TEACHING WITH PRIMARY SOURCES:

REPORT FROM TEXAS A&M UNIVERSITY FOR ITHAKA S+R

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EXECUTIVE SUMMARY

Primary sources have long enabled an inquiry-based approach to instruction, one which offers students the opportunity to expand critical thinking abilities and lasting research skills through a personal experience with historical materials. In recent years, this mode of teaching has greatly been expanded through the aid of digital technologies and an increased commitment to fostering information literacy among undergraduate students in particular. The present report reflects research conducted by a team of three librarians at Texas A&M University as part of the Ithaka S+R "Teaching With Primary Sources" research project.

The team distilled the data reported by our respondents and grouped them under three thematic research questions:

1. *What primary sources do our instructors utilize in their instruction?*

2. *Where and how are instructors using them to enhance their teaching?*

3. *What can we in the Libraries do to better serve this clearly vital mode of instruction?*

As the more detailed report will show, instructors from multiple colleges frequently use primary sources to enrich their classroom instruction. The format and content of the sources selected or resources used depends largely upon the subject matter and the course design. Although primary sources are generally defined as those created at the time of the events under investigation, a source need not be "old" to be considered "primary." Similarly, the primary sources utilized in undergraduate teaching are as likely to be owned by the Libraries as they are

to be hosted remotely, and come in a wide variety of formats including ephemera in archives, microfilm, and digital surrogates.

Without exception, the respondents commented upon the utmost importance of giving undergraduate students the opportunity to engage with some type of primary sources during their coursework. Doing so promotes greater critical thinking, exposes students to a broader and more diverse array of viewpoints, reinforces ethical scholarly research practices, and engenders a greater sense of social responsibility on the part of the students. It was acknowledged, however, that facilitating such encounters with primary source material requires a significant investment of time spent planning, not to mention class hours instructing, to be successful. Therefore, such opportunities tend to be reserved for smaller, upper-division research seminars.

Besides the complex logistics of incorporating primary sources into classroom instruction, the sources themselves come with an added level of difficulty many students find challenging. Most fundamentally, many students do not possess the necessary skills to identify, select, assess, and incorporate reliable primary sources into crafting an original argument. As more primary sources are utilized online, students do not have the information-literacy abilities needed to adequately critique the quality and veracity of the digital materials they discover. Technological barriers also exist for the instructors themselves, particularly as more instruction moves online. One of the more taxing problems involves access to materials, leading librarians to ask: How can we develop the same high-quality, immersive interactions with primary sources for remote students as those offered in the classroom or a visit to special collections?

With each of these challenges, however, comes an opportunity. We have prepared five recommendations for how the Libraries can continue to support this vital instruction: in the future:

1. Offer informational opportunities to increase awareness among new faculty and graduate student instructors about resources available through the Libraries to facilitate teaching with primary sources.

2. Develop resources to instruct students on digital primary source literacy and the unique challenges and opportunities involved in digital research.

3. Increase activities that support the digital delivery of our institution's unique materials, including the cataloguing, contextualization, and digitization of special collections items.

4. Adopt a patron-driven model in managing primary source collections, and be mindful of the strengths and weaknesses of sources' format in making collection management decisions.

5. Increase efforts to build relationships between instructors and their subject liaisons and curators.

PROJECT BACKGROUND[1]

Academic libraries are important partners in supporting higher education's mandate to teach effectively and dynamically with primary source materials. This mandate has been bolstered by technological advancements which open up new possibilities for teaching with primary source content, including how those sources are discovered, shared and annotated. The explosion in digital content has also expanded the definition of what a primary source is and how it can be used as a form of evidence.

The present report has been prepared as part of a large-scale research project initiated by Ithaka S+R in partnership with academic libraries to examine the teaching support needs of instructors working with primary sources at the undergraduate level. Constituents from each partner institution interviewed 12-15 instructors on their campus and synthesized their findings in a local report. Upon reviewing the reports, Ithaka S+R will then draw from all of the resulting aggregated data to prepare their own project report, which will subsequently be made publicly available.

Partner institutions for this project included Bowling Green State University, Brandeis University, Brigham Young University, Brown University, California State University Northridge, Dartmouth College, Illinois Wesleyan University, Indiana University Bloomington, Johns Hopkins University, Lafayette College, Northern Michigan University, Pennsylvania State University, Princeton University, Texas A&M University, University of Arizona, University of Illinois Urbana-Champaign, University of Kentucky, University of Miami, University of North

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[1] Adapted from the Ithaka S+R "Teaching Support Services: Primary Sources" prospectus.

Carolina Chapel Hill, University of Pittsburgh, University of Sheffield, University of Southampton, University of Virginia, Washington and Lee University, Williams College, and Yale University.

RESPONDENT BACKGROUND

Investigators attempted to capture a wide range of experience and perspectives related to teaching with primary sources by inviting participation from instructors at different academic ranks from multiple departments and colleges. The demographics were as follows:

Academic Rank
- Distinguished Professor (1)
- Professor (7)
- Associate Professor (3)
- Assistant Professor (1)
- Instructional Assistant Professor (1)
- Lecturer (1)

Departmental Affiliation
- History (6)
- English (4)
- Visualization (2)
- Hispanic Studies (1)
- Performance Studies (1)

METHODOLOGY

The researchers made initial contact with potential respondents via email. Fourteen faculty members accepted the invitation to interview with one of the researchers. The one-on-one, semi-structured interviews (see Appendix for a copy of the interview guide used for this study) between the researcher and faculty member were conducted in a private office setting. Audio recordings were made from each interview for later analysis. Interviews ranged from 30 minutes to one hour. A question guide was provided by Ithaka S+R to focus the interview sessions on exploring each faculty member's experience using primary sources in their instruction. Faculty were asked to share a syllabus that cited primary source use in their curriculum. The identification of courses involving primary sources expanded the line of questioning with each participant and gave a concrete example of usage in their courses. This research study was approved through Texas A&M University's IRB (Institutional Review Board).

For the purposes of this project, ITHAKA S+R defines "primary sources" as: "historical or contemporary artifacts which are direct witnesses to a period, event, person/group, or phenomenon, and which are typically used as evidence in humanities and some social science research." ITHAKA S+R identified a variety of formats in which primary sources might appear including, but not limited to, physical objects, printed copies, digital surrogates and scans of original materials, photo reproductions, and oral histories (as video, audio, and/or printed

transcript).[2] Additional formats may include: manuscripts and ephemera, and micro-forms (including microfilm, microfiche, and micro-cards).

DATA ANALYSIS

Once interviews were completed, recordings were transcribed by a third-party vendor. The researchers used qualitative coding and grounded theory to manually code the interview documents for overarching themes.[3] Each researcher performed an independent initial coding of the 14 documents, then discussed major themes discovered through this process with the other investigators.

Three overarching themes were agreed upon:

1. Essential qualities of primary sources utilized by respondents

2. The manner in which these primary sources were employed by respondents in their courses.

3. The challenges they encountered in doing so.

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[2] ITHAKA S+R, *Implementation Guide: Supporting Teaching with Primary Sources*, 6.
[3] See Juliet Strauss and Anton Corbin, *Basics of Qualitative Research: Techniques and Procedures for Developing Grounded Theory* (Los Angeles, CA: Sage Publications, Inc., 2014).

CHARACTERISTICS OF PRIMARY SOURCES

SUMMARY: Characteristics of Primary Sources captures the comments from faculty that describes the importance of sources, as well as the location of sources, such as databases, archives, online or physical formats. This theme also takes into account how faculty discovered primary sources for use in their research and/or curriculum.

- Primary Sources take on three important functions for the faculty that use them: Source as Artifact, Source as Evidence, and Source as Method.

- Primary Sources come in a wide variety of formats from ephemera in archives, to microfilm, to digital surrogates. A source need not be "old" to be considered "primary."

- Libraries, including archives and special collections, are the most common repositories for these necessary and specialized resources. As such, a close working relationship between teaching faculty and librarians can facilitate integrating Primary Sources into the curriculum.

Primary sources are *sine qua non* for scholarly research and teaching in multiple disciplines, but particularly those falling under the broad heading of "liberal arts." Historians, anthropologists, archaeologists, philosophers, economists, sociologists, and scholars of literature, film, and popular culture are just some of the specialists whose work depends on primary sources. There really is no "one-size-fits-all" definition of "primary sources," in terms of format or even age of the materials. Most scholars who utilize primary sources in their research and teaching will be looking for resources created as closely as possible to the events being investigated by people who were directly involved in the events or were eyewitnesses. Therefore, one scholar's sources may be hundreds of years old, while another scholar in the same department may be interested in materials created only in the most recent two decades. This

disparity can create some confusion at a library's public service desk (or virtual reference system) when students show up asking for help locating "primary sources." Similarly, digital images (or surrogates) of books originally printed in the 17th-century are frequently acceptable as "primary sources," although this is entirely dependent upon the nature of the project, and a detailed investigation of the physical characteristics of 17th-century printed materials generally requires the scholar to closely examine the originals.

Primary sources fill three distinct but interconnected functions within the disciplines that require their use. One of the faculty interviewed for this project summarized these functions as: Source as Artifact; Source as Evidence; and Source as Method. Looking at primary sources within this context explains the importance for faculty who use them. As we consider these functions, we must keep in mind that what defines a source as "primary" is very much dependent upon the parameters of each individual research project. A related concern is to the extent that format (digital, print, ephemera, microfilm) may affect the resource to be used. In a number of instances, instructors reported digital surrogates being satisfactory for pedagogical purposes. Nevertheless, as one instructor observed when she brought her students into the rare books repository on campus where they could interact in person with the actual rare books, "their eyes get big." More than one of the faculty interviewed recalled those special moments either in their own experience, or watching their students, as being especially inspirational.

Primary sources as artifacts may be thought of as the products that were created during a particular historical moment. This artifact might be a three-dimensional object such as a cannonball as reported in one interview; but "artifact" could also include written materials including diaries or correspondence, as one professor described using a digital image of a letter

drafted by Tennessee's first governor relating to whites encroaching on land belonging to the Cherokee. Using artifacts helps students situate their project within a specific moment in time. Primary sources, or more specifically the information contained therein, additionally are the evidence to discuss and debate a given topic, such as the professor who selected transcripts of documents from the immediate, post-Civil War period regarding the impeachment trial of US President Andrew Johnson. Her students use the documents she has selected for their discussions relating to this pivotal time in American history. Finally, primary sources are an integral part of the methodologies that define the disciplines requiring their use. A literary scholar interviewed for this project described using Early English Books Online (EEBO) to show students a specific play written by Early Modern British playwright Aphra Behn, since "no modern edition" of her play, *The Forced Marriage*, exists. When faculty teach undergraduate students, they not only teach their subject specialty, they also teach the methodologies of their discipline, whether it is engineering or history. For the faculty interviewed for this project, that methodology requires finding, evaluating, and using primary sources.

LOCATIONS: ONLINE, ARCHIVES, PERSONAL COLLECTIONS, ET AL.

The interviewed faculty reported a wide variety of locations where they found the primary sources used for class assignments, which reflects the many different types of materials considered "primary," course designs, and pedagogical goals. "Locations" are understood to be either a physical location (e.g. special collections or rare books library), the faculty member's own personal collections (this could be subdivided into photocopies of originals, digital files of

scanned originals on a USB memory device, a rare book from the professor's personal collection, etc.), or materials found in an online environment.

One of the instructors interviewed described physically taking the class as a group to the section of the main library where the students searched for, examined, and checked out books considered primary for their projects. Additionally, more than one professor emphasized that class visits to TAMU's special collection and rare books library were especially useful, including one literary scholar who scheduled multiple visits for the students over the course of a single semester. There the students could touch, read, and interrogate the original materials. A couple of classes even got to experience printing with a working replica of an English common press, which in the words of one study participant, inspired "happiness" in the students who were thrilled as they worked with the composing sticks and metal type. In another example of utilizing sources from special collections and archives, a professor researching a relatively new and untouched topic gave his seminar class access to the digital scans of boxes of materials the repository had made for him. The class as a whole spent several days over the course of the semester methodically and systematically going through the [digitized] boxes, folders, and files of materials, discussing what they found and what questions remained unanswered. For an example of finding sources in the online environment, one professor described constructing an entire course around a commercially available database containing over 56,000 videotaped oral history testimonies of Holocaust survivors and concentration camp liberators.[4] Another instructor mentioned using the Avalon Project at Yale University's Lillian Goldman Law Library as an

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[4] This is the Shoah Foundation Visual History Archive housed at the University of Southern California. See: https://sfi.usc.edu/ . Accessed online May 8, 2020.

online source for primary documents.[5] Other professors reported drawing from their own archive or collection of primary sources, such as the professor who drew from her own collection of rare originals and brought to class books printed in the sixteenth-century by certain Spanish poets to illustrate some of the finer points they were trying to help the students grasp. Among the faculty interviewed for this project, a majority considered digital surrogates acceptable for classroom use except in rare cases when the original was both necessary for pedagogical reasons and available. Whether available via commercial databases, or scanned by the repository, electronic access to these resources were generally regarded as being better than no access.

SELECTION: HOW ARE PRIMARY SOURCES DISCOVERED AND CHOSEN?

The interviews revealed that the selection of primary sources was completely dependent on course design. "Selection," or the manner in which primary sources were discovered and chosen, must be broken into two subcategories: sources selected by the course instructor, and those sources selected by the student. In some cases, the instructors provided the sources they intended the students to use based on their own criteria. One example was a professor who divided the students in his course on the American Revolution into two groups and staged debates over thorny issues of the time, such as the definition of "freedom" in a society that permitted chattel slavery. The professor supplied students participating in the debates with primary sources he had purposefully selected and vetted to cover both sides of the issue. On the other hand, some professors gave the students the freedom to pick and choose whatever sources they could find with which to write a capstone research paper. While one professor joked his

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[5] See https://avalon.law.yale.edu/ . Accessed online May 8, 2020.

students were "out there in the jungle by themselves" in terms of tracking down usable primary sources, earlier in the semester he actually had brought the class into the library for a session with the subject specialist librarian that specifically discussed finding and selecting primary sources. However, because of the very different methods the instructors used to bring primary sources into the course design, not all students received this kind of instruction from a librarian.

Few faculty admitted to being willing to simply leave students to their own devices in the search for primary sources. More than one expressed concerns over the students' lack of experience in being able to discern quality material. Several stated unequivocally that the students were not coming into their classes prepared to analyze and select the best sources for their projects. This was the rationale some instructors gave for why they deliberately limited their students to using carefully selected sources which they provided for the students to use. One professor in particular recalled the "teachable moments" when students brought in sources about the Holocaust found through simple and uncritical web-searching that actually had been created to disseminate false information by an organization that denies the genocide occurred. Several respondents mentioned the importance of bringing librarians into the class, or the class into the library, for sessions on navigating library resources and finding primary sources. It does bear repeating that librarians do not always get to meet with each and every class that uses primary sources simply because of the variety of ways different faculty design their assignments. Some of the projects the instructors described for integrating primary sources into their classes were quite innovative, but left little room for a class session with the librarian. Conversely, the instructor who designed his course on the Holocaust around one massive collection of primary course material described the "really fruitful partnership" which has developed over several

years between himself and the librarian who meets with his students and assists them in utilizing the resource.

VARIETY AND FORMATS

Primary sources come in a wide variety of materials and formats. Any attempt at a definitive list would be incomplete since each research project and assignment defines the sources required. While this lack of a precise and consistent definition complicates libraries' need to catalog and classify, this kind of flexibility is necessary considering the variety of disciplines and methodologies employing primary sources, and the endless variety of potential research projects. While it is impractical (and potentially misleading) for item level catalog records to be marked as "primary sources," subject specialist librarians should consider annotating LibGuides, finding-, or subject guides, and other webpages to suggest or recommend databases, microfilm sets, newspaper titles, or other resources that have potential to be used as "primary."

The complex nature and wide variety of primary sources used in undergraduate courses was borne out by the interviews for this report. One professor interviewed for this project mentioned having a standing offer to meet any of her students who need assistance using the library's microfilm collection. While she admitted few students had taken up her offer in the most recent couple of years, she reported having worked with students in the past to engage primary sources using this still-relevant format. For one graphic-arts class, looking at old broadsides and how they were printed served as a primary source as they examined various

typefaces and how the press worked. Meanwhile, another class explored the electronic databases Early English Books Online (EEBO) and Eighteenth Century Collections Online (ECCO) to discern how later editions of a particular play could be different (textually as well as stage directions) from what the playwright originally published. Even more modern primary sources are needed for a course on the history of the space program. Primary sources used for this class have included oral histories of NASA astronauts, technical reports related to astronaut health while in space, and even science fiction novels and/or other media and the influences of art on real life and vice versa.

THE NATURE OF INSTRUCTION

SUMMARY: The overarching theme *Nature of Instruction* pertains to student learning outcomes, how primary sources were utilized in curriculum and instruction, and what was the effect on students - student response and the success of implementing primary sources.

- Undergraduate instruction using primary sources tends to take place in upper-level courses. As for why this is, respondents noted logistical difficulties in facilitating meaningful engagement using primary source material among large-section classes as well as differences in learning outcomes between the upper- and lower-level courses (e.g. exposure to a broad selection of literary texts in an English Literature survey versus the need to develop advanced research skills in a senior seminar).

- The three primary motivators for instructors to teach with primary sources are: providing key course readings; the instruction of advanced research methods; and the essential enrichment of the student as a citizen and scholar.

- As more teaching and research moves online, respondents expressed a significant level of comfort with regard to the use of digital assets in teaching with primary sources. However, this increased comfort with technological mediation has not been extended to online teaching of primary sources, of which several expressed significant reservation.

WHERE DOES TEACHING WITH PRIMARY SOURCES OCCUR?

Almost exclusively, the fourteen study participants noted that they regularly taught both lower-level survey classes as well as smaller, upper-level seminars. However, in general, primary sources were most frequently used in the latter. One instructor, whose classes were an exception to this rule, acknowledged that special accommodations, such as splitting the larger class into smaller sections, are necessary to facilitate hands-on research using physical collections. Another, however, noted the widespread availability of digital surrogates, which could be used to

great effect in supplementing regular course readings in even a large-format class. For the remaining instructors, the decision to deploy primary sources in the smaller settings typically reflected factors such as a greater investment of time needed to teach primary source literacy within the course and the specific learning outcomes and deliverables of the course (which were better supplied by the inclusion of primary sources in the curriculum).

While the course level at which teaching with primary sources occurred was relatively homogenous (being primarily small-section, upper-level classes), the instructors varied widely in how they incorporated both physical and online materials and how much intervention was expected on the part of the instructor or librarian. Some were careful to craft very controlled environments within which their students located and used primary sources, directing them to particular resources and guiding them in their use. By contrast, other instructors found it more productive to allow students to follow their own interests and inclinations, encouraging them to ask for assistance if/when serendipity did not provide.

WHY DO INSTRUCTORS TEACH WITH PRIMARY SOURCES?

Based upon the information provided by our fourteen respondents, there are three primary motivators driving instructors to engage librarians and curators in teaching with primary sources. These are: course materials; research methods; and essential enrichment.

Several instructors spoke to their reliance upon primary sources, whether they be in our special collections or available remotely, for the materials that would make up the core of their course. Doing so allows professors to draw upon rich traditions that exist outside the canon, material that is often missing, silenced, or heavily mediated. The incorporation of primary

sources is thus essential to the recovery and representation of marginalized perspectives in the classroom. Diversifying the curriculum in this way allows, as one respondent states, "people of the past to speak for themselves" and "brings the past alive for students to hear people speaking on their own behalf." This manner of instruction serves to create a powerful bond between the figures represented in these primary sources and today's students, who in the course of their work "really realize that these are complex human beings, that they're no less complex than human beings now." Such a bond is most possible when students establish direct contact with these voices from the past, free from editorial intervention, through the use of primary sources. Responses such as these reinforce the need for a hands-on approach that has come to be seen as mission critical for library-based instruction within special collections in particular. One respondent reported that the authors they wish to teach are not available elsewhere, having been forced out by the literary canonical hegemony. Or, in instances where such authors have been published, for example in an anthology, it is only with an incomplete version of a text. By relying upon primary sources, instructors are able to recover these lost voices and read them within the context of the period in which they were produced. By incorporating such assets into the course as class readings or material from which students may draw for creative projects or research papers, instructors can significantly embellish and diversify the texts that make up the core of their class. Such inclusion can initiate productive conversations around authority and authenticity in the production of scholarly editions, which lay the foundation for much undergraduate work. As one respondent noted when describing the use of digitized actors' prompt books for class texts: "Every version of *Hamlet* you read is a conflated edition. There's not actually an authoritative text of Hamlet to point to. … I want them to be thinking if we tear

down all those preëxisting structures of how to make a performance, and build it up from scratch, what does that look like?"

As an increasing number of institutions open their collections to a wider and more diverse population through the creation of robust digital libraries, there has never been a better time to teach with primary sources. Many respondents commented upon the wealth of high-quality digital surrogates that are now available online from cultural institutions the world over -- most with little or no access restrictions. Moreover, as one respondent noted, by incorporating digital assets, students are thus able to use material that otherwise would not be available to them, whether due to its location, physical condition, or historical significance. Several respondents reported upon the excitement that students feel when utilizing primary sources, that there is a sense of privilege and stature that comes with doing "real academic work." It is unsurprising, then, that a majority of our respondents chose to use primary sources toward the instruction of research methods within their courses.

It is not unusual for the course deliverables in an upper-level seminar course to culminate with a research product of significant depth, such as a final paper or creative assignment. In keeping with the fact that most of our respondents incorporate primary sources in upper-level courses, these materials are frequently used toward the instruction of research methods. Several respondents cited their use of primary sources in the classroom as a way to model the methodologies of an advanced researcher. This ranges from something as practical as learning how to cite archival sources to something as fundamental as learning how to select and vet potential sources. As one instructor noted, the earlier students are exposed to such practices the better. And as another respondent offered, introducing these skills in such an environment offers

them a safe place to make mistakes and learn from them before they graduate and go into the field. Finally, practicing these newly formed research skills with primary sources also gives students the opportunity to employ a deeper, more critical form of analytical thinking -- one that is more creative and self-reliant in drawing out facts to propose and support an original argument.

There was a persistent emphasis among respondents that such skills are also readily applicable to life beyond the academy, being as integral to the personal growth of our students as they are to their professional development. As one respondent stated,

> "One of the really important things that we ought to be teaching students is how to assess personal and social responsibility for their own lives, but also in the people that we're studying in the past, and to really think in a complex way about all this stuff that goes into the choices people make. … Showing how important these interpretations are and how they relate to changing values in different generations."

In other words, teaching with primary sources is not only done with an intention to train students about research methodologies, but also to fashion more responsible citizens -- a fact that places this pedagogy at the heart of our institutional mission. Among the key learning outcomes cited by instructors was the ability not only to construct an argument that is based upon verifiable facts, but to also apply the same level of scrutiny "to statements that are being made to the general public or on social media platforms or even in the news media and be able to ask, 'Where's the evidence for that?'" These skills that are so vital to successful academic research cultivate a deeper sense of awareness about the evidential quality of sources and the importance of transparency and thorough documentation when presenting an argument, no matter where it appears. Such an awareness teaches our students, as citizens, to expect that stories, narratives,

and arguments be supported by verifiable facts. As one respondent summed it up, "The evidentiary basis upon which we build historical argument is crucial--not only to the practice of history, but the practice of citizenship in the present day as well."

The ability to think independently and formulate new arguments can be thrilling to an undergraduate student, and many instructors hope that such an experience with primary sources will be as rewarding as it is enchanting. No matter what the intended learning outcome, however, any first-hand experience of primary sources has the potential to inspire. Several respondents reported passing around old documents brought from home or arranging a trip to special collections for no other reason than they thought it would enrich their students. As one instructor stated, "I think it's important that people hold these things...What I'm trying to do in a way is give a little bit of a sense of excitement, when you open something up and you have no idea what it's going to be like." There is what one respondent described as a "psychological benefit" to experiencing a primary source first-hand, noting that while technology has enhanced our capacity for research in certain sectors, it was no replacement for the personal experience of collections materials.

Other respondents noted that cultivating an appreciation for cultural artifacts is an important part of a well-rounded education: "It's supposed to force people to think more deeply and to react to material in a non-superficial way...I want them to see that this material is potentially relevant to them and also worth preserving." Several respondents spoke to the importance of a personal experience of the primary sources, which provided something altogether unique from students' other encounters in the classroom. Perhaps unsurprisingly, then, multiple instructors described such encounters with primary sources as "immersive," pointing to

the possibility of these experiences to be transformative in a student's academic training. As one respondent summarized, "I want them to have a very tangible experience...I want them to catch that bug. It's contagious, the passion for research is something that I want them to experience firsthand."

The benefits of having a personal experience of primary sources was a persistent theme among nearly all respondents. However, several also noted that it was not always feasible or within the particular scope of a course to include, for example, trips to special collections in their syllabus. Therefore, it was extremely common for instructors to use high-quality digital surrogates in their class. These they accumulated from databases such as Early English Books Online (EEBO), publicly available resources (such as institutional digital collections), or their own scholarly research.

Despite the seemingly high level of comfort with digital assets and digital research, a number of respondents expressed strong concern regarding the trend toward online education, particularly related to the limitations such pedagogy placed upon first-hand engagement with physical collections materials. One respondent described online education as "the main menace" of their field, adding, "It is just no substitute: You will never get that same rush as when you hold a rare book in your hands for the first time, and that's something that they aren't going to be able to experience in an online course." This emerged as an interesting tension within our data, given the pervasive reliance upon digital assets that is already present in primary source instruction. How this tension might be reconciled will be taken up further in the concluding section of this report.

CHALLENGES AND OPPORTUNITIES

SUMMARY: This theme included comments of successes and challenges in working with primary sources in their course curriculum, barriers to teaching with primary sources, and how faculty perceive the future of working with primary sources, i.e. in the current situation of a pandemic, increased online instruction, and the digital divide for students understanding a basic search versus more complex researching.

- Online primary resources are easily accessible, but may not provide the quantity or quality students need to complete a substantial search for their research or assignments. Instruction is needed to educate students on the suitability of primary resources.

- Primary sources provide early, first-hand accounts to help us better understand the connections the past has with the present. Faculty incorporating these materials into their undergraduate courses give students the opportunities to learn how to build evidence-based arguments grounded on sound research methodologies.

A number of the faculty interviewed described various challenges they, and/or their students, faced when trying to find and use primary sources. Some of the challenges were existential in nature, some challenges were more technical, while other challenges revealed shortcomings in educational processes:

TECHNICAL

The online environment has posed various challenges. Although many instructors have recently utilized digitized texts with great enthusiasm, there are notable shortcomings inherent in teaching exclusively with digital surrogates of primary source material. Among them, such resources can be expensive for libraries to license; the texts are not always complete in their

surrogate forms; and relying too heavily on materials that have been digitized may neglect the still-relevant large body of sources that remain only in analog form. Although faculty perceive students are adept at the internet, they falter when doing meaningful searches for research such as primary and secondary sources. The infamous Google Search and relying on Wikipedia, can cloud their understanding of deep database or library catalog searching. Assistance with searching and locating primary sources is very much needed for students as they struggle to locate primary source material on their own. Although Google is a gateway to many online and digitized archives, students must be educated to locate and discover these materials.

Challenges and Opportunities covered a wide-range of difficulties including problems with the creation of the source as well as issues with the interfaces of commercial primary source databases. One professor observed that tape recorded oral histories sometimes had issues with poor sound quality (they did not specify whether the problem was from the magnetic tape deteriorating over time, or whether the original tape recording was poorly done). Another respondent complained about the number of different and proprietary search interfaces that primary source database vendors used. Because of the wide variety of interfaces, different commands for truncation or limiters, et al., crafting a sophisticated and effective search can be frustrating even for seasoned researchers.

Online learning modules, provided by universities, have been essential to provide students with materials online in a classroom setting. The ability to digitize or create digital copies and place in an online environment, will be crucial as we move forward with more online instruction. Faculty optimistically acknowledge that using primary sources in the classroom can be difficult, and one might learn as they go, but agree the benefits outweigh the risks.

EDUCATIONAL

Several faculty said student comprehension was a barrier, which made it more difficult to utilize primary sources in their classrooms. Students, especially undergraduates, do not understand what constitutes a primary source. They struggle to identify primary source materials on their own, whether in the archives or online. Locating primary sources can be difficult as some students have never stepped foot in a library or archives and as one respondent commented lack the basic understanding of how library call numbers or subject headings work to their benefit. Students need help finding books in the open stacks, which makes locating primary sources much more difficult. Faculty have adjusted their course syllabus to account for this, and have scanned, collected, or provided primary sources materials for students to review.

One significant stumbling block in using primary sources for teaching undergraduate students appears to be the language barrier. Professors and even graduate students are frequently expected to have a reading knowledge of at least one foreign language related to their research. Usually this is represented by a modern foreign language such as Spanish or German, but for some, knowledge of ancient languages such as Latin may be required. The majority of undergraduate students will not have this level of language competence, and this makes incorporating foreign-language primary source materials especially challenging. Additionally, more than one faculty member interviewed for this project reported students having difficulties reading English-language primary sources printed using archaic characters (e.g. the "long S"), earlier versions of the English language, or even manuscript sources written in cursive handwriting. Nonetheless, libraries' ability to incorporate this level of instruction is limited.

Other faculty complaints centered on the perceived superficial research habits of the students, and included comments on how Google has "devalued the craft of research," or that the students were "too conventional." In both of these examples, the students only utilized the top-ranked search results, but missed other compelling items which appeared lower in the list of results; the faculty had difficulty getting the students to see that digging a little deeper for more interesting evidence could improve their research project. Another respondent claimed digitization (through digital surrogates being used instead of manuscript originals) had made it impossible for students to distinguish the difference between "primary" and "secondary" sources. This instructor addressed an assumption among many faculty and librarians that the students, having come of age in the early digital era, are seasoned web searchers, when in point of fact, the students show a shocking degree of naivete regarding finding and evaluating the provenance and quality of online resources. Finally, two of the professors described the challenge of students encountering historical terms used for persons of color, or differing gender identities within the primary sources, which were commonly used in the past but are not considered appropriate to use now. These archaic terms can lead to discourse on how language changes across time and space and words commonly used back in the day are now considered pejorative.

Some of the faculty believed students had difficulties utilizing primary sources in their own research projects due to lack of understanding the research and writing process. Also, when using preselected primary sources in the classroom, faculty discovered shorter, more substantial selections from primary sources worked better than lengthy, broad ranging selections. Faculty likewise found more success by walking them through the structure, language, and perceived meaning of the primary source. This helped enhance the experience, and helped students

understand the quality and specificity of the material they came in contact with. This was an opportunity for faculty to highlight their expertise and deep knowledge of the primary source material.

CHALLENGES & OPPORTUNITIES IN SUMMARY

Students lack experience in libraries and archives, but this is an avenue for faculty to work with library specialists and archivists. Many faculty said they took their students to visit the library, campus archive, or a museum. This allowed information literacy instruction on primary sources from librarians and archivists. Often, this was the first time some students interacted with a librarian. Although faculty felt it was difficult to incorporate primary sources into their curriculum, all felt it was worth it. Some faculty developed assignments to allow willing and curious students to investigate primary sources as an extra credit project. This helped mitigate which students would complete such a project versus students uninterested in primary sources. Faculty noted, oftentimes, students exercise the minimum amount of effort for class assignments. Conversely, some faculty noted that bringing primary sources into the classroom clearly energized and engaged many students.

Although faculty face many challenges using primary sources in the classroom, there are many benefits to using these unique historical and sometimes obscure materials in class. Faculty acknowledged that primary sources can be an indispensable tool. Primary sources provide a historical documented event to help us understand the past. These materials help students build arguments based on historical evidence. Although some faculty noted difficulty in finding materials to meet the satisfaction of both sides of an argument, students could piece together voices of the past and create their own opinions.

Moving forward, faculty suggested to get feedback from students on what's working and what's not working. This may mean modification to a course, with curriculum adjusted to the students' capabilities. Although these interviews were conducted before the COVID-19 pandemic, faculty mentioned the difficulty of online teaching when using primary sources. They noted the ability to touch and hold rare materials served to increase the interest in and awareness of the delicacy of these materials. With online instruction, that physical approach is lost. Nonetheless, digitization of primary source materials has been a successful practice for many years, and allows faculty and students to access the voices of the past through their computer screens. As institutions of higher education move forward and consider what the "new normal" in a post-COVID19 pandemic world might look like, there will be an increased need for librarians to communicate with teaching faculty regarding what primary source materials are available and in which formats. While the health and safety of students, faculty, and staff are paramount, it does not take a great deal of imagination to conceive of situations where certain formats are better than others (such as an original in poor condition that prevents scanning, or the limitations imposed to prevent the spread of the coronavirus that makes virtual visits to special collections more palatable). In such circumstances, both faculty and librarians need to be flexible and exercise a willingness to move beyond comfort zones so that the impact on student experiences are lessened.

RECOMMENDATIONS

Incorporating primary sources into an undergraduate classroom can be challenging, and requires planning and careful consideration. Librarians must be aware that many of the disciplines that depend on primary sources look upon libraries as their laboratory. As such, it is crucial that we take these special needs into consideration when planning changes to collections policies and the management of collections themselves so as to minimize adverse effects, and maximize the potential use of materials and goodwill between librarians and faculty.

The following recommendations are suggested for continual use of primary sources in the classroom through library support.

LIBRARY INSTRUCTION

Libraries should consider offering workshops using a "Teach the Teacher" model, especially marketed toward graduate assistants, visiting assistant faculty, and other newly-hired faculty. These workshops would give instructors a better understanding of the types of resources the Libraries have available, as well as the type of instruction one can do with primary sources.

DIGITAL PRIMARY SOURCE LITERACY

We recommend investing in this area in an effort to alleviate the anxieties expressed by respondents regarding the experience of primary sources received through distance learning.

Doing so at a time when more and more instruction is forced online by the current COVID-19 health crisis seems particularly important.

DIGITIZATION

It is clear from our data that instructors see great benefit in using digitized or born-digital primary sources to enhance their curriculum. Sometimes the use of this content takes the place of an in-person trip to special collections. In such instances, instructors typically opt for digital content for one of two reasons: 1.) The materials they need are held by another institution, or 2.) They are unable to invest the class time to arrange an on-site visit to our campus's special collections. We recommend increasing activities that support the digital delivery of our institution's unique materials, including the cataloguing, contextualization, and digitization of special collections items. In much the way that our faculty seek out and make use of digital surrogates from other institutions, so too must we assume that others would seek out our materials online if such content were made accessible through the recently developed Digital Asset Management Ecosystem (DAME). Likewise, it is reasonable to presume that some of the same local faculty who turn elsewhere for online examples of primary sources will enjoy having these new resources available. Finally, instituting such a program would become an important mode of outreach for those underserved courses that would benefit from a trip to special collections, but are unable to make the trip in-person.

COLLECTION MANAGEMENT

Collection management is often thought of as curating print or physical materials. Some participants interviewed for this project stated they had good results by pre-selecting primary sources for their teaching, rather than expecting students to locate and assess primary source materials on their own. This inclination to pre-selection on the part of instructors can serve as a way for librarians to strategize the creation of more robust digital collections, but it will require closer collaboration between the teaching faculty and librarians. Digital collections of primary sources can offer a means to access items that might otherwise be inaccessible to patrons. In prioritizing which unique materials should be digitized and added to the Libraries' digital collections, we recommend librarians work closely with instructors engaged in teaching with primary sources.

Primary sources come in a wide gamut of formats, across hundreds of years, and represent practically all levels of technology from cuneiform on clay tablets to born-digital materials. Libraries must provide access to all materials within its collections, even when a given format is not the most user-friendly or preferred. Librarians must likewise be aware of the strengths and weaknesses of each format, and be mindful about specific digital resource's strengths and limitations before making permanent collections decisions, even if an individual library owns copies of a 1940s news magazine (e.g. *Time*, or *Saturday Evening Post*) as a series of bound volumes in the stacks, and as a set of microfilm, and as part of a full-text, online database package.[6]

RELATIONSHIP BUILDING

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[6] Kitchens, *Librarians*, 81-82.

When asked what advice they would offer to an instructor who was new to teaching with primary sources, one respondent replied, "Buy [their librarian] a cup of coffee." The data in our research emphatically shows that relationships between faculty and librarians is perhaps the most effective method to promote services such as library instruction on finding, evaluating, and selecting primary sources to their students. Therefore, we recommend increasing these efforts in building relationships between instructors and their subject liaisons and curators. Such activities might include instruction sessions on navigating the library and its sometimes bewildering array of print and digital resources as well as the digitization of primary materials and other course reserves.

Building these types of relationships can be very productive and rewarding for librarians and teaching faculty but they require a significant amount of effort. Librarians will need to reach out to the faculty well in advance of the semester in order to get to know them, what they research, what classes they teach, and in which classes they intend to incorporate primary sources. Having a course syllabus can also be useful to the librarian to see what kinds of assignments are being required, and what kinds of sources are expected to complete those assignments. Librarians with an understanding of the pedagogical methods and a detailed knowledge of the collection can add value by directing attention to specific resources that could be especially useful for a given course. Working together, the instructor and librarian can identify suitable primary sources and decide upon the best method of delivery for the class.

CONCLUSIONS

For years, librarians have been invited to attend class sessions to instruct students on library sources. Sometimes this is the librarian going to the class, or the class coming to the library. When working with primary sources that may not be accessible outside an archive, it's ideal to have the professor bring their class to the materials. This is where librarians can shine with their expertise and assist students to understand and conceptualize through concrete examples. This also gives the librarian an opportunity to instruct on relevant primary source databases or electronic resources that have digitized primary sources. It also provides the opportunity for the infectious magic that happens when students get to physically interact with sources created tens, or even hundreds of years ago.

On the other hand, online research and education are here to stay. Understandably, instructors still wish to bring their students to special collections for the hands-on experience. Doing so sparks curiosity and passion, but also serves to ground students' research practices in tangible and time-tested methodologies. Despite the pervasiveness of digital content utilized in the average classroom, there remains concern among some respondents regarding how to offer a meaningful experience of primary sources for students engaged in distance learning. These two modes of research -- in-person and online -- are unique and utilize materials of very different natures. Thus, they each require their own form of instruction. Librarians and curators have much experience offering instruction to support traditional research methods using physical materials and, to a lesser extent, prominent databases. However, we have yet to fully develop analogous curricula in support of the full spectrum of activities that currently encompasses

digital research. We, librarians and instructors, remain in a period of transition between the old world of all print, and the brave new world of all digital; and we must work together as we educate the next generations.

ITHAKA S·R

Semi-Structured Interview Guide

Background

Briefly describe your experience teaching undergraduates. *Examples: how long you've been teaching, what you currently teach, what types of courses (introductory lectures, advanced seminars) you teach*

 » How does your teaching relate to your current or past research?

Training and Sharing Teaching Materials

How did you learn how to teach undergraduates with primary sources?

 » Did you receive support or instruction from anyone else in learning to teach with primary sources?

 » Do you use any ideas, collections of sources, or other instructional resources that you received from others?

 » Do you make your own ideas, collections of sources, or other instructional resources available to others? If so, how? If not, why not?

Course Design

I'd like you to think of a specific course in which you teach with primary sources that we can discuss in greater detail.

 » Do you have a syllabus you're willing to show me? I will not share or reproduce this except for research purposes.

 » Tell me a bit about the course. *Examples: pedagogical aims, why you developed it, how it has evolved over time*

» Explain how you incorporate primary sources into this course. *If appropriate, refer to the syllabus*

» Why did you decide to incorporate primary sources into this course in this way?

» What challenges do you face in incorporating primary sources into this course?

» Do you incorporate primary sources into all your courses in a similar way? Why or why not?

In this course, does anyone else provide instruction for your students in working with primary sources? *Examples: co-instructor, archivist, embedded librarian, teaching assistant*

» How does their instruction relate to the rest of the course?

» How do you communicate with them about what they teach, how they teach it, and what the students learn?

Finding Primary Sources

Returning to think about your undergraduate teaching in general, how do you find the primary sources that you use in your courses? *Examples: Google, databases, own research, library staff*

» Do you keep a collection of digital or physical sources that you use for teaching?

» What challenges do you face in finding appropriate sources to use?

How do your students find and access primary sources?

» Do you specify sources which students must use, or do you expect them to locate and select sources themselves?

» If the former, how do you direct students to the correct sources? Do you face any challenges relating to students' abilities to access the sources?

» If the latter, do you teach students how to find primary sources and/or select appropriate sources to work with? Do you face any challenges relating to students' abilities to find and/or select appropriate sources?

Working with Primary Sources

How do the ways in which you teach with primary sources relate to goals for student learning in your discipline?

» Do you teach your students what a primary source is? If so, how?

> » To what extent is it important to you that your students develop information literacy or civic engagement through working with primary sources?

In what formats do your students engage with primary sources? *Examples: print editions, digital images on a course management platform, documents in an archive, born-digital material, oral histories*

> » Do your students visit special collections, archives, or museums, either in class or outside of class? If so, do you or does someone else teach them how to conduct research in these settings?
>
> » Do your students use any digital tools to examine, interact with, or present the sources? *Examples: 3D images, zoom and hyperlink features, collaborative annotation platforms, websites, wikis*
>
> » To what extent are these formats and tools pedagogically important to you?
>
> » Do you encounter any challenges relating to the formats and tools with which your students engage with primary sources?

Wrapping Up

What advice would you give to a colleague who is new to teaching with primary sources?

Looking toward the future, what challenges or opportunities will instructors encounter in teaching undergraduates with primary sources?