

CASE #15

Teaching with Primary Sources Remotely

AUTHORS

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LEARNING OBJECTIVES ENGAGED FROM [GUIDELINES FOR PRIMARY SOURCE LITERACY](#) BY THIS CASE STUDY

- 1.B. Articulate what might serve as primary sources for a specific research project within the framework of an academic discipline or area of study.
- 3.B. Identify and communicate information found in primary sources, including summarizing the content of the source and identifying and reporting key components such as how it was created, by whom, when, and what it is.
- 4.F. Demonstrate historical empathy, curiosity about the past, and appreciation for historical sources and historical actors.
- 5.A. Examine and synthesize a variety of sources in order to construct, support, or dispute a research argument.

CASE STUDY LOCATION Sonoma State University
Rohnert Park, CA
<https://www.sonoma.edu/>

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Introduction and Institutional Context

Sonoma State University (SSU), founded in 1960, is a public, comprehensive university. Located in Rohnert Park, 45 miles north of San Francisco, Sonoma State is one of the smallest members of the California State University system with approximately 8,200 students.¹ In January 2020, the university's library was staffed by eight full-time professional librarians and twenty-seven full-time staff and student assistants and managed about 850,000 print and electronic books, serials, and media.² The library's Special Collections had about 6,500 linear feet of archival materials with special focus on the North Bay region and politics, Jack London, and environmental history and politics.

Under leadership from the instruction coordinator and special collections librarian, all professional librarians at SSU participate in archival instruction. Because each professional librarian serves as liaison to several departments, they lead course-integrated instruction regarding special and archival collections as needed by the departments' curricula. The special collections librarian supports this instruction by organizing and making available materials. The instruction coordinator also supports this instruction by helping to establish session objectives, lesson plans, and learning assessments. Overall, the library strongly encourages classes to visit Special Collections for primary source instruction. Class sessions are almost always customized for instructor preference or course objectives and may include

- an introduction to using archival or primary sources for research,
- instruction on how to locate archival and other primary sources at SSU and beyond,
- overviews of subject specific collections and related resources, and
- explorations of an array of unique materials within our collections.

Ideally, visiting classes have time to spend with collection materials. Although handling is limited with fragile materials, a goal is to provide a hands-on experience for students.³

However, in the wake of a global pandemic, librarians were unable to provide the same personalized, face-to-face instruction to which we had become accustomed. Instructors wanted their students to have a hands-on experience with rare materials in order to provide a historical and cultural context for topics, but, similar to many universities, SSU had transitioned to remote learning. Librarians were, at first, at a loss on how to fulfill these requests with limited people and expertise. This case study demonstrates a solution for transitioning in-person special collections instruction into an online format and delivering such instruction to multiple instructors teaching remotely. It details the development of lesson plans and learning activities, the process of selecting a digital teaching collection, and methods for supporting students' discovery and use of primary source materials for a culminating project. Additionally, this case study reveals how some primary source literacy objectives might be more easily taught and demonstrated in online environments than others. We hope that the development, results, and lessons learned are formative for instructors considering methods for transitioning their primary source teaching to virtual formats.

¹ Sonoma State University Office of Reporting and Analytics, "Total Student Enrollment," Sonoma State University, last modified January 17, 2020, <https://ra.sonoma.edu/quick-facts/total-student-enrollment>.

² Sonoma State University Library, "Collections," Sonoma State University, last modified July 20, 2020, <http://library.sonoma.edu/collections>.

³ Sonoma State University Library, "Teaching with Special Collections," Sonoma State University, last modified May 9, 2018, <http://library.sonoma.edu/specialcollections/teaching>.

Narrative

In Fall 2014, the School of Arts and Humanities at Sonoma State launched a new, innovative program designed for second-year students to explore topics in the arts and humanities through a “time machine.” Throughout their semester, students in the Second Year Research and Creative Experience (SYRCE) program attend a series of lectures delivered by instructors from many disciplines such as American multicultural studies, art history, communication and media studies, dance, literature, music, theater, and philosophy. They also attend weekly seminars in which they debrief given lectures and explore discipline-specific material. The semester culminates in a symposium in which students present a creative project (this can be a presentation, film, artwork, film piece, etc.) informed by lectures, seminar classes, and personal research.⁴ Accompanying the creative project is an annotated bibliography where students cite the primary and secondary sources they used to create their project. Annotations, written in the students’ own words, summarize each source and describe how the source informed their research. The program has seven to twelve classes and serves about 250 students in any given semester. The program’s goals are to foster collaboration, creativity, research, modeling, and mentoring among students and faculty in pursuit of new understandings and interpretations of history and historical events.

When developed, SYRCE incorporated special collections instruction through one 50-minute course-integrated instruction. However, as the program grew, so did library involvement. In 2018, the library embedded a librarian in the program. That librarian would provide two to three lectures and two to three library workshops on finding, evaluating, and using primary sources for each class. Because each class focused on a different discipline, library instruction was highly customized, with the embedded librarian pulling collections for each discipline. In 2019, prior to the semester, the special collections librarian and instruction coordinator met and identified four learning objectives from the *Guidelines for Primary Source Literacy*⁵ that they hoped students in the SYRCE program would demonstrate in their final creative projects. These objectives were:

- 1.B. Articulate what might serve as primary sources for a specific research project within the framework of an academic discipline or area of study.
- 3.B. Identify and communicate information found in primary sources, including summarizing the content of the source and identifying and reporting key components such as how it was created, by whom, when, and what it is.
- 4.F. Demonstrate historical empathy, curiosity about the past, and appreciation for historical sources and historical actors.
- 5.A. Examine and synthesize a variety of sources in order to construct, support, or dispute a research argument.

⁴ Sonoma State University School of Arts & Humanities, “School of Arts & Humanities Second Year Research and Creative Experience,” Sonoma State University, last modified December 4, 2019, <https://ah.sonoma.edu/syrce>.

⁵ *Guidelines for Primary Source Literacy* (Society of American Archivists and Association of College and Research Libraries’ Rare Books and Manuscripts Section, 2018), <https://www2.archivists.org/sites/all/files/GuidelinesForPrimarySourceLiteracy-June2018.pdf>.

These learning objectives were then mapped on to ways in which students would be introduced to the ideas, practice these skills, and demonstrate their proficiency. These are outlined in Table 1.

Table 1: Curriculum Map for Primary Source Objectives in SYRCE

	Objective 1.B.	Objective 3.B.	Objective 4.F.	Objective 5.A.
Librarian Lecture 1: What is Research?	Introduced			
Librarian Lecture 2: What are Primary Sources?		Introduced	Introduced	
Librarian Lecture 3: Research as Creative Expression				Introduced
Library Workshop 1: Discovery Lab	Practiced			
Library Workshop 2: Deep Dive		Practiced		
Library Workshop 3: Annotated Bibliographies				Practiced
Student Assignment 1: Creative Product			Demonstrated	Demonstrated
Student Assignment 2: Annotated Bibliography	Demonstrated	Demonstrated		Demonstrated

All students would be introduced to objectives through three lectures delivered by a librarian and would demonstrate their achievement of the objectives through two required final assignments. They would also have an opportunity to practice the objectives through research workshops, organized by request of the instructor. The workshops were not, and have never been, a mandatory part of the SYRCE program.

Lecture content presented a personal narrative of the librarian’s research experience to define, demystify, and illuminate what it means to do archival research. Delivered as a three-part series, the lectures introduced primary source literacy objectives to students as they begin the process of exploring, identifying, and synthesizing primary source material. Librarian-led workshops built upon lecture content by leading students through directed practices of discovering topics, diving deeply into primary resources, and constructing an annotated bibliography. In their final projects, all students produced both a creative expression of a historical topic, as well as an annotated bibliography, as described in the opening of the narrative.

However, when the viral outbreak of COVID-19 in March led a shift to remote teaching, the librarian embedded in the course worked quickly to forge a new path forward to support students’ success in the SYRCE program and help instructors of the program teach primary source literacy. Since all three librarian lectures had been delivered in the first half of the semester, the focus was on adapting the workshops to be taught online. First, they identified a small digital special collection that could be used for online teaching. They chose SSU’s university archives, which preserves material produced by Sonoma State University and its constituent parts. The collection contains print, graphic, and media records that document the history, growth, and development of the university and support its institutional memory.⁶ It was selected both for its diverse online content and because the collection allowed for connections across disciplines: no matter what the student was studying, they could find materials related to their subject or collegiate experience.

Then, they worked to build online content for instructors’ remote instruction. The final online content had three modules that replaced the three previously planned library workshops. The modules are as follows:

➤ **Module 1: Defining a Primary Source**

In this section, students learned to tell the difference between primary and secondary sources using UCLA WI+RE’s digital tutorial, “Wheel of Sources.”⁷ This tutorial was chosen due to the engaging, interactive design and because it defines a primary source as relative to the researcher’s topic, providing multiple examples in different disciplines. In addition, the tutorial efficiently reiterates an introduction to objective 1.B. from *Guidelines for Primary Source Literacy* that was first provided via the initial librarian lecture, “What is Research,” and which prepared students to demonstrate the objective throughout their subsequent activities and assignments.

After playing “Wheel of Sources,” students were asked in a discussion post to brainstorm at least three primary sources they hoped to find related to their topic. This discussion was consciously designed to give students an opportunity to consider how they might demonstrate objective 1.B.,

⁶ Sonoma State University Library, “Sonoma State University Archives,” Sonoma State University, last modified January 30, 2020, <https://library.sonoma.edu/specialcollections/collections/sonoma-state-university-archives>.

⁷ Kian Ravaei and Jennifer Pierre, “Wheel of Sources: Primary and Secondary Sources,” MERLOT, January 24, 2019, last modified May 13, 2020, <https://www.merlot.org/merlot/viewMaterial.htm?id=1379183>.

because they would “articulate what might serve as primary sources for a specific research project. . . .” Librarians and instructors then used the students’ discussion posts to assess how effectively the librarians’ lecture and “Wheel of Sources” introduced the objective.

The design for this module was a digital translation of the first portion of Library Workshop 1: Discovery Lab. Within the first portion of the previous design for an in-person workshop, librarians opened with a discussion on what makes a source “primary,” sometimes using the “Wheel of Sources” tutorial. They then led a brainstorming activity with students considering what kind of primary sources they might want to find to inform their research topics.

➤ **Module 2: Exploring and Engaging with University Archives**

In this section, students were directed to the university archives’ digital collections. They were asked to find one source that looked interesting to them and, in a discussion post, share their archival source with their classmates by responding to the questions:

- *What is the thing (what type of material is it, who wrote it, when was it created)?* Summarize the contents of the thing for your classmates. Please include a link to the source you chose.
- *Why do you think the library thought this thing was worthy of preserving?* Describe why you think the thing is important for future generations to see.
- *Did you learn anything new from the thing you investigated? If so, what?*
- *Did the thing you looked at bring forth any new questions about your university? If so, what?*

This activity was designed to help students practice objective 3.B. from the *Guidelines*, a concept originally introduced during Librarian Lecture 2. In responding to the discussion prompts, students were required to “identify and communicate information found in primary sources, including summarizing the content of the source and identifying and reporting key components such as how it was created, by whom, and when, and what it is.” Their practice prepared them more fully for a demonstration of objective 3.B. in their annotated bibliography assignment. In addition, the activity provided an opportunity for librarians and instructors to witness student demonstration of objective 4.F., which students had been introduced to in Librarian Lecture 2. By asking students to consider why they thought the archival item was worthy of preserving, they saw students’ “historical empathy, curiosity about the past, and appreciation for historical sources and historical actors.”

This module provided a digital translation of part two of Library Workshop 1: Discovery Lab. For the in-person version of the workshop, after the librarian provided a lecture on what makes a primary source and led a brainstorming activity on ideal primary sources, they would invite students to “discover” items from the library’s Special Collections. At the end of the session, groups of students would present one archival item they found interesting to the rest of their classmates. When the workshop was held in-person, items for “discovery” were identified based on the sections’ discipline. However, as previously mentioned, the embedded librarian chose to direct students to

“discover” materials in the university archives due to the collections’ online availability as well as it’s cross-disciplinary appeal.

➤ **Module 3: Searching for Primary Sources**

In the final module, students were directed to find at least two primary sources related to their research topic. Once they had found the sources, they were to reply to their original brainstorm post (see Module 1) listing their found sources and how those sources were similar or different from their original expectations. Within the assignment to find primary sources, students learned how to find sources related to their topic by following the guidance provided:

- *On the web, search for and identify an archival or special collection related to your topic in a library or museum.* This could be materials related to a specific artist, a collection in a museum, or something else! Record the name of the collection, where it is housed, and if they have any materials online that you might be able to use.
- *Using the [Research Guide](#),⁸ browse the places provided to look for primary sources.* Navigate to the “Primary Source Portals” tab or browse resources by type. Explore the resources listed to find a digital primary source that you can use for your project. Once you find something, record the name of the source, where you found it, and any additional citation information.
- *Talk to your librarian.* I am available via email, phone, or virtual appointment to help you find resources related to your project. Reach out to me if you're having trouble identifying sources to use or need some assistance in finding the right source.

The module was designed so that students would be able to demonstrate objective 1.B. and practice objective 5.A. from the *Guidelines*. By finding, describing, and analyzing primary sources related to their research topics, students would again “articulate what might serve as primary sources for a specific research project within the framework of an academic discipline or area of study” (objective 1.B.), while taking the first steps toward examining and synthesizing “a variety of sources in order to construct, support, or dispute a research argument” (objective 5.A.), which they had been introduced to in Librarian Lecture 3 and would be required to demonstrate in their final creative assignment and annotated bibliography.

Module 3 was a digital translation of Library Workshop 2: Deep Dive. When the workshop was taught face-to-face, the librarian opened the class by providing instruction on methods and strategies for finding primary source material related to a research topic. Then, students were provided with time to search both library resources and the open web. During students’ search time, the librarian provided one-on-one research assistance. The desired outcome of the in-person workshop was that each student leaves with at least one primary source to inform both of their final assignments: the creative assignment and annotated bibliography.

⁸ Kaitlin Springmier, “How Do I Find Primary Sources?,” Sonoma State University Library, last modified June 12, 2020, <https://libguides.sonoma.edu/primary>.

It is important to note that Library Workshop 3: Annotated Bibliographies has not been included in the transition to online teaching. In this workshop, a librarian leads a lecture defining annotated bibliographies and their components. After clearly defining both citations and annotations, the librarian distributes an example of an annotated bibliography, which the class collectively assesses based on their shared knowledge of what makes a “good” annotated bibliography. The workshop is formative for students and the instructor to come to a common understanding on what the essential criteria are for an annotated bibliography and how students can succeed in their assignment. Because this workshop did not directly address the selected objectives, and given the time needed to translate library workshops to digital content, this workshop was not adapted into a module.

Part of the in-person SYRCE program is a culminating symposium, in which all students who had enrolled in SYRCE courses present their final assignments: the creative project and annotated bibliography. During this symposium, the librarian would usually have an opportunity to assess students’ demonstration of all selected objectives: how students selected and described primary sources in their annotated bibliography, synthesized primary and secondary source material to support a research argument, and demonstrate an appreciation for the past through their creative project. However, because the campus had moved online, the program found a new way for students to present their final assignments: a digital symposium.⁹ Students uploaded their creative projects and an accompanying narrative describing the project, their sources, and what they had learned, all of which the librarian used to measure student demonstration of the objectives.

As noted throughout this narrative, when transitioning the library workshops to digital modules, the ways in which students practiced or demonstrated primary source literacy objectives changed. Table 2 compares how workshops and modules addressed selected objectives for primary source literacy; mapping of these objectives to librarian lectures and student assignments remained the same as in Table 1.

⁹ Sonoma State University Office of Research and Sponsored Programs, “Welcome to the Sonoma State University Virtual Research Gallery,” Sonoma State University, last modified May 7, 2020, <https://orsp.sonoma.edu/training-and-events/gallery>.

Table 2: Curriculum Map for Primary Source Objectives in SYRCE Face-to-Face vs. Remote Instruction

	Objective 1.B.	Objective 3.B.	Objective 4.F.	Objective 5.A.
Library Workshop 1: Discovery Lab	Practiced			
Library Workshop 2: Deep Dive		Practiced		
Library Workshop 3: Annotated Bibliographies				Practiced
Library Module 1: Defining a Primary Source	Practiced / Demonstrated			
Library Module 2: Exploring and Engaging with University Archives		Practiced / Demonstrated	Practiced / Demonstrated	
Library Module 3: Searching for Primary Sources	Demonstrated			Practiced

The modules provided new opportunities for students to practice and for librarians and instructors to witness demonstrations of all identified objectives.

Results

The library modules were embedded in three of the seven sections of the program in spring 2020. Student participation in the modules was inconsistent across the three sections. This inconsistency could be for many reasons: instructor implementation, student incentive, or external circumstances. As an instructor in the program stated, “Admittedly, students were a little overwhelmed in the second half of the semester and weren’t taking full advantage of opportunities and resources that they would otherwise have used had we been on campus.”¹⁰ We also notice that the timing of when the modules were incorporated seemed to influence students’ participation. Some sections incorporated the modules in the first week that the university transitioned to remote environments, while others waited until the fourth week of remote learning to deliver the modules. Finally, some instructors graded students’ participation in the modules, while others did not. The course that experienced the highest

¹⁰ Marc Evans (lecturer faculty, Sonoma State University), email message to author, July 15, 2020.

level of participation in modules delivered them later, after students had time to adjust to online learning, and graded students' participation.

The students who did participate in the modules defined, discovered, and engaged with primary sources from the library's Special Collections and online digital archives. As a SYRCE instructor mentioned, "by all accounts, students responded well to [the modules]. . . . I received strong responses to the online assignments that went with the tutorials."¹¹ Students' posts in the discussion boards demonstrated all selected objectives, with the exception of objective 5.A. However, some objectives were demonstrated less often or not as clearly as others. For example, students clearly demonstrated objective 1.B. through brainstorming types of primary sources that they hoped to find, and later, through reporting on primary sources they had found. Students identified many different types of sources, including photos, artworks, music, film, and news articles, and in many circumstances, the types of sources they had identified were relevant to their section's discipline. Many students in the art history section reported wanting to find artworks from the era that they were studying. Students also clearly demonstrated objective 3.B. by reporting on both the items they had "discovered" in the university archives and the items they had found through their independent search. In their discussion posts, they described the material, as well as how it was interesting to them and/or relevant for their research.

It was much more difficult to identify students' demonstrations of objectives 4.F. and 5.A. within the modules. Frequently, students demonstrated the objective in responding to the prompts provided when they explored the library's university archives online because, in their responses, they were asked to determine why an archivist might preserve the thing and also to consider how that thing stimulated their curiosity. Students' responses to these questions were varied: some clearly demonstrated historical empathy, appreciation, and curiosity for historical sources (objective 4.F.), while others did not (e.g. "This thing was worth preserving because it was an important event in history; I am pretty knowledgeable about this subject, so I have no further questions"). In addition, the module discussions did not provide an explicit opportunity for students to demonstrate a synthesis of a variety of sources to support their research argument (objective 5.A.). Very rarely, students would comment on how the primary sources they found informed their research argument. Overall, librarians and instructors drew a clear correlation between students who had found primary sources in the university archives that related to their final research question and responses that more clearly addressed all identified objectives.

While students' competency of 4.F. and 5.A. was difficult to assess in the remote instruction modules, it was expressly evident in their final creative project submissions. Even in the unprecedented circumstances of a global pandemic, students in the program developed interesting, engaging, and diverse products that demonstrated historical empathy and synthesized a collection of primary sources for their research argument. For example, in "La Ofrenda Para La Causa"¹² Jacqueline Garcia paid tribute to major organizations involved in El Movimiento, the Chicano civil rights movement of the 1960s and

¹¹ Evans, email message to author, July 15, 2020.

¹² Jacqueline Garcia, "La Ofrenda Para La Causa," May 4, 2020, <https://orsp.sonoma.edu/training-and-events/gallery/la-ofrenda-para-la-causa>.

1970s, pulling together images of protest movements, major organizations and leaders, and symbols of Chicana identity during the era.

Lessons Learned

This case study presents an example of how one institution transformed its in-person primary source instruction into a digital format. In creating three modules that instructors could import into their online courses, the library's capacity for delivering primary source instruction expanded. While the digital instruction would not have been developed had there not been extreme circumstances, overall, what was developed and implemented was successful in achieving identified primary source objectives. Surprisingly, in remote instruction, it became easier to measure student demonstration of some objectives, particularly 1.B. and 3.B., because the digital nature of these modules asked each student to write and post a demonstration of the objectives. Previously, these objectives were assessed through classroom discussion and observation.

The librarian identified two things that might improve future iterations:

1. Provide recommendations for instructors on how to implement the modules to maximize student engagement.

As noted in the results, students' participation was inconsistent across sections that implemented the library modules. Inconsistencies were attributed to the unique circumstances of the situation, as well as when and how the instructor assigned the modules. In the future, when offering online primary source instruction, we will be sure to recommend that instructors assign a portion of the students' grade toward participation in the modules and that they assign these when they are most appropriate for students' online learning.

2. Include instruction on identifying primary source material for students' research projects.

In reviewing students' discussion posts on primary sources that they had found for their research topics (module 3), it became clear that although students were extremely adept at identifying and communicating information found in primary sources, they sometimes struggled to find the original publisher and owner of the source. For example, a group of students investigated media coverage of the Zodiac Killer. In the final section of the module, when they were directed to search and post about primary sources related to their topic, they reported on a blog post they had found discussing an article published in the *Los Angeles Times* in 1969. While the post contained a primary source, their attribution was for the blog—not the article. Many students found web content that contained primary sources but did not take the additional step to find and cite the original publisher of the source. Providing this type of nuanced instruction can be difficult in online environments. In the future, we hope to build instruction on how to find and correctly cite primary source material.

We hope to continue to use these modules in future classes, even when our institution allows face-to-face instruction to continue. This case study presents how face-to-face teaching was rapidly transitioned to an online environment, as well as how primary source literacy objectives can be addressed in digital instruction. The modules expand our Special Collections instruction capacity: providing a digital version eliminates concerns for space, scheduling, and librarian time. Remote teaching can never fully replace the experience of visiting a library's Special Collections and the nuance that accompanies interacting with primary source content, but developing a digital supplement allows this library to teach and assess primary source literacy in greater numbers.