

Society of American Archivists Standards Committee

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

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SUMMARY

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 2015¹ 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.”

The JTF-PSL conducted its work as charged between September 2015 and July 2017. This is the final report of the JTF-PSL to the SAA Standards Committee. The report is accompanied by the final version of the *Guidelines for Primary Source Literacy*, along with the supporting documentation to assist the Standards Committee to review the *Guidelines for Primary Source*

¹ The full ACRL/RBMS charge is located at <http://www.ala.org/acrl/rbms/acr-rbmtfjpsl?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>.

Literacy and develop a recommendation to the SAA Council regarding the document's potential adoption as an official standard of the Society of American Archivists, per the *Procedures for Review and Approval of an SAA-Developed Standard*.

TASK FORCE WORK

Members of the Joint Task Force began work following the 2015 SAA annual meeting. The bulk of our work was accomplished through scheduled bi-weekly conference calls, which were held only as needed. Throughout the time working on our charge we have posted meeting and conference call minutes, work documents, and drafts of the *Guidelines* on our SAA-hosted microsite at

<https://www2.archivists.org/groups/saa-acrlrbms-joint-task-force-on-primary-source-literacy>.

We spent six months conducting and discussing background research in an effort to ensure as broad a disciplinary perspective as possible on the topic of primary source literacy, and also seeking to identify possible successful models for our final product. This effort focused on exploring places of potential intersection with the ACRL *Information Literacy Competency Standards for Higher Education*² and that document's January 2016 ACRL-approved replacement *Framework for Information Literacy for Higher Education*^{3, 4}. We also explored the websites of a number of discipline-specific professional organizations with possible interests in teaching primary source-based research, looking for articulations of guidelines, best practices, or standards of any type.⁵ Finally we conducted a review of professional literature that touches on primary source literacy⁶, and also assembled a communication plan and draft timeline for our work⁷.

During the course of our two-years of work on the *Guidelines* we worked as transparently as possible, regularly posting updates to our SAA-hosted microsite (and the companion ALA Connect site hosted by RBMS), and seeking feedback in both virtual and in-person venues. We posted our first draft of the *Guidelines* in June 2016 and focused our efforts to gather feedback on this initial work from the library and archives communities. We solicited feedback using an online digress.it version of the draft, hosted by the RBMS Web Team, which allowed commenters to log in and supply comments directly at relevant places within the document. We also provided a primarysourceliteracy@gmail.com email address for commenters who felt more comfortable providing feedback in that way. We hosted well-attended open forums on our work

² <http://www.ala.org/acrl/standards/informationliteracycompetency>

³ <http://www.ala.org/acrl/standards/ilframework>

⁴ The report on this activity is available at <https://www2.archivists.org/sites/all/files/JTF-PSLSubgroupReportACRLFrameworkDecember2015.pdf>.

⁵ The report on this activity is available at <https://www2.archivists.org/sites/all/files/JTF-PSLSubgroupReportOtherGuidelinesDecember2015.pdf>.

⁶ The report on this activity is available at <https://www2.archivists.org/sites/all/files/JTF-PSLSubgroupReportLiteratureReviewDecember2015.pdf>.

⁷ The report on this activity is available at <https://www2.archivists.org/sites/all/files/JTF-PSLSubgroupReportCommunicationsDecember2015.pdf>.

leading to the first draft of the *Guidelines*, and once available on the first draft itself, at the SAA 2015 annual meeting (Cleveland, OH, 20 August), the ALA 2016 midwinter meeting (Boston, MA, 10 January), the 2016 ALA annual meeting (Orlando, FL, 26 June), and the 2016 SAA annual meeting (Atlanta, GA, 4 August).

Following a summer of gathering feedback on the first draft, we worked in subgroups to analyze feedback and determine best approaches to incorporating it into a second draft. We posted the second draft of the *Guidelines* in April 2017. We again used an online digress.it version and the primarysourceliteracy@gmail.com address as the primary mechanisms for soliciting feedback. We broadened our outreach efforts to seek feedback on the second draft by sending emails to a host of organizations representing constituencies that have interests in primary source literacy⁸. As with the first draft, we used the following meetings to solicit in-person input on our work leading to second draft and on the draft itself: the 2017 ALA midwinter meeting (Atlanta, GA, 22 January), and the ALA annual meeting (Chicago, IL, 24 June). We will hold our final open forum on the *Guidelines* at the 2017 SAA annual meeting (Portland, OR, 26 July), which coincides with the expiration of our charge.

Serendipitously, the Information Literacy Section of the International Federation of Library Associations and Institutions (IFLA) hosted a satellite pre-conference at DePaul University in Chicago in August 2016. We were approached by organizers and encouraged to submit a panel proposal. Four JTF-PSL members (Samantha Crisp, Gordon Daines, Sarah Horowitz, and Heather Smedberg) presented a well-attended (approximately 90 participants) and well-received panel discussion of our work to that point, and then led 30-minute small group discussions, followed by a 30-minute “reporting out” discussion. This was immensely helpful, coming towards the end of our open comment period on the first draft of the *Guidelines*, to all members of the JTF-PSL as we began our work to analyze and make sense of the feedback we received.

RELATIONSHIP WITH THE ACRL INFORMATION LITERACY FRAMEWORK

The JTF-PSL’s work overlapped with a period of significant changes to the broader information literacy landscape. Throughout its work, RBMS appointees to the JTF-PSL have consulted with the ACRL Information Literacy Standards Committee on our ongoing work, and our determination not to closely mirror the structure and language of the ACRL *Framework for Information Literacy for Higher Education*, which was adopted in January 2016. Much of the work within ACRL since the *Framework’s* adoption has focused on relationships between the

⁸ Emails were sent to the following organizations soliciting feedback on the second draft of the *Guidelines*: relevant H-Net listservs, National History Day organizers in each of the 50 states and Puerto Rico, the SAA leaders listserv and the RAO Section distribution list, the RBMS listserv, Regional Archival Associations Consortium co-chairs, Reference and User Services Association of ACRL, Modern Language Association, American Historical Association, Organization of American Historians, American Association for State and Local History, National Council on Public History, National Council for History Education, American Association of Museums, National Council for Social Studies, National Council of Teachers of English, and American Studies Association.

Framework and various discipline-specific guidelines and standards for information literacy. Primary source literacy, while cognizant of varying applications within specific academic disciplines, transcends those disciplinary boundaries in important ways. We attempted to remain discipline neutral in our work on the *Guidelines for Primary Source Literacy*, while still remaining thoughtful about their relation to the broader *Framework* in which many may attempt to situate them when thinking about how best to utilize these *Guidelines*.

Finally, one of the primary areas on which we received a significant amount of feedback was the absence of examples in the drafts of the *Guidelines for Primary Source Literacy*. Omitting examples of application and assessment was a conscious decision of the members of the JTF-PSL for a number of reasons:

- JTF-PSL members represent a small number of types of institutions in which instruction, outreach, and assessment of research using primary sources may be important. We did not feel that we collectively had the institutional expertise to create broadly useful and applicable examples and possibly tacitly setting some kind of “standards” or best practices beyond the learning objectives included in the *Guidelines*.
- There is as yet no infrastructure designated within either SAA or RBMS (the RBMS Executive Committee, at its meetings in late June 2016 has approved the *Guidelines for Primary Source Literacy* and taken the initial steps of approving a new Instruction and Outreach Committee, which will presumably be charged with maintaining and updating the *Guidelines* for that organization) for active maintenance of the *Guidelines*. Members of the JTF-PSL were concerned with including examples in this document at a point where our group would be disbanded and there was no organizational home for ensuring representational and useful examples for communities seeking to use the *Guidelines*.

We felt that SAA’s infrastructure for case studies ePublications series⁹ are a promising model for allowing members of the archives, library, and other interested communities to provide successful and challenging examples of the application and use of the *Guidelines for Primary Source Literacy* and assessment based on instruction using them. This option seemed to be one that could be successful regardless of the organization decisions to be made within SAA and RBMS about the maintenance over time of the *Guidelines for Primary Source Literacy*.

Members of the JTF-PSL prepared draft documentation on what a possible ePublications series of *Case Studies on Teaching with Primary Sources* might entail, following existing models, and received enthusiastic support for pursuing this option from Chris Prom, SAA Publications Editor, and Teresa Brinati, SAA Director of Publications. Believing that the Reference, Access, and Outreach (RAO) Section of SAA would be an ideal institutional home for such an ePublications series, we then opened discussions with Su Kim Chung and Alison Stankrauff, chair and

⁹ See for example *Campus Case Studies* (<https://www2.archivists.org/publications/epubs/Campus-Case-Studies>) and *Case Studies in Archival Ethics* (<https://www2.archivists.org/groups/committee-on-ethics-and-professional-conduct/case-studies-in-archival-ethics>).

vice-chair respectively, to see if there was interest from within the section's leadership, which there was. The case studies ePublication, a single-blind peer reviewed series, presents interesting and complementary opportunities for the instruction and outreach community with RAO's Teaching with/about Primary Sources Committee¹⁰ and its work. Bill Landis, SAA's co-chair of the JTF-PSL, has agreed to serve as initial editor for the new SAA ePublications series *Case Studies on Teaching with Primary Sources*, and will work with Chris Prom and Teresa Brinati and the RAO Section leadership following the 2017 annual meeting to launch this effort.

FUTURE CONSIDERATIONS

Bill Landis will be in touch with the Standards Committee co-chairs to determine what additional supporting documentation¹¹ is needed to enable the Standards Committee to conduct its review of the *Guidelines for Primary Source Literacy* to prepare its report and recommendation to Council.

¹⁰ See

<https://www2.archivists.org/groups/reference-access-and-outreach-section/teaching-withabout-primary-sources-committee>.

¹¹ Per Section IIIB of *Procedures for Review and Approval of an SAA-Developed Standard*:

<https://www2.archivists.org/governance/handbook/section7/groups/Standards/Procedures-Review-Approval-SAA-Developed-Standard>.