Know” introduces them to the existence of primary sources, teaches them to recognize primary sources, and familiarizes them with the range and variety of these sources as well as their relationship to secondary sources. This concept is a mix of archival intelligences and artifactual literacy. The outcomes are:

1. Knows that archives and special collections exist and are there to be used.
2. Knows what constitutes a primary source.
3. Is aware of the range of primary sources that may be found in a repository.
4. Understands the role of secondary sources in relation to primary sources.

### *Interpret*

The second standard, “Interpret,” is one of the most important skills students must acquire to work with primary sources. It is presented early in the order of standards because it is essential that students are able to interpret the information in primary sources; if they can find a source but cannot interpret it, the data in the source are of no use. This standard is based solidly in the area of artifactual literacy. Teaching students to “Interpret” provides them with the tools and specific skills they need to extract, understand, and interpret the information in a variety of primary sources. It also teaches students the importance of chronology and context in the formation of a narrative, as well as advanced skills surrounding the interpretation of silences or gaps in the archive and other issues related to underrepresented groups. The outcomes are:

1. Knows the importance of, and how to use, observation as a tool to understanding and analyzing documents.
2. Understands the importance of audience (is the audience an individual as in the case of a private letter, or the world as in the case of a press release or published work).
3. Understands the importance of the relationship between the creator and the audience (what one writes to a parent from college is different from what one writes to a friend or sibling and therefore should color the use and evaluation of the content).
4. Understands the importance of dates (a date can add context to a document that can enhance a researcher’s understanding of the circumstances surrounding its creation).
5. Can interpret the tone of a document, lending an understanding of the creators, their mood, and their outlook.

6. Knows how to physically evaluate primary sources. (For example, understands that the quality of the paper, ink, handwriting, and imprint or impression—if printed—plays a role in interpreting primary sources.)
7. Has an understanding of the importance and role of chronology.
8. Understands the nature and syntax of a variety of document types and sources, including written, printed, visual, and financial.
9. Understands historical context and its importance in the interpretation of primary sources.
10. Can create a narrative from a variety of primary sources.
11. Can recognize and interpret silences or gaps in the archives.
12. Knows how to interpret evidence surrounding underrepresented or nonliterate groups.

### *Evaluate*

The standard “Evaluate” is closely related to “Interpret” and “Use,” and is where we start to delve more deeply into archival intelligences. To evaluate, in the archival context, encompasses understanding the archival principle of provenance—that is, the history of the item and its ownership—and how it relates to finding appropriate repositories, collections, and documents. The outcomes for “Evaluate” are:

1. Understands the archival principle of provenance.
2. Knows how to find repositories appropriate to a particular research topic.
3. Knows how to determine which collections in a repository are appropriate to the research.
4. Knows how to determine which individual sources in a collection are appropriate to the research.

### *Use*

“Use” is designed to teach students about the physical handling of primary source materials as well as about restrictions to access. It also aims to impart the role of citation and, perhaps most importantly, the need for a flexible research process. The outcomes are:

1. Knows the proper way to physically handle a variety of primary source materials.
2. Understands the concept of a collection (for example, a repository or a group of manuscripts or records).

3. Understands the importance of original order.
4. Understands the role and use of restrictions to access.
5. Has a basic knowledge of copyright and fair use.
6. Knows how to properly cite primary source materials.
7. Understands the importance of a flexible research process that lends itself to change and departure from the usual methods when appropriate.

### *Access*

The standard “Access” may appear to mirror the standard “Evaluate,” but there are important differences. “Evaluate” is primarily focused on the concept of provenance and how it can be used to identify appropriate repositories, collections, and sources. “Access” focuses on how to locate repositories, collections, and documents in general. More specifically, it involves how to use and interpret finding aids, collection guides, and other documents that summarize the contents and organization of stored materials to facilitate their access and use. It also helps students understand that surrogates—scholarly editions of primary sources whether digital, paper, or microfilm—are mediated versions of primary sources because almost all are edited to some degree. The outcomes for “Access” are:

1. Knows how to identify and find primary source repositories.
2. Knows how to find primary source collections.
3. Understands finding aids and their structure.
4. Understands the relationship between originals and surrogates—both print and digital.

### *Follow Ethical Principles*

“Follow ethical principles” introduces students to the ethical use and portrayal of primary source materials. The outcomes are:

1. Understands the consequences of removing data from their context in order to reshape them to make a point.
2. Understands the consequences of the destruction or alteration of primary sources and the dangers associated with such actions.
3. Understands the consequences of the misrepresentation of individuals represented in primary sources.

4. Understands the importance of presenting a balanced picture by including alternate points of view.
5. Understands the importance of being true to the chronology.

### **Daines and Nimer, "In Search of Primary Source Literacy: Opportunities and Challenges"**

"Potential learning outcomes developing out of primary source literacy standards could include:

- Demonstrate an understanding of cultural heritage literacy through the application of research skills, cultural heritage principles and theory, and cultural heritage practices to your own research;
- Locate primary source materials in local and national databases, indexes, and other utilities;
- Demonstrate the ability to judge and differentiate between primary and secondary sources;
- Identify methods used by your discipline to analyze and incorporate primary sources into your research;
- Determine subject, narrative, and research application of primary sources in order to demonstrate the analytical skills needed to conduct research; and
- Demonstrate the ability to provide proper research documentation." (p. 34)

### **Daines, Yakel, Grob "Progressing Primary Source Literacy: Guidelines, Standards, and Assessment" RBMS 2013**

"Demonstrate an understanding of archival intelligence through the application of research skills, archival principles and theory, and archival practices to their personal research; Describe the scope and characteristics of the archival profession; and Explain the importance of archives and archival materials to research" (slide 25)

"Transferrable skills (study skills, time management)  
Experiential learning and reinforcement =Confidence  
Willingness to return" (slide 46)

"A chance to see something 'real' that is not a digital copy or facsimile  
A way to share the excitement that I've experienced working with primary sources  
Their excitement sparked about original primary source materials

Their excitement sparked about doing research

Reinforcement of the course content by having them make connections in a different way”  
(slide 65)

### **Daines, Yakel, Grob “Progressing Primary Source Literacy: Guidelines, Standards, and Assessment” RBMS 2013**

“I want to make an aside about the differences between teaching with archival collections or documents and teaching with rare books. I am aware that these are gross generalizations, but they might be worth thinking about:

- The structure of an archival collection needs explaining to uninitiated students
- Finding what you need within an archival collection is a challenging process
- Single items such as letters or photographs can often be examined in a class period, and many items in archives are contemporary and in English” (Slide 11)

“On the other hand:

- Rare books are usually in a format that students are familiar with (at least for now)
- The general organization of rare books makes sense to students
- But rare books may be difficult to penetrate because they are too long to fully examine in class, they’re often in foreign languages, or their cultural context is unfamiliar” (Slide 12)

### **Daniels & Yakel, “Uncovering Impact: The Influence of Archives on Student Learning”**

Cite Magia Krause’s 2010 article that assessed the following archival literacy skills: observation, interpretation/historical context, evaluation/critical thinking, and research

### **Dreier, Hertrick, and Millett, “Primary Source Literacy”**

Reading primary sources; critical analysis; collaboration (slide 5)

### **Garland, “Locating Traces of Hidden Visual Culture in Rare Books and Special Collections: A Case Study”**

“Schmiesing and Hollis, a professor and a special collections librarian, outline their successful classroom collaboration for student-centered active learning and cite as learning

outcomes: increased student motivation; greater understanding of course themes; and the ability to reflect on the rare materials in a new and more focused context in relation to their physical containers.” (p. 315)

“The research required to locate, study, and document these items aligns with the *Visual Literacy Standards*, which state that in an interdisciplinary, higher education environment a visually literate individual is able to:

1. Determine the nature and extent of the visual materials needed
2. Find and access needed images and visual media effectively and efficiently
3. Interpret and analyze the meanings of images and visual media
4. Evaluate images and their sources
5. Use images and visual media effectively
6. Design and create meaningful images and visual media
7. Understand many of the ethical, legal, social, and economic issues surrounding the creation and use of images and visual media, and access and use visual materials ethically.” (p. 379)

“Teaching with special collections offers an opportunity to introduce the foundations of information and the organization of knowledge. Exposure to traditional reference sources and bibliographies or simply demonstrating how to use a back-of-the-book index may inform and improve online searching ability and understanding of sources in general. Indeed, context is key--for students immersed in a digital environment, text and images are often disjointed and removed from the original context.” (p. 326)

### **Herbison, Farley, Kocken, and Spalenka, “Outreach Overhaul: Progressive Pedagogy in the Archives”**

- Students demonstrate critical thinking skills to analyze primary sources.
- Students analyze primary sources and understand their role in the context of an archival collection.
- Students gain a deeper knowledge of their research topics through primary source analysis.
- Students work together to understand and articulate key concepts about their primary sources.

- Students express confidence in their ability to conduct researching using archival and primary sources.

- Instructors express confidence that instructional sessions in the archives result

in desired student outcomes. (Slide 5)

### **Johnson, "Primary Source Paradise: Trends in Teaching History"**

"To have my students read them, whether it is a battlefield map from Gettysburg or a letter from Jefferson to Lewis and Clark or a photograph from the Great Depression, the primary document allows me to place my students in history and teach them not only about history but also more importantly, making choices, how to think critically, and how to plan ahead. In addition, the document teaches context. Something always came before and something will happen after a choice is made." (Teaching U.S. History in the 21st Century blog post)

### **Maksin and Clements, "Beyond the Physical Archive: Imagining Primary Source Literacies in the Digital Age"**

"In the instruction classroom, pairing local archival materials with related digitized materials also offers an opportunity for the archivist to elucidate valuable concepts of archival research that are often lost when students interact solely with online sources: where primary sources come from, how collections end up in archives, why some collections are more readily discoverable than others, and what finding aids can reveal about sources." (p. 64)

"Identify available primary sources created at the time of a specific historical event or question." (p. 65)

"Identify strategies for finding different types of primary sources." (p. 66)

"Evaluate collections of digitized primary sources in order to gain a deeper understanding of how these collections and sources fit with an individual research need." (p. 67)

"In a hybrid research environment, identify and use the most efficient format of a source, based on the research need." (p. 68)

“Understand the socio-economic and legal issues that relate to the availability and use of digitized primary sources.” (p. 68)

“A thorough grounding in primary source research practices in the archives and beyond will prepare students to assume new roles as scholars and creators.” (p. 69)

### **Obien, “Special Collections+Developing a Primary Source Literacy Curriculum”**

- “Develop critical research skills needed for using primary sources (Specifically archival material)
- Provide Students with an opportunity to work with original archival material and promote interest in historic preservation.” (slide 5)
- “Identify types of archival material in order to demonstrate the essential ability to judge and differentiate between various archival media.
- Determine subject, narrative, and research application of archival material in order to demonstrate the critical interpretative and analytical skills needed to conduct primary source research.
- Cite archival material in order to demonstrate the ability to properly document primary sources.” (slide 7)

### **Passehl-Stoddart, “Imagination at Work: Reaching New Users with Innovative Instruction and Outreach”**

Creative interaction with archival materials and rare books

### **Swanik and Garland, “Curating print collections in the digital age”**

In the assignment, a visual analysis of one of four selected items on display, students were asked to describe the painting techniques of a leaf of their choice and provide a detailed description of the techniques used, the paint colours and the artistic visual effects. The two-page assignment also required that students spend time with both the physical works and the digital images and consider the two different viewing experiences, drawing on the differences and similarities between the physical and digital realms

### **Weiner, Morris, and Mykytiuk, “Archival Literacy Competencies for Undergraduate History Majors”**

Edwin Bridges, Gregory S. Hunter, Page Putnam Miller, David Thelen, and Gerhard Weinberg organized a brief treatment of archival research competencies for graduate students in history into “developing a research strategy; an overview of archival principles and practices; understanding archival principles and practices as a means of locating evidence; and understanding the nature and use of archival evidence.”

The four areas may be summarized as follows:

1. Developing a research strategy includes framing the historical question, setting a research goal, formulating a guiding thesis, and devising “a process for locating and ordering the data that can address the question in a persuasive manner.” The researcher needs to continually refine or revise the strategy and/or process in light of increasing awareness of sources and content. Collaboration between historians and archivists can be especially beneficial to students for developing research strategies, though students and faculty may underestimate the value of a conversation with an archival specialist.
2. An overview of archival principles and practices takes into account the uniqueness, provenance, intended functions, and original order of the archival materials, as well as the fact that they are appraised, arranged, and described as collections, or fonds, rather than treated as individual pieces. Accurate interpretation of archival records can only be achieved by attending to their institutional context, the relationships between collections and collecting repositories, the documentation strategies that determine what is kept, and the descriptive strategies aimed at informing researchers about the records. These matters are the archivist’s province, but researchers need to understand and use them.
3. Understanding archival principles and practices as a means of locating evidence requires historians to know how archival systems operate. Beyond learning to use the succinct descriptive inventories of large volumes of materials that finding aids provide, they need to consider the administrative function and purpose of archives within an organization. Thus, in some instances, awareness of “the structure and functions of the organization” is a revealing aid to archival research. Skillful use of search terms, searching by the function or the form of the record, understanding in advance the access and usage restrictions, and recognizing archivists’ attempts to

balance access with preservation are all parts of the archival literacy that graduate history students need.

4. Understanding the nature and use of archival evidence means adopting a critical approach to “learn the way that documentary evidence may have been written to achieve—or conceal—a certain purpose.” Errors in apparently objective, basic facts could easily have been accidental, but might also have been intentional. The interplay between the archival record itself and the description of it can develop a researcher’s understanding of the evidence and lead to other sources.

### **Williams and Mulrone, "Doing It Yourself: Special Collections as a Springboard for Personal, Critical Approaches to Information"**

“develop effective skills for finding, evaluating, and using information in unfamiliar environments” (p. 367)

“we were interested in having the students publicly showcase their work in the library and engage with a variety of library staff along the way, uncovering the different social and professional linkages among researchers and information professionals. We were also interested in introducing students to manuscript and rare book collections, exploring scarcity and serendipity in discovering personally meaningful items, and articulating the ways in which those materials were produced and distributed.” (p. 376)

### **Ziarko, "Primary Source Literacy LibGuide"**

- Ability to evaluate primary source (LibGuide landing page/Home)
  - internal--the information within the resource
  - external--provenance of the resource