CHAPTER 11

Telling a Compelling Story:
Using the Guidelines for Primary Source Literacy to Teach Students How to Critically Use Original Library Documents

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Introduction

Primary sources are an intrinsic part of humanities and social sciences research and of the learning and research experience of many students. For the purposes of this book chapter, primary sources are understood to be "materials in a variety of formats that serve as original evidence documenting a time period, an event, a work, people or ideas" (ACRL RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy, 2018, p. 2). Although the importance of these types of sources is undeniable, relatively few library workshops focus on how to analyze and use them but rather emphasize how to distinguish primary from secondary or tertiary sources (Daines & Nimer, 2015). Inspired by the recent publication of the

Guidelines for Primary Source Literacy, the author, a liaison librarian in the humanities and social sciences, designed a new workshop on the use of primary sources in research. She also approached her colleagues in Rare Books and Special Collections to take advantage of their expertise in selecting physical primary sources and to establish and deliver the workshop. This collaboration marks a new approach at the McGill University Library where a liaison librarian and Rare Books and Special Collections librarians collaborated on the delivery of instructional offerings open to all students, rather than in the context of a specific course. The workshop provided a great opportunity to highlight the university's vast collections of physical and digital primary sources. The overall goal for students was not only to identify and find primary sources but also to use them critically by analyzing their biases, gaps, context, and narrative, and to use them ethically.

Literature Review
Primary Source Literacy

The importance of information literacy—and of the research skills that students should learn during their undergraduate and graduate studies—has been discussed at length by librarians (Carini, 2016). These discussions have enabled the creation of many different standards and competencies for information literacy. The first report on information literacy by the Association of College and Research Libraries (1989) led to the creation of the *ACRL Information Literacy Competency Standards for Higher Education* in 2000. More recently, the *Framework for Information Literacy for Higher Education* describes the knowledge practices and dispositions for six key areas of information literacy (Association of College and Research Libraries, 2015). Although information literacy is a ubiquitous aspect of librarianship, focus is usually placed on general research skills and the evaluation of sources with little discussion of primary sources (Carini, 2016). Some efforts have been made over the years to create outcomes and learning objectives for primary source instruction. Yakel and Torres (2003) were the first authors to discuss the need to focus on information literacy for primary sources. They interviewed twenty-eight individuals to determine the knowledge needed to interact with and use primary sources. This led them to define three main categories of knowledge: domain knowledge, artefactual literacy, and archival intelligence (Yakel & Torres, 2003). The authors argue that domain knowledge should be addressed in their courses and that librarians should focus on artefactual literacy or the ability to interpret and analyze primary sources. In addition, students should be instructed in archival practices and principles as well as archival intelligence, which they define as the ability to search for primary sources and understand their relationship to secondary sources (Yakel & Torres, 2003). Yakel (2004) authored a subsequent article that outlined the importance of primary source literacy and

critical-thinking skills when students can access sources at any time online. More recently, archivists and special collections librarians have attempted to create learning outcomes and guidelines for primary source literacy or have adapted information literacy guidelines to include primary sources (Carini, 2009, 2016; Daines & Nimer, 2015; Maksin & Clements, 2013; Sutton & Knight, 2006). Carini (2016) adapted the *ACRL Information Literacy Competency Standards for Higher Education* to include specific primary source competencies and used Yakel and Torres's article to create learning outcomes. Similarly, Daines and Nimer (2015) created guidelines using Yakel and Torres's concept of artefactual literacy and paired it with cultural heritage literacy, which is the understanding of how cultural institutions curate and manage materials.

ACRL Guidelines for Primary Source Literacy

Following many attempts to define primary source literacy, an official set of guidelines was constructed. In February 2018, the ACRL Board of Directors approved the *Guidelines for Primary Source Literacy*, which were developed by the Joint Task Force on the Development of Guidelines for Primary Source Literacy. The Task Force included members from the Association of College and Research Libraries' Rare Books and Manuscript Section and the Society of American Archivists (ACRL RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy, 2018). These guidelines articulate the difficulty in defining primary source literacy and its relationship to different types of literacies such as information literacy or visual literacy. They define primary source literacy as "the combination of knowledge, skills and abilities necessary to effectively find, interpret, evaluate, and ethically use primary sources" (ACRL RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy, 2018, p. 2). The guidelines are centered around four core concepts: analytical concepts or the ability to analyze, interpret and use critical-thinking skills with regard to primary sources; ethical concepts which focus on copyright and intellectual property rights; theoretical concepts, which draw attention to bias, context, and agency in primary sources; and practical considerations which focus on finding and accessing documents (ACRL RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy, 2018). From these four core concepts, a set of learning objectives was created to outline the knowledge and skills needed to engage in primary source research. The objectives are listed below, in order of the increasing complexity of each objective:

1. conceptualize
2. find and access
3. read, understand, and summarize
4. interpret, analyze and evaluate
5. use and incorporate

While many members of the task force published their thoughts on primary source literacy during the creation of the *Guidelines*, Hauck and Robinson were the first to implement them into their instruction (Hauck & Robinson, 2018). They created scaffolded research assignments for a history course that encouraged hands-on research with primary sources. After surveying the participants of the class, the authors noted an improvement in primary source literacy over the course of the semester (Hauck & Robinson, 2018).

Digital Primary Sources

Although much as been written on the subject of teaching primary sources, relatively few articles focus on providing instruction with digital or digitized primary source documents (Hauck & Robinson, 2018). In 2013, Maksin and Clements created learning outcomes and activities using the *ACRL Information Literacy Standards* and the *ACRL Visual Literacy Competency Standards for Higher Education* that addressed both print and digital primary sources. They aimed to present "a more holistic and accurate view of the primary source research landscape" (Maksin & Clements, 2013, p. 64). Similarly, Bahde (2013) underlines the importance of engaging students in a conversation about how digitized sources differ from physical primary sources and how this can affect the research process. Hauck and Robinson (2018) followed this principle and gave students the opportunity to engage with physical primary sources as well as digital sources from subscription-based tools, publicly available repositories, and digital archives created at their institution. Some special collections librarians have been integrating digital collections into online learning modules (Jarosz & Kutay, 2017; Westermann, 2014). For example, Jarosz and Kutay (2017) describe having great success in creating online learning modules for four specific courses. The modules enabled students to discover and use digital sources and helped them gain the ability to understand and critically analyze primary sources.

Teaching Collaborations Utilizing Primary Sources

Since archivists and special collections librarians have been at the forefront of the conversation on primary sources, most articles describe instructional collaborations between these specialized information professionals and faculty members (Bahde, 2011, 2013; Carini, 2009; Daines & Nimer, 2015; Kitchens, 2001; Krause, 2010). While some librarians have the opportunity to create several sessions on primary sources for students for a specific course, others can only rely on a single instruction session to impart their knowledge (Bahde, 2011, 2013; Daines & Nimer, 2015; Kitchens, 2001). It is also interesting to note, but perhaps not surprising, that most collaborations with faculty members take place in the field of history (Bahde, 2013;

Daines & Nimer, 2015; Kitchens, 2001). Accordingly, most primary source instruction is part of targeted information literacy efforts in the context of a course; very few introductory or general library instruction sessions include primary source literacy (Hubbard & Lotts, 2013; Sutton & Knight, 2006). Sutton and Knight (2006) combined their expertise with primary and secondary sources to create active learning opportunities for their students during a general library instruction session. This has enabled their students to get a better understanding of the relationship between these types of sources and has fostered greater critical-thinking skills. Although the traditional collaboration with regard to primary sources usually includes a faculty member and a special collections librarian, some partnerships have brought together liaison or instruction librarians with their special collections or archives counterparts (Hubbard & Lotts, 2013; Jarosz & Kutay, 2017; Maksin & Clements, 2013; Sutton & Knight, 2006). Maksin and Clements (2013) argue that these types of partnerships bring together different types of expertise and "enhance student learning and research" (p. 62).

Institutional Context

McGill University is a public research university located in Montreal, Canada. It offers programs at the undergraduate and graduate levels in the agricultural sciences, education, humanities and social sciences, management, science and engineering, as well as law, dentistry, music, and medicine. The McGill University Library is composed of eight branches and employs more than sixty-five librarians. The library is composed of multiple departments, including User Services, Digital Initiatives, Collection Services, and Rare Books and Special Collections. Librarians who do not hold administrative positions usually fall within two categories: liaison librarians and functional specialists. Liaison librarians are usually assigned to several departments within specific faculties. For example, the author is the liaison librarian responsible for the departments of Political Science and Philosophy as well as the School of Religious Studies within the Faculty of Arts. Liaison librarians are part of the User Services department and liaise directly with their assigned disciplines to engage in collection development, reference, and information literacy activities. The department of Rare Books and Special Collections also includes liaison librarians who focus on providing access and research support for the library's extensive collection of rare and special documents, many of which are primary sources. These librarians also offer instructional workshops, mostly designed for specific courses. Accordingly, they interact with the instructors of those courses directly. Given their differences in expertise, liaison librarians from User Services and from Rare Books and Special Collections rarely teach together; they mostly communicate with one another and refer questions to each other in order to offer the appropriate level of support for faculty members and students.

Justification

Several factors precipitated the decision to design a general primary sources workshop. First and foremost, the release of the new *Guidelines for Primary Source Literacy* provided a new pedagogical framework that the author wanted to engage with. The author also attended a two-day training workshop on course design during the summer of 2018 and was interested in using the new techniques she learned in combination with the competencies and learning outcomes outlined in the *Guidelines*. Other training opportunities also had an impact on the creation of the primary sources workshop. The *Engaging with the ACRL Framework* workshop provided the opportunity to examine in-depth knowledge practices and dispositions and to learn ways to integrate them into library instruction workshops (ACRL, 2017). The author was later able to apply the knowledge from this specific workshop to the *Guidelines*.

Other factors also played a role in the creation of the primary sources workshop. As a new librarian at the McGill University Library, the author engaged in several outreach activities to get to know her subject areas and users. The quality and extent of the primary source collections in her subject areas—religious studies and philosophy—was readily apparent, and she was motivated to increase the awareness of the students and faculty members of them. The author also became aware of the large digital collections of primary sources that were either supported by digitization efforts at McGill or that were available through subscription-based online databases. The discovery of the various collections of primary sources available to students and faculty at the library, coupled with the desire to increase knowledge and access to them, encouraged the author to create a primary source workshop. Although she could have created a workshop specifically designed for her subject areas, she thought a more general approach to the topic would enable the participants to see different examples that they may not get a chance to engage with in the course of their studies. Using materials from various fields also enabled the author and her colleagues to select the best items to exemplify the concepts from the *Guidelines*. This also marked a new approach to primary source literacy at the McGill University Library given that most workshops are usually course- or discipline-focused.

Finally, the author wanted to engage with a different approach to teaching workshops. As previously discussed, most liaison or instruction librarians tend to focus on teaching the discovery and use of secondary sources (Daines & Nimer, 2015). The author wanted to change this paradigm and have the opportunity to work with the primary sources that are often referred to in her usual teaching. Since most workshops focus on information literacy skills and the use of online tools, the author was interested in developing a new approach to teaching that would enable participants to interact with physical and digital sources and to engage with them at a deeper level. Furthermore, including physical primary sources in the workshop fostered the opportunity to work closely with colleagues in Rare Books and Special Collections.

Collaborating with new colleagues and learning from their expertise was also a particular interest.

Course Design
Using the Guidelines

Before approaching her Rare Books and Special Collections colleagues regarding this collaboration, the author created a workshop outline so that they would have a shared understanding of the objectives and areas that she was interested in addressing (see appendix A). Given that it would be impossible to cover all aspects of the *Guidelines*, the author selected four specific learning objectives from three of the five categories of objectives. The workshop focused on "find and access," "read, understand, and summarize" as well as "interpret, analyze, and evaluate." The instruction session was intended to provide a more in-depth look at primary sources; therefore, the objectives surrounding "conceptualize," which focus on identifying what a primary source is, were left out. The objectives surrounding "use and incorporate" were also left aside since they are too ambitious for a two-hour workshop setting and would find better use in the context of a semester-long course or seminar. The author chose to instead focus on "find and access" to promote and maximize the accessibility of the library's collections, "read, understand, and summarize" to convey that primary sources are iterative documents, and "interpret, analyze, and evaluate" to show that primary sources, much like secondary sources, can include a bias.

Integrating the *Framework for Information Literacy for Higher Education*

To deepen the knowledge of the participants, the author also paired the learning objectives from the *Guidelines* to the frames from the *Framework for Information Literacy for Higher Education*. Although the two documents share similarities in the way they address certain learning concepts, the *Framework* clearly articulates the behaviors that users should exhibit (knowledge practices) and the attitudes that they should value (dispositions), whereas the *Guidelines* only supply a list of learning objectives. By using the two pedagogical approaches, the author was able to create targeted teaching strategies to address primary source competencies and information literacy competencies and to pick the best items to exemplify them. For example, the learning objective that encourages scholars to "critically evaluate the perspective of the creator of a primary source" (ACRL RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy, 2018, p. 5) was a direct match to the frame Authority is Constructed and Contextual. The author then combined the learning objectives to the knowledge practices and dispositions

of the *Framework* to create a targeted set of skills that participants should acquire during the workshop. Participants should be able to evaluate the knowledge and bias of the creator of the sources as well as the way the information is presented to its audience. By combining the evaluation of the content and of its representation, participants gain a better understanding of how items can influence and alter the perception of their intended audiences. By adding a disposition, the author was able to impart that users of primary sources need to consider authority and perspective while keeping an open mind.

Learning Activities

The author initially created activities to strengthen the learning processes outlined above. To appeal to different learning styles, the activities focused on interacting with materials, personal reflections, and sharing among peers. Since the workshop focused on more advanced learning objectives, it was important to ensure that all attendees were at the same level and understood the concept of primary sources. A quiz that asked participants to differentiate between primary and secondary sources was used at the start of the session to identify their prior level of knowledge. The author also chose learning activities to accommodate both physical and digital primary sources and to ensure that participants could accomplish them regardless of the learning environment they would be in. For example, to bring attention to the fact that certain types of primary sources may not exist or are underrepresented, the author created a short quiz. The goal of the quiz was to make participants aware that certain historical figures are more well-known than others. The author would bring up a slide with a representation of Shakespeare and ask attendees to identify him. All participants were able to do so. Subsequently, the author would show a slide with a photograph of Katherine Johnson, the late NASA mathematician and a woman of color who calculated several important space shuttle trajectories. In both iterations of the workshop, no participant could identify her. This activity demonstrated, with very specific examples, that history favors certain narratives and that users of primary sources should be mindful when selecting materials.

Workshop Development and Delivery
First Iteration

To implement this initiative, the author first met with the head librarian of Rare Books and Special Collections to suggest a collaboration with some librarians in his department. The idea was immediately met with a high level of enthusiasm and

two liaison librarians from Rare Books and Special Collections agreed to partner with the author on this initiative. The author presented the course outline to the two librarians who agreed with the workshop structure and objectives. After discussing the logistics of the workshops, all librarians agreed that the author would select digital primary sources from the library's subscription-based tools while the Rare Books and Special Collections librarians would identify complementary physical materials, some of which have been digitized by the library. The author created a preliminary slide deck outlining the learning objectives, some directed questioning, and information about primary source repositories. Meanwhile, the Rare and Special Collections librarians used their expertise to add content related to the items that they selected and included the appropriate level of detail and terminology. Once the librarians selected the primary source examples and finalized the learning materials, they rehearsed the workshop without participants.

While the first iteration of the workshop was a success, it also revealed possible areas of improvement. The author's teaching style proved to be more adapted to teaching secondary literature searching and online tools. Traditionally, primary source instruction with rare materials takes an approach that focuses on the physical objects and their background, and accordingly, the librarians from Rare Books and Special Collections used this teaching style for the workshop (Carini, 2009). This teaching approach provided the author and the participants with important information about the background of the rare items selected and clarified the different terminology used when discussing rare or special artifacts. However, it meant that more time had to be dedicated to the physical items rather than the digital ones. The author, not being familiar with the nature of the documents and this instructional approach had underestimated the time and resources required to do it effectively. Being exposed to a different teaching approach made her aware of the importance of combining different teaching styles to create a hybrid approach that would be better suited to a workshop involving both physical and digital items.

The author also intended to introduce students to a large variety of types of items, both physical and digital, and to go back and forth between complementary items in both media. Unfortunately, it proved difficult to balance the requirements of engaging with different types of sources. Participants had to turn away from physical items to look at a screen for a demonstration of a digital resource, which broke up the flow of the session. Given the time constraints and quantity of materials, participants were not able to interact with all the items or complete the learning activities. Furthermore, it became clear during the workshop that the students had overestimated their knowledge regarding primary sources. The author anticipated that the participants would have a good understanding of what a primary source was; however, most attendees lacked an introductory knowledge of the topic. The librarians received useful feedback from their colleagues and decided to implement some changes to the workshop.

Second Iteration

The second iteration of the workshop incorporated fewer primary source examples and more time for activities. The author's colleagues shared their approach to creating learning activities for primary sources, which greatly helped her understand their overall approach to teaching. The activities were altered from the original course design and focused on discerning different types of documents that aligned with the materials displayed and the time constraints. Although the "show and tell" approach was retained, a better balance between physical and digital sources was achieved by dividing the workshop into two parts: the physical primary sources and the digital sources. Overall, the author was pleased with the second iteration of the workshop and received similar feedback from her colleagues from Rare Books and Special Collections. The librarians agreed to keep working on the workshop to improve its content and their approaches to teaching primary sources.

Lessons Learned and Future Directions

The author enjoyed the opportunity to work with colleagues who have expertise in a different field than hers. Although the overall experience was a very positive one, where shared learning occurred, some challenges also presented themselves. The author was used to a different teaching style than the one commonly employed to teach physical primary sources and had to adjust her expectations and the learning activities to better match the examples used. Certain terms such as "format" and "type" are used differently by liaison librarians and librarians who specialize in rare and special collections; therefore, establishing a common vocabulary was a priority. Keeping an open mind and being flexible in terms of the vision of the workshop were also important lessons for the author. The librarians benefited from sharing their expertise in different types of collections and subject areas. For example, the author, a liaison librarian, was able to gain valuable knowledge into the physical collections of the library and their digitization efforts.

   In terms of the workshop, it became clear that participants did not all possess knowledge of primary sources and that their level of knowledge on the topic varied greatly. Creating a more introductory-level workshop or adjusting the learning objectives to reflect this reality could be a way to address this issue. Similarly, it proved challenging to teach both physical and digital sources within the same session, not only in terms of time allocated to each type of source but also in terms of the logistical requirements of each. Rare and special collections must be handled very carefully; rooms must be appropriately equipped to display them and class size must be kept small to avoid damage to the materials. Online resources require a very

different environment for optimum teaching and learning. Workshop participants should be able to either bring their own computers or use computers provided by the library to be able to interact and practice skills on the online platforms. Combining the differences in requirements for sources was difficult to manage, and no room in the library was adequate to both showcase rare and fragile materials as well as provide computers for the attendees. Workshop participants were therefore only able to interact with the physical sources and not the online ones. This issue could be addressed by offering the workshop in a larger space that could be separated into stations; for example, a station for the display of certain physical items and one where computers are available to the participants so that they can engage with relevant online sources.

Some possible future directions include offering a primary source workshop based solely on digital primary sources. The author noticed that the workshop participants knew very little about the subscription-based tools that the library offers and is currently working on incorporating those into a broader workshop focused on using primary sources in research. Sutton and Knight (2006) have argued the importance of combining primary and secondary source instruction to provide students with a deeper level of understanding of the research process. The author aims to engage students at a deeper level by using their findings in the creation of a new general instruction workshop. Another option would be to tailor the workshop offered in collaboration with the Rare Books and Special Collections librarians to specific subject areas. The McGill Library has extensive collections in religious studies and philosophy, which would enable the librarians to design a version of this workshop and integrate it into a class. A course-based workshop could lead to a deeper level of engagement on the part of the students, especially if they have to use them for a research paper or assignment. Moreover, digital humanities projects would be a natural partner for primary source materials. The author could approach members of her departments who are interested in this field and propose a potential collaboration that would result in student assignments and final projects that incorporate digital humanities platforms and primary source collections. Such a collaboration could increase the exposure of some of the collections held by the university and would enable students to develop higher-level skills related to primary source literacy.

Conclusion

With the recent publication of the *Guidelines for Primary Source Literacy,* many librarians will be rethinking their roles with regard to these types of sources and will be engaging with new approaches to teaching them. A close collaboration between liaison librarians and rare books and special collections librarians greatly benefited the design and delivery of this new general instruction workshop on primary source literacy. Although there were some initial setbacks and challenges, the author learned

a great deal of new information from her colleagues and is confident in the quality of the workshop they offered together. Continuous improvement of the workshop is ongoing and other primary source literacy opportunities are being explored. Different approaches to measure the success of the workshop and to assess the level of learning that the participants were able to achieve will be considered in order to assess the workshop in the future.

Acknowledgments

Appendix 11A—Course Outline

ACRL Guidelines Learning Objectives	ACRL Frames for Information Literacy	Knowledge Practices and Dispositions	Content/ Examples	Learning Activities
(Find and Access) Distinguish between catalogs, databases, and other online resources that contain information about sources versus those that contain digital versions, originals, or copies of the sources themselves.	**Searching as Strategic Exploration** Enduring understanding: Searching for information is often nonlinear and iterative, requiring the evaluation of a range of information sources and the mental flexibility to pursue alternate venues as new understanding develops.	• **KP**: Match information needs and search strategies to appropriate search tools. • **Dispositions**: Realize that information sources vary greatly in content and format and have varying relevance and value, depending on the needs and nature of the search.	• Finding primary sources • Online primary source repositories • Searching for rare books and archives	• Background knowledge probe: primary vs. secondary sources quiz • Go to subject guide and find one primary source you are interested in.
(Find and Access) Understand that historical records may never have existed, may not have survived, or may not be collected and/or publicly accessible. Existing records may have been shaped by the selectivity and mediation of individuals such as collectors, archivists, librarians, donors, and/or publishers, potentially limiting the sources available for research.	**Information Has Value** Enduring understanding: Legal and socioeconomic interests influence information production and dissemination.	• **KP**: Understand how and why some individuals or groups of individuals may be underrepresented or systematically marginalized within the systems that produce and disseminate information. • **Dispositions**: Are inclined to examine their own information privilege	• Redacted US Documents (Gale U.S. Declassified Documents)	• Directed questioning: Who is this person (Shakespeare) vs. this person (Kathryn Johnson)?

ACRL Guidelines Learning Objectives	ACRL Frames for Information Literacy	Knowledge Practices and Dispositions	Content/ Examples	Learning Activities
(Read, Understand & Summarize) Understand that a primary source may exist in a variety of iterations, including excerpts, transcriptions, and translations due to publication, copying, and other transformations.	**Information Creation as a Process** Enduring understanding: Information in any format is produced to convey a message and is shared via a selected delivery method.	• **KP**: Recognize that information may be perceived differently based on the format in which it is packaged. • **Dispositions**: Accept that the creation of information may begin initially through communicating in a range of formats or modes.	• The Travels of Marco Polo (Medieval Travel Writing, Adam Matthew Digital)	Think-pair-share activity
(Interpret, Analyze, and Evaluate) Critically evaluate the perspective of the creator(s) of a primary source, including tone, subjectivity, and biases, and consider how these relate to the original purpose(s) and audience(s) of the source.	**Authority is Constructed and Contextual** Enduring understanding: Information resources reflect their creators' expertise and credibility and are evaluated based on the information need and the context in which the information will be used.	• **KP**: Recognize that authoritative content may be packaged formally or informally and may include sources of all media types; define different types of authority such has subject expertise, societal position, or special experience. • **Dispositions**: Develop and maintain an open mind when encountering varied and sometimes conflicting perspectives.	• First-hand accounts (Empire Online, Adam Matthew Digital) • Maps (Empire Online, Adam Matthew Digital)	Jigsaw activity

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