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# Of Primary Importance: Applying the New Literacy Guidelines

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## **“Of Primary Importance: Applying the New Literacy Guidelines”**

### **Abstract**

Written by a librarian and a history professor, the purpose of this article is to describe a collaborative, primary source literacy project, and report its effectiveness in teaching undergraduates to critically analyze information and develop primary source literacy. The methodology employed included a research project with 24 undergraduates, and a pre- and post-survey. The research project and student survey incorporated principles from the “Guidelines for Primary Source Literacy,” published in 2017 by the ACRL’s Rare Books & Manuscripts Section and the Society of American Archivists. The article offers research and practical implications for librarians and instructors interested in strategies to teach information literacy. For instance, the article includes a review of literature on “archival intelligence” or “primary source literacy,” and describes the 2017 Guidelines for Primary Source Literacy. Socially, the article includes implications for how to create an inclusive learning experience for students with mechanisms such as a scaffolded assignment, hands-on instruction, imposter syndrome awareness, and a no-Google policy. Given that this is one of the first articles to document how practitioners are incorporating the 2017 Guidelines, this is sure to be an original and valuable essay.

### **Introduction**

Since the 2016 United States presidential election, questions of truth and accuracy have gripped the American consciousness. Terms like “fake news,” “alternative facts,” and “foreign disinformation” have highlighted the value of archival intelligence and information literacy, and the need for intentional instruction in this area. For example, Congressman Will Hurd of the House Intelligence Committee stated it was important that “we are all a little bit more critical in reviewing the information that we consume on a daily basis--and I think this is something that we should be, you know, talking about in

schools when you're learning how to do a research paper..." (Lawmakers, 2017). Of course, the value of analyzing sources has long been a priority for academic librarians and other educators, but these skills have taken on an added urgency in the current national context. This article describes a primary source literacy project that aimed to better equip undergraduates to critically analyze information and execute primary source research.

The term 'archival intelligence' was coined over a dozen years ago by Elizabeth Yakel and Deborah Torres in their seminal *American Archivist* article, "AI: Archival Intelligence and User Expertise" (Yakel and Torres, 2003). Over the intervening years, this same concept emerged with the moniker "information literacy for primary sources," and finally settled into its current iteration, "primary source literacy." The profession's ongoing discussion around these concepts has fueled the recent work of a two-year Joint Task Force commissioned by the ACRL's Rare Books & Manuscripts Section and the Society of American Archivists. The intensive work of the Task Force culminated in the August 2017 release of the document, "Guidelines for Primary Source Literacy," at the 2017 Society of American Archivists Conference in Portland, Oregon.

The release of the Guidelines has been very timely, especially for academic librarians whose institutions are placing increased focus on student learning outcomes and measures of assessment. This is certainly the case at the authors' liberal arts university, where one author, a librarian, recently partnered with the other author, a history professor, on an innovative primary source literacy project. Librarians have been well aware of the ACRL Information Literacy Competency Standards, approved in 2000, and their successor, the 2016 ACRL Framework for Information Literacy in Higher Education. Now a new set of standards has emerged to guide literacy instruction with primary sources, working in tandem with long-

standing secondary source literacy instruction. The authors have embraced this new addition wholeheartedly.

This article will detail the collaborative project undertaken within a semester-long course on African American History, in which the authors utilized the brand-new Guidelines for Primary Source Literacy. The article will serve as a case study of the application of the Guidelines, describing student learning outcomes developed from the “Learning Objectives” section of the Guidelines, and will describe assessment measures carried out in the form of pre- and post-surveys. Also discussed will be intermediate steps taken along the way, in the form of librarian-led literacy instruction as well as professor-led content delivery. The final class projects receiving ‘A’ grades are undergoing final editing, and will shortly be uploaded to the institution’s digital repository, serving as signposts of student learning and scholarly output. Finally, the adjustments made after assessing the project will be outlined, along with a new partnership opportunity that has developed as a result.

There are two voices present in this article; one is that of the librarian partner, and the other is that of the history professor. It is the authors’ hope that the inclusion of both perspectives centered around a common project will add value to the analysis of the project’s goals and outcomes. Ultimately, both partners undertook the project for greater learning opportunities for the students in the course.

### **Literature review**

The literature on primary source literacy has taken a linear path, with each new article building directly on the experiences and observations described in the previous one. Beginning with Yakel and Torres’ article on archival intelligence (Yakel and Torres, 2003), additional articles were published every year or two focused on “information literacy for primary sources,” and later on “primary source literacy.” The

literature chosen for this review will highlight studies that foreshadowed concepts included in the Guidelines for Primary Source Literacy, or that directly mentioned the Task Force’s preliminary work. It is important to note that at least five members of the Task Force were simultaneously publishing their own studies in the literature, therefore lending informed expertise to the formulation of the Guidelines.

The concept of ‘archival intelligence’ was introduced by Elizabeth Yakel and Deborah Torres in their seminal 2003 *American Archivist* article, “AI: Archival Intelligence and User Expertise” (Yakel and Torres, 2003). Through researcher interviews, the authors sought to determine the characteristics that denoted an expert user of archives. They noted that assisting users to become experts might require “a move away from a focus on ‘how to do research here’ toward a more conceptual understanding of archives and search strategies” in order that users could “navigate multiple repositories and identify primary sources from afar” (Yakel and Torres, 2003). Their findings showed that “information literacy for primary sources would entail re-conceptualizing the one-shot archival orientation class into a broader and deeper curriculum” (Yakel and Torres, 2003). Yakel continued this theme in a 2004 article, where she targeted archivists and researchers in both the analog and digital realms and emphasized a move toward “defining core knowledge and skill sets that would comprise information literacy for primary sources” (Yakel, 2004). Doris Malkmus, in a 2008 article, continued this forward-looking view by stating that there would need to be “a good deal of joint planning and consultation between archivists and educators before primary sources could be an effective teaching tool” (Malkmus, 2008).

In their 2009 article, Archer, Hanlon, and Levine reported on a task-based study they conducted with 17 undergraduate students at the University of Maryland. They framed their results around three issues that indicated gaps in the primary source literacy of the students they studied. These three areas were direct precursors to the 2017 Guidelines: 1) definition and understanding of a primary and secondary

source, 2) knowledge of special skills needed to conduct primary source research, and 3) ability to understand archival description and access. They stated, “While the importance of teaching students to use primary sources is clear, what is less evident is how to best educate students about these specialized sources” (Archer *et al.*, 2009). The phrase “information literacy for primary sources” continued to be used in Peter Carini’s 2009 article, but he stated that the scope of information literacy was too narrow. Carini noted that it did not cover areas such as the evaluation of the physical artifact (including handwriting), the importance of audience, the formation of a narrative (including perspective), date, and chronology (Carini, 2009). These additional areas are ones that have also emerged in the Guidelines.

While Yakel and Torres identified the need to go beyond a one-shot presentation, ACRL Joint Task Force member, Anne Bahde, was the first in the literature to implement this recommendation, as described in her 2013 article, “The History Labs.” For this case study, Bahde and a history instructor partnered to develop a series of cumulative exercises that taught primary source literacy to students in a history survey course. They compiled a list of eight skills to be learned, which would reappear in a more succinct form in the Guidelines (Bahde, 2013). The impetus for these labs was the history instructor’s concern over previous poor student performance on final papers, and Bahde was pleased to conclude that “student performance on their final papers indicates that a skills-based laboratory approach positively affects student achievement” (Bahde, 2013). Bahde would then go on to co-edit a book on the subject, *Using Primary Sources: Hands-On Instructional Exercises*. In the book, she and coeditors Heather Smedberg and Mattie Taormina promoted the importance of helping students develop archival intelligence and primary source literacy. They compiled a set of instructional exercises that represented more than the one-shot “show and tell” instruction session with primary sources, and would ultimately lead to the “the ability to analyze and interpret primary sources once they have been found” (Bahde, et al., 2014). Joint Task Force members Horowitz, Sjoberg, and Katz joined Bahde in submitting lesson ideas

to the book, and all the instructional exercises were purposefully linked to learning objectives applicable to either or both partners in a librarian-professor collaborative project.

Another Joint Task Force member, Sammie Morris, followed Bahde's article with a co-authored one of her own in 2014. This article made note of the fact that no standard existed to define the primary source research competencies needed by college history students. The purpose of the study was "to identify history faculty expectations of undergraduates regarding their research skills, and, based on those expectations, to create a list of archival research competencies that could be... introduced in archival literacy sessions" (Morris *et al.*, 2014). Through a review of history course syllabi, along with faculty interviews and comments, a list of seven categories of research competency was compiled. Again, similarities to the eventual Guidelines were apparent in this list, under headings such as "accurately conceive of primary sources," "locate primary sources," and "use a research question, evidence, and argumentation to advance a thesis." (Morris *et al.*, 2014) In a second phase of their research, Morris and her co-authors extended their study to institutions across the United States. Their 2015 article produced a resulting list of competencies that could be "consciously and intentionally integrated into existing courses" through increased collaboration among history faculty, archivists, and librarians. (Weiner *et al.*, 2015) They also recommended contextualizing archival literacy in history courses, assessing instruction and students' mastery of archival competencies, and creating practical tools and tutorials to teach archival research skills (Weiner *et al.*, 2015)

Yet another Task Force member, Gordon Daines, co-authored a spring 2015 article that directly stated the need for "establishing primary source literacy standards that involve defining what cultural heritage professionals mean by primary source literacy, and then developing appropriate learning outcomes and learning activities" (Daines and Nimer, 2015). This article made the first mention in the literature of the

creation of the Joint Task Force, and introduced the proposed literacies of evaluating, interpreting, and understanding ethical issues surrounding primary sources. Task Force member Sarah Horowitz followed in fall 2015 with her pilot assessment of student learning in special collections. Her results showed an increase in students' ability to communicate, organize, and synthesize information after working with primary materials. Horowitz noted that the "work of developing guidelines and tools for... assessing students' primary source literacy has only just begun, [and] will be an ongoing discussion in our community for many years to come" (Horowitz, 2015).

While not a Task Force member, Peter Carini, in 2016, detailed a framework for a set of standards and outcomes that would demonstrate information literacy with primary sources. He acknowledged the newly-formed Joint Task Force, and his set of six standards are in fact quite similar to the five settled upon in the Guidelines. Carini's standards included Know, Interpret, Evaluate, Use, Access, and Follow Ethical Principles. He concluded that the goal of this work is a common understanding of outcomes that will lead toward creating better users of primary sources (Carini, 2016).

The much-anticipated 2017 release of the Guidelines for Primary Source Literacy provided a welcome addition to, as well as an intersection with, a number of other literacies, including information literacy, visual literacy, and digital literacy. "Primary source literacy" is defined in the Guidelines as "the combination of knowledge, skills, and abilities necessary to find, interpret, evaluate, and ethically use primary sources within specific disciplinary contexts, in order to create new knowledge" ((ACRL/RBMS-SAA, 2017). Included in the Guidelines is a set of learning objectives that articulate broadly the knowledge, skills, and abilities needed by primary researchers. While the learning objectives do not lay out measurable outcomes, they can assist in articulating specific learning goals than can be assessed. Briefly, the five learning objectives are:



- 1) Conceptualize
- 2) Find and access
- 3) Read, understand, and summarize
- 4) Interpret, analyze, and evaluate
- 5) Use and incorporate

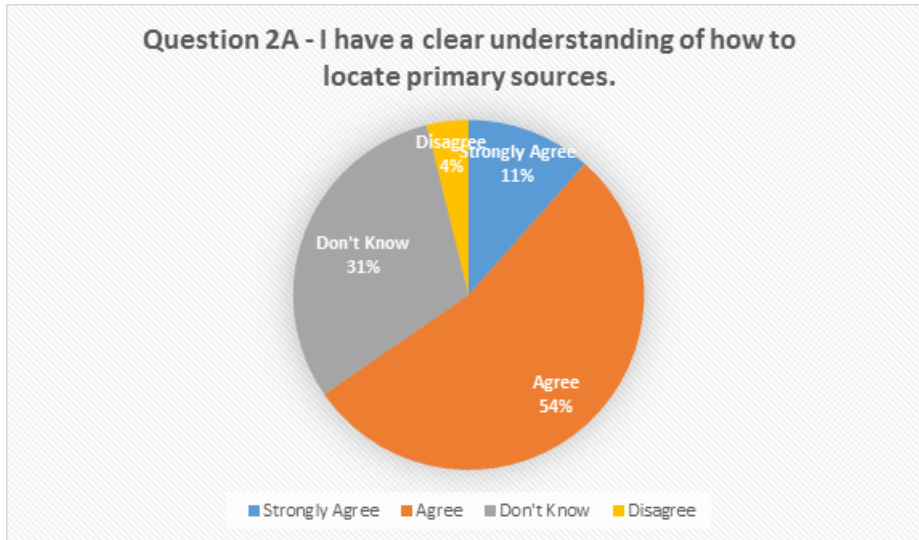
The authors used these five learning objectives to inform the questions asked of students in a pre-survey and post-survey administered at the beginning and end of the collaborative primary source project. They attempted to address as many of the objectives as possible over the course of the semester, through librarian-led instruction, along with class time and one-on-one meetings between the professor and his students. What follows is an analysis of the survey results.

### **Survey Design and Results**

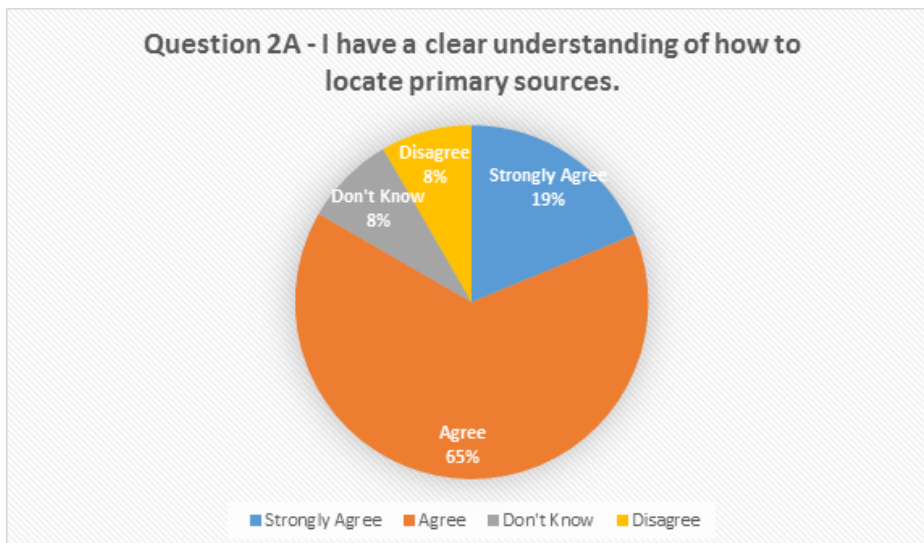
To assess how well this project helped students build primary source literacy, the authors developed a survey (Appendix A) to be administered at the beginning and end of the course. The setting was a 200-level African American history course taught by one of the authors, which included 24 undergraduate students. Also, the students were mostly in their first and second year of college, and most were not history majors. Out of a total of 24 students, there were 12 freshmen, 7 sophomores, 3 juniors, and 2 seniors. Only three of the students were history majors, while the rest were majoring in a range of fields: psychology, physics, business management, and others. Overall, by the end of the semester, 17 students (71 percent) effectively used primary sources in their projects and demonstrated basic primary source literacy. The following is a summary of the survey findings (see Appendix B for entire set of findings).

One survey finding was that most students reported confidence in their ability to find primary sources by the end of the term. In response to the prompt, “I have a clear understanding of how to locate primary sources,” the amount of students selecting “agree” and “strongly agree” increased from 65 percent on the pre-survey to 84 percent on the post-survey.

### Pre-Survey

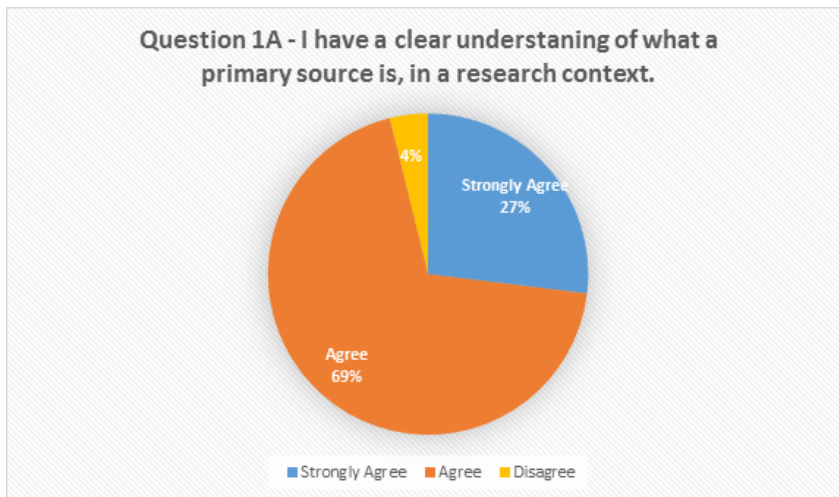


### Post-Survey



To the prompt, “I have a clear understanding of what a primary source is, in a research context,” most of the students either “agreed” or “strongly agreed” on the pre-survey and the post-survey, but the “strongly agreed” answers increased from 27 percent to 52 percent by the end of the term. This reiterated the conclusion that the students gain a greater familiarity with primary sources by the end of the project.

#### Pre Survey



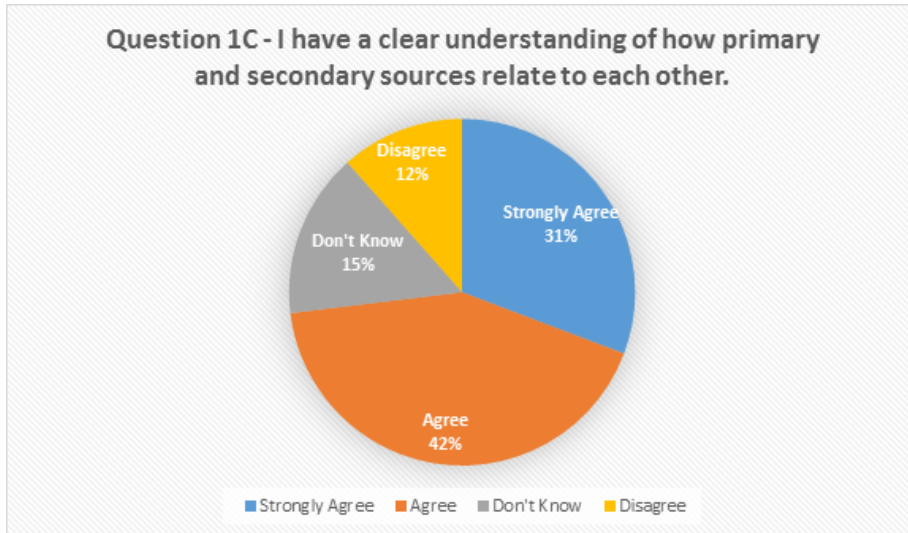
#### Post Survey



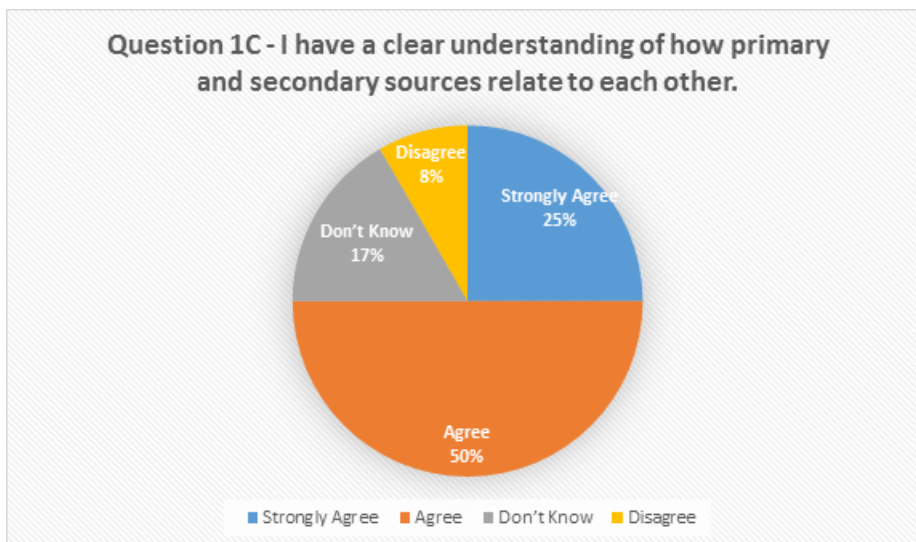
However, the surveys also indicated room for improvement. For instance, in the pre- and post-surveys, 25 percent of the students selected “Don’t know” or “Disagree” in response to “I have a clear

understanding of how primary and secondary sources relate to each other.” In other words, the number of students indicating that they did not have an understanding of primary and secondary sources was unchanged throughout the course.

#### Pre-Survey



#### Post-Survey



This suggests a subset of the students entered the class with limited knowledge of primary sources and did not feel they had expanded their understanding by the end of the course. Moreover, students were

asked to articulate how primary and secondary sources relate to each other in an open-ended question. Many students wrote on the post-survey that primary and secondary sources were related because “a secondary source could be an analysis of a primary document” or “primary is from the time of said source,” demonstrating primary source literacy. However, a small number of other post-surveys featured students who indicated they understood how primary and secondary sources relate, but then wrote explanations like “primary is your main source, secondary is your backup,” which does not demonstrate literacy. Therefore, the authors infer that some students did not gain greater primary source literacy, which has motivated adjustments and improvements in the assignment.

### **Background and Analysis**

Unlike a conventional historical research assignment, this project had students begin their research with a primary source. This was a brief account of an African American alumnus of the university wherein the class was taking place, often a yearbook photo and a few details gathered from alumni directories and the student newspaper. All the alumni offered for selection attended the university between 1940 and 1975, which complimented other assigned readings and course content. Students started by selecting an alumnus and then were tasked with researching the individual and larger socio-political developments during the alumnus’s student experience.

The characteristics of the twenty-four students in the class was also notable. As mentioned before, most of the students were underclassmen and non-history majors, providing insights into the average student and highlighting students recently out of high school. And, to reiterate, 17 students (71 percent)

effectively demonstrated basic primary source literacy at the end of the project. For instance, one student used a 1977 article in *Essence* magazine in a project on the politics of black women's hair, while another used student newspaper reports from the 1970s to explore discrimination against black football quarterbacks, and a third used the college yearbook to describe the life of Frances Scott, a 1970-80s activist and educator. Moreover, five of the papers were especially excellent and selected for inclusion in the university's institutional repository. By analyzing the students' work, the pre- and post-survey data, and the authors' observations of the students, valuable insights have been gained about effective strategies and areas for improvements. These insights involve four areas: scaffolded research projects, hands-on research practice, awareness of imposter syndrome, and "no Google" policy.

One useful insight affirmed the belief in the value of a scaffolded, or multipart, research assignment. To design the assignment, the history professor adapted materials from the Roots of Contemporary Issues program at Washington State University and created a five-part research project with due dates spread throughout the semester. As a scaffolded assignment, this project was intended to gradually build skills with progressively challenging tasks. This contrasts with conventional research assignments that have one final due date and do not help students differential the various steps in the research and writing process.

The first step, Library Research Assignment (LRA) 1, asked students to reflect on what they found intriguing about the initial primary source they selected, e.g. yearbook photos and brief biographical facts. Also, they were asked to generate research questions by using Wikipedia and contemporary newspapers to find search terms and topics related to their primary source. For example, one student selected a yearbook picture because the alumnus was a black quarterback, used Wikipedia to find information on college and professional football, and utilized newspapers to see how black quarterbacks

were discussed in currently society. Ultimately, this preliminary research was designed to inform a self-generated research direction.

In LRA 2, students were asked to find relevant primary and secondary sources. By this point, the students had already participated in an eighty-minute research tutorial led by the librarian, which explained primary and secondary sources and introduced targeted research tools. In LRA 2 directions, students were given further explanation of primary and secondary sources, asked to find at least one monograph and one journal article, and directed to refine their research questions.

In LRA 3, students had to locate one additional relevant source, create an annotated bibliography, and formulate a thesis statement. In LRA 4, they practiced bibliographic and footnote formats and drafted an outline for their final papers. By this point, they were required to have completed their research by locating at least one primary source (in addition to the source originally provided), two journal articles, and two monographs. Finally, with LRA 5 they completed and submitted the final paper.

The authors concluded that it was helpful to use the scaffolded approach outlined above. Giving students multiple discrete steps, rather than one final due date, successfully guided them to avoid procrastinating and engage with the assignment throughout the term. It also provided periodic opportunities for the professor to assess their progress and provide feedback. Therefore, the authors have chosen to continue this strategy when another partnership presents itself. However, it was felt that less time between the due dates of each step should be the practice. The LRAs were typically due about three weeks apart and it seemed that some of the students had trouble retaining the research skills from step to step, LRA to LRA. For example, some students engaged primary sources in LRA 1 and 2, but abandoned those sources by LRA 3. At that point, around two-thirds of the way into the

semester, the professor then had to remind the students of the assignment guidelines, and review definitions of primary and secondary sources. Thus, one adjustment for future courses is to make the research process more compact with less time between each step to help students maintain a steady level of engagement throughout the project.

Secondly, the authors found the hands-on research practice to be helpful. As mentioned earlier, an entire class period early in the semester was set aside for the students to get acquainted with primary sources and library search tools. This session, led by the librarian, featured a presentation on primary sources, physical examples of primary sources (such as university records or old yearbooks), and practice using relevant search tools. Students were quite encouraged by the library tutorial, especially the search tools, hence hands-on experience is a practice worth continuing.

However, it seemed that many students had difficulty retaining and remembering the research skills later in the semester, weeks after the library session. The authors anticipated this might happen and encouraged students to see the librarian with questions, but many never did. A few students did follow up with the librarian and she was able to provide them with significant research assistance, but many others did not seek help until late in the semester, or not at all. This outcomes lends itself to another point for adjustment. Like Bahde's "History Labs" approach, the authors concluded that one library tutorial was simply not enough. Like any skill, using research tools and engaging with primary sources requires practice, and multiple research tutorials were needed to maximize the retention of knowledge. Moreover, the authors found that many of the students who needed the most guidance in navigating sources were the least likely to seek help. Thus, in the next iteration, a recurring research component will be implemented. The plan is to have six research labs during the semester, with three clustered near the beginning of the term and the other three near the end. Each lab will be integrated into the



class, therefore designated class meetings will include course content from the professor and research tutorial guided by the librarian.

The authors believe this approach will enable the reiteration of primary source literacy and research skills in a way that mitigates short-term memory. It also ensures that all students have ample time to get research training, even if they are hesitant to ask for help. Using guidelines for information literacy and primary source literacy, the librarian will develop a series of learning modules, one for each research lab, that the authors believe will produce better learning outcomes for the students. So, instead of 71 percent of the students effectively using primary sources, the hope is for 90 or 100 percent success rate next time.

The third insight from this experience pertains to what many have called the “imposter syndrome.” This is the feeling that one does not feel confident within an institution. Two psychologists, Pauline Clance and Suzanne Imes, first coined this term in 1978 and they described it as a feeling of “phoniness in people who believe that they are not intelligent, capable or creative despite evidence of high achievement” (Richards, 2015). Specifically, in an educational context, a professor with imposter syndrome might feel unqualified despite successfully passing a rigorous hiring process. Likewise, a student with imposter syndrome might feel like they do not deserve to be in college. In a research context, another manifestation of imposter syndrome can be a reluctance to seek help and meet with the librarian or instructor. This seemed to be a particular hurdle for some of the students in our project. There was likely a correlation between the students who did not show primary source literacy in their final papers and students who were especially to seek assistance.

The authors did not initially account for this, but will do so in future assignment designs to better engage all students. Although most people have likely felt anxiety about their academic abilities at some point, much research suggests “women, people of color, and first-generation college student” are “particularly prone to impostor syndrome” (Herrmann, 2016). For instance, a recent study from the University of Texas at Austin and published in the *Journal of Counseling Psychology* reiterated the salience of impostor syndrome for students of color and “suggests that the impostor phenomenon in some cases can degrade the mental health of minority students who already perceive prejudices against them” (Bauer-Wolf, 2017). Among students who struggled with the assignment, the professor had extensive interactions with two students of color. He concluded both were experiencing some degree of impostor syndrome, and were embarrassed to ask for help. This issue of impostor syndrome is another reason the authors have instituted the recurring research lab in future plans, in order to show anxious students the acceptability of seeking assistance from faculty and librarians.

The final insight was to implement a “no Google” policy. This also includes a ban on Wikipedia and general search engines, and a requirement that students only use resources in the university library. As mentioned above, part of LRA 1 asked students to use Wikipedia to help generate research questions. This was done to allow students one opportunity to use Google and Wikipedia, and a opening to explain that such tools are acceptable for preliminary research, but inappropriate for in-depth research. While the authors still believe that explain how Google and Wikipedia should and should not be used is a valuable point for students to learn, the result of including that step in the assignment was counterproductive. The professor found that some students would return to Google throughout the project when library resources did not immediately appear fruitful. Instead of asking for help or practicing new skills, these students turned to Google as a familiar and convenient crutch. Thus, it was determined that including Google and Wikipedia in the assignment inhibited research skill-building.

Thus, for future projects, the authors will expressly exclude Google, Wikipedia, and similar popular search engines from the assignment. This better ensures that students will practice a broader range of research techniques and utilize the research labs.

## **Conclusion**

In conclusion, the authors' main goal was to promote broader information literacy by teaching specific skills about primary source literacy. The 2017 Guidelines for Primary Source Literacy provided the impetus for a collaborative project that gave increased focus on the teaching of certain skills, and the assessment of those skills using an informed pre- and post-survey instrument. While it is likely that the librarian and professor would have collaborated on a project of this nature anyway, being able to utilize and assess the Guidelines gave the project added focus. The largest impact was felt through the authors' assessment of both the survey data and the resulting student papers. Seeing that some improvement occurred in primary source literacy over the course of the semester, but also knowing that much more improvement had been desired, the authors have now committed to a new collaboration that will involve not one librarian-led instruction session, but rather six sessions. It is hoped and expected that this increase in instruction and student practice will lead to greater facility with primary sources, along with more dramatic growth in understanding, as demonstrated by the as-yet-to-be-administered post-survey. As students become adept at using and interpreting primary sources, they will have acquired valuable skills that will serve them well in today's information climate.

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