Society of American Archivists
Standards Committee

SAA-ACRL/RBMS Joint Task Force on the Development of Guidelines for Primary Source Literacy (JTF-PSL)

Submission Packet Cover Memorandum for Standards Committee Review of *Guidelines for Primary Source Literacy*
January 2018
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BACKGROUND

The Joint Task Force on the Development of Guidelines for Primary Source Literacy (JTF-PSL) was jointly charged by Society of American Archivists (SAA) Council and the Executive Committee of the Rare Books and Manuscripts Section of the Association of College and Research Libraries (ACRL/RBMS) in late 2014/early 2015[1] with the following tasks:

- "Develop a definition of primary source literacy and a set of guidelines—standards, performance indicators, and outcomes directed at college and university students. These Guidelines will address primary sources wherever they might be available (e.g., in physical collections, in published volumes, in licensed databases) and will be applicable to a wide range of institutional types that offer instructional services."
- "Consult broadly in developing Guidelines with professional organizations of those who teach and use primary sources, in addition to archives and library organizations."
- "Ensure that the language and scope of the Guidelines are appropriate for those teaching and learning with primary sources."
- "Publicize and conduct public hearings, public comment periods, or both to ensure that members of the archives and library professions have adequate opportunities to become aware of and contribute to the development of the Guidelines."
- "Follow procedures outlined in SAA's *Procedures for Review and Approval of an SAA-Developed Standard* and ACRL's *Procedures for Preparation of New Standards and Guidelines* to ensure that the SAA Council, ACRL Standards, and RBMS Executive Committee can approve and adopt the Guidelines in a timely manner."

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[1] The full ACRL/RBMS charge is located at http://www.ala.org/acrl/rbms/acr-rbmtfpsl?year=2017, and the full SAA charge at https://www2.archivists.org/governance/handbook/section8/groups/SAA-ACRL-RBMS-Joint-Task-Force-on-Primary-Source-Literacy.

The impetus for the development of a definition of and guidelines for primary source literacy emerged from the work of a 2012-2013 RBMS Task Force on Metrics and Assessment. The final report of that group recognized that the absence of any guidelines or best practices relating to primary source literacy would be an ongoing impediment to a desire to assess the impact of archivists' and librarians' teaching and outreach efforts relating to primary sources. To that end Anne Bahde and Heather Smedberg of RBMS worked with Lisa Sjoberg, then chair of SAA's Reference, Access, and Outreach Section (RAO) to consult broadly within SAA, ACRL, and RBMS about the desirability of appointing a joint task force to undertake the development of guidelines for primary source literacy.[2]

The JTF-PSL conducted its work as charged between September 2015 and July 2017. This submission packet provides required documentation to the SAA Standards Committee for its review of the consultation process undertaken by the JTF-PSL, which culminated in the final version of the *Guidelines for Primary Source Literacy.* If the Standards Committee review is successful, and if deemed appropriate, the "Future Considerations" section of this document provides additional information and suggestions that may assist the Standards Committee and Council in determining a longer-term maintenance plan for the *Guidelines for Primary Source Literacy*. Information in the "Future Considerations" section may also contribute to ensuring that an active infrastructure within SAA is providing the support archivists will undoubtedly need in deciding how best to implement the *Guidelines* and assess their effectiveness and impact as a basis for outreach and instruction programs in a variety of types of institutions responsible for maintaining and providing access to primary sources in archives.

SUBMISSION PACKET CONTENTS

In addition to this cover memorandum, the submission packet includes the following:
- *Guidelines for Primary Source Literacy*, final version, July 2017 (revised November 2017 and January 2018 to incorporate final suggestions from the ACRL Information Literacy Frameworks and Standards Committee).
- Documentation of the JTF-PSL Consultation Process, August 2015-July 2017, to Accompany the SAA Standards Committee Submission Packet.
- Final Report of the JTF-PSL (July 2017).

FUTURE CONSIDERATIONS

In its charge, the JTF-PSL was asked to "recommend a plan for maintenance and review of the *Guidelines* at the time the *Guidelines* are submitted to SAA and ACRL/RBMS for approval." In addition, through the process of gathering feedback on guidelines drafts, the JTF-PSL heard from many respondents a desire to see the following two things in the *Guidelines for Primary Source Literacy*:

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[2] For additional information on the work leading to the formation of the JTF-PSL, see the SAA Standards Committee's November 2014 proposal to Council to form the group, available at https://www2.archivists.org/sites/all/files/1114-II-D-Stds-JtTF-Literacy_0.pdf.

1. Examples of the application, in a variety of disciplinary and repository settings, of the learning objectives included in the *Guidelines*.
2. Examples of or suggestions for ways to assess or measure success of the learning objectives in instruction and other outreach events in a variety of disciplinary and repository settings.

Providing examples of application and assessment

Members of the JTF-PSL discussed at length the inclusion of application examples and assessment strategies at part of the *Guidelines*, but in the end decided that doing so was not in the best interest of creating broadly applicable *Guidelines* and learning objectives. First and foremost, we acknowledged that all twelve members of the JSF-PSL work in college and university settings, primarily with humanities faculty. We were cautioned by several commentators in online and in-person feedback not to make the *Guidelines* too specific to be successfully used by archivists, librarians, and other instructors outside of the college and university environment. We concluded that including application examples from our own experience as part of the *Guidelines* might encumber others in envisioning application of the *Guidelines*' learning objectives in other settings. In addition the limited timeframe for our charge, coupled with the fact that the JTF-PSL is not a standing body within either SAA or RBMS, suggested that creating an ongoing process for sharing information about application and assessment of the learning objectives in these guidelines, contingent on organizational approval by SAA and ACRL/RBMS, would be a more inclusive, transparent, interactive, and successful strategy for providing relevant examples. Many commentators noted affirmatively the relative brevity of the guidelines and the fact that they were not laden with examples, while others continued to express a desire for application examples, including assessment strategies.

To address the desire for examples of learning objective application and assessment in a variety of real-life settings, the JTF-PSL, in conjunction with the leadership of RAO, worked with Chris Prom, SAA Publications Editor, and Teresa Brinati, Director of Publishing, to develop a framework for an SAA epublication series, *Case Studies on Teaching with Primary Sources* (TWPS). This effort was modeled on the extant epublication series *Case Studies in Archival Ethics*, which is under the purview of the Committee on Ethics and Professional Conduct and provides case studies that explicitly illustrate parts of the SAA Code of Ethics.[3] RAO is committed to actively maintaining the TWPS epublications series and appointing a series editor, who will report to the RAO steering committee for a two-year term. Bill Landis, an RAO member and SAA co-chair of the JTF-PSL, will serve as TWPS series editor for the first two years in order to provide continuity from the JTF-PSL in its rollout.[4] Whether or not the TWPS case studies series proves to be an effective means for facilitating community participation in

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[3] See: https://www2.archivists.org/groups/committee-on-ethics-and-professional-conduct/case-studies-in-archival-ethics.

[4] The TWPS epublications series was launched in January 2018 with the publication of the first case study. See https://www2.archivists.org/publications/epubs/Case-Studies-Teaching-With-Primary-Sources.

providing application and assessment examples will likely be one facet in the first review cycle for these guidelines.

Ongoing maintenance of the guidelines

As of the submission of this review package to the SAA Standards Committee in January 2018, the *Guidelines for Primary Source Literacy* have been approved by the RBMS Executive Committee and the ACRL Information Literacy Frameworks and Standards Committee. They have been forwarded to the ACRL Board for final approval as a standard of that organization.

If the SAA Standards Committee chooses to recommend to the SAA Council that the *Guidelines for Primary Source Literacy* be approved as an SAA standard, a mechanism for periodic review of the guidelines to determine if changes are needed will be required. As part of its approval of the guidelines, the RBMS Executive Committee created a new standing Instruction and Outreach Committee, which as part of its charge will be the group within RBMS to periodically review and if necessary revise the *Guidelines for Primary Source Literacy*. RBMS, as a smaller organization than SAA, does not have the same infrastructure of sections and committees that function within SAA. The clear counterpart within SAA to the new RBMS Instruction and Outreach Committee seems to be the Reference, Access, and Outreach Section (RAO). RAO already has a section-created Teaching with/about Primary Sources Committee, and will now also be the institutional home within SAA of the new *Case Studies on Teaching With Primary Sources* epublication series.

It seems to make good organizational sense to utilize the existing expertise of RAO's Teaching with/about Primary Sources Committee (and RAO more generally) to periodically collaborate with RBMS's Instruction and Outreach Committee to review the guidelines and recommend whether revision is necessary. The fact that the *Guidelines for Primary Source Literacy* is not a technical standard suggests that establishing a technical subcommittee of the Standards Committee might not be necessary in order to periodically review the need for revision. Since the SAA *Governance Manual* indicates that Sections may be asked by the Council to perform work on behalf of the Society[5], it may be necessary for the Standards Committee to initiate the review process (or respond to a request from the RBMS Instruction and Outreach Committee to do so) and request that the Council charge RAO and its Tw/aPS Committee to perform the review and report back to Council.

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[5] See Section IX.3 in the *Governance Manual*:
https://www2.archivists.org/governance/handbook/section9.