

Primary Source Learning for K-12 Students and Educators: Rethinking the Role  
of the Archive

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by  
Paige E. Bartello  
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Thesis Approvals:

Seth C. Bruggeman, Thesis Advisor, Chair, Department of History  
Hilary Iris Lowe, Department of History  
John Smith, External Member, Chester County Archives

## **ABSTRACT**

Over the last 20 years, archivists have been increasingly concerned with the role of archives in the teaching of primary source material to K-12 students. The Common Core State Standards, or CCSS, emphasizes the need for the mastery of reasoning skills and the importance of inquiry-based learning, making the archive a vital resource for teachers. The Society of American Archivists' Guidelines for Primary Source Literacy opens the door for collaboration between archivists and K-12 educators, but more explicit guidelines are needed for young learners. This paper discusses the strengths and weaknesses of the SAA Guidelines for Primary Source Literacy and provides a companion guide targeted at K-12 students and educators that focuses on collaboration and archival thinking.

For Jerry Bartello Sr.

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## INTRODUCTION

Over the last 20 years, archivists have been increasingly concerned with the role of archives in the teaching of primary source material to K-12 students. The Common Core State Standards, or CCSS, emphasizes the need for the mastery of reasoning skills and the importance of inquiry-based learning, making the archive a vital resource for teachers. However, the collaboration between archivists and K-12 teachers is not perfect, and there is no single consensus as to how primary sources can most effectively be taught to young learners. It seems that every aspect of primary source literacy has been picked apart by archivists, and despite a lack of singular consensus in the scholarship, best practices have been published in a guide by the Society of American Archivists (SAA) in conjunction with the Association of College & Research Libraries (ACRL) and the Rare Books and Manuscripts Section (RBMS) of the American Library Association. Although SAA asserts that their guidelines are not explicitly intended for K-12 use, they provide general educational policies that are meant to be applicable across a range of learning environments. However, the SAA guide is lacking in broad concepts that archival scholars have championed as the most important aspects of primary source learning. Referencing other works, it would be beneficial to add more explicit guidelines that emphasize including information about the archival profession, collaboration between educators and archivists, and creating a participatory and contextualized experience for students. A deeper exploration of the relationship between archives and K-12 education is thus required.

## BACKGROUND

The push for archivists to act as educators is not an entirely new phenomenon. In “Pedagogue in the Archive: Reorienting the Archivist as Educator,” James Roussain presents that Hugh Taylor first addressed the issue of opening collections to novice students at the annual SAA meeting in 1971.<sup>1</sup> Taylor followed that with an article in 1972 titled “Clio in the Raw: Archival Materials and the Teaching of History,” in which he argued that archivists must play an active role in teaching.<sup>2</sup> Taylor also argued that students should interact with archival material and be allowed to formulate their own conclusions based on firsthand experiences with primary sources.<sup>3</sup>

Following Taylor’s work, Ken Osborne dissected the relationship between teachers and archivists in his 1986 article “Archives in the Classroom.”<sup>4</sup> Osborne called for lessons geared towards teaching about the role of archivists, as well as collaboration between archivists and educators towards student-made exhibitions and student-led archival research.<sup>5</sup> Despite this vigor for archival learning in the classroom in the 1970s and 1980s, the discussion of primary source integration for K-12 students as it involves the archive is largely absent until the early 2000s.

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<sup>1</sup> James Roussain, “Pedagogue in the Archive: Reorienting the Archivist as Educator,” *Archivaria* 90, no. 1 (2020): 73.

<sup>2</sup> *Ibid.*, 72.

<sup>3</sup> *Ibid.*, 74.

<sup>4</sup> *Ibid.*, 75.

<sup>5</sup> *Ibid.*

Roussain goes on to argue that it is only in the last 10 years that college and university archivists have integrated instruction into their professional practice.<sup>6</sup> The SAA Guidelines for Primary Source Literacy were not published until 2018, and there is no evidence online that a previous iteration of the guidelines existed. Projects published online involving K-12 students and archives are also newer, with most being published in the last 10 to 15 years.

One example of K-12 students engaging with the archive is the Archive-It website, developed by the Internet Archive in conjunction with the Library of Congress. The K-12 Web Archiving project helped students from schools across the country to create their own web archive pages. Students used the Wayback Machine to save web pages they felt should be preserved for the future.<sup>7</sup> The Wayback Machine captures what a website looked like at a given moment in time, and by using the calendar function users can jump to previous iterations of a site, even if they have been changed or removed in the present. This project allowed students to make their own decisions about what is kept for posterity and gave them the opportunity to create their own history. Although the project appears to have ended in 2014, the model still exists online and could easily be used for future projects in schools.

The Mississippi Department of Archives and History (MDAH) has also developed archival resources to be used in the classroom. Teachers can request a traveling trunk that includes: a teacher's notebook and lesson plans; reproduction artifacts; maps, graphics,

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<sup>6</sup> Roussain, "Pedagogue in the Archive," 83.

<sup>7</sup> "About the Program," Archive-It K-12 Web Archiving, <https://archive-it.org/k12/introduction.html>.

films, and music; games and crafts; activity sheets, student reading material, and discussion questions; and reference materials.<sup>8</sup> Some trunks available include sources on the Mississippi River and climate control in the nineteenth century. The traveling trunks are available free of charge and can be shipped directly to schools, minimizing the extra work teachers must undertake in order to teach primary sources. These traveling trunks are an ideal way to teach primary source and archival literacy in schools that may not be close to or have the resources to visit an archive. While reproduction artifacts are an imperfect substitute, they allow students to safely interact with objects and get the next best experience, rather than being confined to looking at flat objects in a textbook. MDAH also has an Outreach Programs Coordinator that can assist teachers in using their trunks.

These projects show that K-12 primary source learning can be positively impacted by the relationship between educators, students, and archives. The missing link, then, is the right encouragement and suggestions for collaboration. The SAA Guidelines for Primary Source Literacy, if amended, can serve as the bridge to effective primary source learning for K-12 students.

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<sup>8</sup> “Traveling Trunks,” Mississippi Department of Archives and History, <https://www.mdah.ms.gov/traveling-trunks>.

## PRIMARY SOURCE LITERACY: OPPORTUNITIES FOR IMPROVEMENT

The SAA Guidelines for Primary Source Literacy, developed in 2018, is divided into four categories spanning 20 pages: an introduction; core ideas; learning objectives; and appendices including a glossary of terms, an annotated bibliography, related resources, and background information on the developers of the guide. The introduction ventures to describe the importance of primary sources and the skills that working with primary sources develop. It also establishes the aim of the guidelines to “articulate crucial skills for navigating the complexity of primary sources and codify best practices for utilizing these materials.”<sup>9</sup> They attempt to describe what primary sources are, while leaving room for broad interpretation, as well as discuss the intersection of primary source literacy with other skills and disciplines.<sup>10</sup> In the conclusion to the introductory section the authors also suggest that these guidelines are “a catalyst for communication among librarians/archivists and faculty/teachers.”<sup>11</sup>

The SAA guide then goes on to discuss the core ideas attached to primary source learning. The core ideas include analytical concepts, ethical concepts, theoretical concepts, and practical considerations.<sup>12</sup> The analytical concepts cover skills such as analysis, critical thinking, interpretation, and evaluation, as well as interrogation of

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<sup>9</sup> “Guidelines for Primary Source Literacy,” *Society of American Archivists*, June 2018, 1.

<sup>10</sup> *Ibid.*, 2.

<sup>11</sup> *Ibid.*, 3.

<sup>12</sup> *Ibid.*, 3-4.

materiality, context, and narrative.<sup>13</sup> Ethical concepts include considerations such as privacy rights, cultural context, donor agreements, and copyright.<sup>14</sup> The section on theoretical concepts discusses societal power structures, silences and absences, power and authority, and agency and privilege, as well as the mediation of collections and databases from their original contexts to their place in the archives.<sup>15</sup> Finally, the practical considerations include brief mention of the skills needed to find, access, and handle materials in an archival setting.<sup>16</sup>

In the next section, SAA tackles the learning objectives for primary sources. However, the introduction to the section details more about what the objectives *are not*, rather than what they *are*. The authors state, “These objectives are intended to be illustrative and are neither comprehensive nor prescriptive, and are *not* presented in any natural order of progression of skill acquisition. They do not specify measurable outcomes or benchmarks for instruction, but can be of assistance in articulating specific learning goals that can be assessed.”<sup>17</sup> The following section establishes that someone knowledgeable in the use of primary sources can conceptualize; find and access; read, understand, and summarize; interpret, analyze, and evaluate; and use and incorporate sources.<sup>18</sup>

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<sup>13</sup> “Guidelines for Primary Source Literacy,” *Society of American Archivists*, June 2018, 3.

<sup>14</sup> *Ibid.*

<sup>15</sup> *Ibid.*

<sup>16</sup> *Ibid.*, 4.

<sup>17</sup> *Ibid.*, 4.

<sup>18</sup> *Ibid.*, 5-6.

Following the learning objectives is seven pages on archival and primary source terms, and an annotated bibliography for further reading. The third appendix includes three related resources, two of which being ACRL pages on information literacy and competency standards for higher education, and the third being a link to the SAA Teaching with/about Primary Sources committee.<sup>19</sup> The glossary of terms is something that K-12 educators and teaching archivists could use in primary source lesson plans, but the related resources are tangential and not readily applicable to K-12 standards. The annotated bibliography includes some potentially helpful sources, but is overall not helpful to the educator that does not have the time to devote to in-depth analysis of 12 separate articles and full-length books.

The SAA guidelines do not field suggestions for the teaching of primary sources, and does not discuss the variable needs of archivists and educators engaged with K-12 audiences. The guidelines are meant to be vaguely applicable to all spheres of learning, but are mostly directed at higher education, and do not discuss how primary sources interact with Common Core State Standards. It is important to explore and expand upon the unique needs and requirements involved with K-12 primary source literacy, and referencing other archival scholars, it bears in mind that SAA should consider an additional set of guidelines meant specifically for K-12 audiences. The guidelines in their current iteration are negligent of the myriad questions and obstacles brought forth by primary source literacy and the archive, and require further development.

One question archivists must first tackle is, why are teachers disinclined to use archives in their teaching? The answer is multifaceted, but often circles back to the often-

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<sup>19</sup> “Guidelines for Primary Source Literacy,” *Society of American Archivists*, June 2018, 18.

time-consuming nature of teachers' duties. In "Accessing Archives: Teaching with Primary Sources in K-12 Classrooms," Patricia Garcia notes that most teachers are not interested in having students learn about generalized research techniques in archives in manuscript collections, instead they "are primarily interested in receiving preselected and digitized primary source sets that can be used to create learning exercises that promote critical thinking skills."<sup>20</sup> Especially in lower grades, teachers are often responsible for teaching more than one subject, and in turn require pre-made lesson plans and primary source packets to save time. Unfortunately, these pre-packaged lessons often come from textbooks and lack context that is vital to students' full understanding of the complexities of archival material. Garcia goes on to note that "although teachers are aware that Common Core State Standards 'are here to stay,' they do not necessarily feel well prepared to implement them."<sup>21</sup> David C. Ensminger and Michelle L. Fry discuss similar blocks to teacher involvement in their article, "A Conceptual Framework for Primary Source Practices." They write, "Many teachers lack the knowledge and skills needed to use primary sources properly. This lack of knowledge and skills often results in the 'tacking on' of primary sources to instruction versus the use of them as tools to facilitate the initial learning of content or enhancing students' critical thinking."<sup>22</sup> Teachers left to incorporate primary source learning entirely on their own unfortunately need to seek out shortcuts in order to meet learning goals and fulfill the other multiple responsibilities

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<sup>20</sup> Patricia Garcia, "Accessing Archives: Teaching with Primary Sources in K-12 Classrooms," *The American Archivist* 80, no. 1 (2017): 192.

<sup>21</sup> Garcia, "Accessing Archives," 205.

<sup>22</sup> David C. Ensminger and Michelle L. Fry, "A Conceptual Framework for Primary Source Practices," *The Educational Forum* 76, no. 1 (2012): 119.

related to their positions. Therefore, the list of related books and articles at the end of SAA's guide is not an effective means of educating teachers or involving them in the archives. Archival education needs to be integrated into the guide itself, rather than the current use of the guide as a venue for links to outside reading.

In addition to a lack of time, teachers and schools are often faced with a lack of resources when it comes to primary source integration. In "An Exploration of K-12 User Needs for Digital Primary Source Materials," Anne J. Gilliland-Swetland writes, "schools are struggling with the realities of insufficient availability of equipment; inequity of access, even between students in individual classes; and teachers who are lacking in technological skills."<sup>23</sup> Ensminger and Fry note that in many cases, teachers need to take students on field trips or bring in guest speakers, and these are not always viable options for schools lacking in resources.<sup>24</sup> On the opposite end, archives may not have the capacity to provide adequate services to teachers and students. In "Archives in the Classroom," Ken Osborne points out that "The problem has not been one of ideas or intentions but of resources and mechanisms – or the lack of them."<sup>25</sup> Osborne goes on to argue:

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<sup>23</sup> Anne J. Gilliland-Swetland, "An Exploration of K-12 User Needs for Digital Primary Source Materials," *The American Archivist* 61, no. 1 (1998): 138.

<sup>24</sup> Ensminger and Fry, 119.

<sup>25</sup> Ken Osborne, "Archives in the Classroom," *Archivaria* 23, Winter (1986): 27.

...it does not matter even if documents are there ‘for the asking’ if teachers and students have not properly prepared themselves and if there has not been adequate prior consultation between teachers and archivists. And even then it is far from certain that archives have the staff, the time, the educational expertise, or certainly the physical space to cope with the demands of schools.<sup>26</sup>

Even with the best of intentions towards integrating primary source material, there are often significant obstacles that archivists and teachers face individually. However, scholars argue that a collaborative approach between educators and archivists can help to bridge some of these gaps. This argument is absent from the SAA guides as well, and they do not address potential inequities that may block access to primary source learning. It is simply assumed that students and educators have easy access to archival material and equal opportunities for learning.

It is generally agreed upon that archivists and educators each have unique skill sets that lend themselves to the effective teaching of primary sources to students. Garcia notes that “teachers are not trained in archival theory and practice and archivists are not trained to appraise materials for pedagogical value.”<sup>27</sup> Therefore, a collaborative approach is necessary to create a more holistic learning plan. Garcia borrows Elizabeth Yakel and Deborah A. Torres’ three distinct forms of knowledge required to work effectively with primary sources: domain knowledge, or subject knowledge; artifactual literacy, or the ability to interpret records and assess their value as evidence; and archival intelligence, or knowledge about the environment in which the search for primary sources

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<sup>26</sup> Osborne, “Archives in the Classroom,” 27.

<sup>27</sup> Garcia, “Accessing Archives,” 192.

is being conducted.<sup>28</sup> The SAA guide ventures to address differing forms of knowledge in the sections on core ideas and learning objectives, and that is something that can be expanded upon using Garcia, Yakel, and Torres' works. Garcia continues, "Teachers who have not been trained to undertake historical research often have domain knowledge of the subject being researched but lack the archival literacy to identify academically appropriate materials within a larger body of archival materials that is arranged according to the principle of provenance 'as opposed to being categorized according to subject'."<sup>29</sup> Therefore, before teachers can effectively impart primary source skills onto their pupils, they must first become versed in archival methods. This is a concept that is entirely absent from the SAA guide, and a glance at the section on the members appointed to create the guide reveals that no educators were consulted during the creation process, leaving the guide unfortunately lacking in terms of educators' perspectives and unique knowledge.

Without the proper archival skills, teachers run the risk of presenting decontextualized documents, and in turn "presenting students with incorrect interpretations and representations of archival materials, especially when dealing with the records of historical figures whose views on issues often evolved."<sup>30</sup> Julia Hendry also warns against the isolation of documents by teachers lacking archival literacy in "Primary Sources in K-12 Education: Opportunities for Archives." She writes, "...educators do not seem to be concerned with considering individual documents in relation to the archival

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<sup>28</sup> Garcia, "Accessing Archives," 196.

<sup>29</sup> Ibid., 192.

<sup>30</sup> Ibid., 202.

collection as a whole or even considering the archival collection as the unit of study. This may be, in part, because they are seeking to prepare their students to answer [Document Based Questions], which also rely on a small number of documents out of context.”<sup>31</sup> There is an unfortunate trend in K-12 education to teach for standardized tests, and test questions influence teachers to “not ask students to look deeper into issues of authenticity – they do not ask questions about the provenance of a document or collection nor do they wonder if there might be gaps in the custodial history that would call the authenticity of a document into question.”<sup>32</sup> The SAA guidelines are on the right track by emphasizing the importance of provenance, context, and other theoretical considerations, but these concepts need to be taken a step further in order to effectively underscore the nuances of primary source documents. SAA is in a position where they have unique understanding of the power of documents and the benefits of thinking archivally, but that is something that needs to be expanded to address K-12 learners and educators.

On the opposite side, archivists generally lack the proper training to evaluate holdings for pedagogical value and thus require the collaboration of educators to create the most effective lessons for students. This is something that is also woefully ignored in the SAA guide. Archival training does not stress the need to accommodate children’s imagination, attention spans, or reading levels in programming, and this is something teachers could be instrumental in supplementing with their unique professional skills.<sup>33</sup> In

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<sup>31</sup> Julia Hendry, “Primary Sources in K-12 Education: Opportunities for Archives,” *The American Archivist* 70, no. 1 (2007): 124-125.

<sup>32</sup> Hendry, “Primary Sources in K-12 Education,” 125.

<sup>33</sup> *Ibid.*, 126.

“The Archivist as Educator: Integrating Critical Thinking Skills into Historical Research Methods Instruction,” Marcus C. Robyns claims, “Despite the fact that critical thinking skills are a fundamental component of research in primary sources, many archivists have argued that being a teacher goes beyond the mandate of archival management and that the responsibility for teaching thinking and research skills should be left to properly trained faculty.”<sup>34</sup> However, this isolationist viewpoint is detrimental to the overall use of archival material in the classroom. While archivists do not have the educational background to provide sufficient learning opportunities for students, they do have the skills to train teachers and students how to think archivally. Hendry also points out: “Archivists and special collections on university campuses typically offer classes aimed at graduate students, often in history, to inform students of the repository’s holdings and to give advice on doing archival research.”<sup>35</sup> This approach could easily be modified to accommodate pre-service and in-service teachers, just as the SAA guidelines can be modified to think outside of primary source literacy as it exclusively relates to higher education.

Collaboration with educators also generates the most fruitful lessons for young learners. In “Archivists as Educators: Integrating Primary Sources into the Curriculum,” Peter Carini argues that there needs to be a step away from archival neutrality and recognition that archivists are “guides who are uniquely qualified to teach those unfamiliar with primary sources how to use, judge, and evaluate these materials for

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<sup>34</sup> Marcus C. Robyns, “The Archivist as Educator: Integrating Critical Thinking Skills into Historical Research Methods Instruction,” *The American Archivist* 64, no. 2 (2001): 364.

<sup>35</sup> Hendry, “Primary Sources in K-12 Education,” 128.

themselves.”<sup>36</sup> Osborne points out that “the lack of useful and usable teaching materials which are both interesting and practical is one important problem and it is one that archivists can help to correct.”<sup>37</sup> Archivists have the best knowledge of what is in their holdings, and although they may not know the best sources to use for young learners, they can present educators with options and help guide them through the selection process. Osborne also notes, “Sometimes the best or most representative document from a historical viewpoint is not the best for teaching.”<sup>38</sup> Therefore, it is crucial that archivists interact with educators and vice versa during the development of primary source lessons. Similarly, it would be prudent for SAA and ACRL/RBMS task force members to interact with educators as they venture to establish guidelines for primary source education. It would also be valuable to identify the types of materials that may be the most fruitful for students, in order to give educators a jumping-off point for their own archival research.

Finally, archivists are in an important position to impart onto students skills that go beyond the critical thinking requirements of state education mandates. Eleanor Dickson and Matt Gorzalski emphasize the necessity of teaching about the archival profession in primary source lessons, not just to benefit archives, but to benefit students as well. They point out that “traditional archival outreach methods for K-12 students teach children how to be historians—not archivists—by emphasizing critical thinking

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<sup>36</sup> Peter Carini, “Archivists as Educators: Integrating Primary Sources into the Curriculum,” *Journal of Archival Organization* 7, no. 1-2 (2009): 49.

<sup>37</sup> Osborne, “Archives in the Classroom,” 18.

<sup>38</sup> *Ibid.*, 35.

skills and document analysis.”<sup>39</sup> The article goes on to point out that many schools that interact with primary source documents are isolated from the repositories that they come from. However, if archivists work to demystify the profession and describe records management in positive and understandable terms, it “has the potential to engender better community relationships, as well as result in more diverse acquisitions and increased funding.”<sup>40</sup> Osborne also notes that “students best learn the ‘proper conservationist attitude’ not from exhortations, warnings, or threats, but by the visible example of the care taken in the handling of documents and of the precautions that archives take.”<sup>41</sup> Thus, direct involvement of archivists and students is crucial to the future of archives and the interests of students. The SAA guidelines discuss the need for students to be able to find and access documents, but it leaves out interaction with archivists and the value archivists have in students’ education. The guidelines approach primary sources as though they are in a vacuum, and archivists are unfortunately left out of a conversation that they are inherently a central part of.

Beyond teaching about the function of archives, encouraging student participation in the archives can serve to benefit students and archival institutions. In “Seen but Not Heard: A Case Study of K-12 Web Archiving and the Importance of Student Participation in the Archives,” JoyEllen Freeman argues that participatory archiving

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<sup>39</sup> Eleanor Dickson and Matt Gorzalski, “More Than Primary Sources: Teaching About the Archival Profession as a Method of K-12 Outreach,” *Archival Issues* 35, no. 1 (2013): 7.

<sup>40</sup> *Ibid.*, 9.

<sup>41</sup> Osborne, “Archives in the Classroom,” 31.

“develops critical thinking and technical skills that complement current state-level education standards.”<sup>42</sup> She goes on to write:

Under the Common Core standards, middle and high school students must analyze primary and secondary source documents as an integral part of the social studies curriculum. Likewise, Common Core standards require students in all grades to master reading skills for informational texts. Using primary sources satisfies this requirement because it helps students comprehend, critique, and integrate information from various sources.<sup>43</sup>

Hendry also argues for the importance of archival skills to students outside of primary source learning. She writes, “The Internet, with its vast quantities of unvetted data, has become the first place many people look for answers, so that habits of questioning, evaluating, and assessing information are particularly important for students to acquire as part of their basic education.”<sup>44</sup> By allowing students to actively participate in archival learning, rather than having archival knowledge imparted on them, they will have a greater appreciation for historical documents and develop other healthy learning habits that will cross over to other aspects of their education. In “Teaching Archive Skills: A Pedagogical Journey With Impact,” Karen Watson and Kirsty Patrick emphasize that “By handing the power of discovery and investigation back to the student, they are enabled to make their own decisions regarding the document and its usefulness, and this can feed into a student’s self-confidence and motivation towards the subject.”<sup>45</sup>

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<sup>42</sup> JoyEllen Freeman, “Seen but Not Heard: A Case Study of K-12 Web Archiving and the Importance of Student Participation in the Archives,” *Archival Issues* 37, no. 2 (2016): 24.

<sup>43</sup> *Ibid.*, 26.

<sup>44</sup> Hendry, *Primary Sources in K-12 Education*, 119.

<sup>45</sup> Karen Watson and Kirsty Patrick, “Teaching Archive Skills: A Pedagogical Journey with Impact,” *The Journal of the Archives and Records Association* 41, no. 2 (2020): 174.

Along with getting students more involved with participatory learning through hands-on activities and processes of investigation Rebecca Hankins argues, “Studies have shown that connecting students with resources that they can relate to in their everyday experiences has a more significant impact on their lifelong learning.”<sup>46</sup> The SAA guidelines neglect the long-term impact of effective primary source teaching on students, as well as the merits of physical versus digital materials, and these are things that can be discussed in the guide in order to convince larger audiences of the importance of the archive in K-12 education as they relate to Common Core goals and standards. On the other hand, SAA would benefit archives and archivists by championing the relationship between archival institutions and educators because these relationships could serve to benefit as far as resources go in the future.

The question remains, however, as to how to effectively integrate all best practices of archival literacy teaching into real-life lesson plans. The resources and time necessary to fulfill all of the suggestions made by scholars above is daunting, to say the least. It is evidently crucial that archival literacy and primary source learning be collaborative, participatory, and more archivally, rather than historically, minded. While not being able to tick off every box, it remains possible for archivists to expand their user base and promote the use of their collections through educators and K-12 students. The above issues are almost entirely absent from the SAA Guidelines for Primary Source Literacy, and their inclusion would do much to increase the use of archives by K-12 students and educators. Primary school teachers are stretched thin when it comes to time

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<sup>46</sup> Rebecca Hankins, “Information Literacy and Instruction: Embracing Informational and Archival Literacies: Challenges and Successes,” *Reference and User Services Quarterly* 58, no. 3 (2019): 154.

and resources, and increased efforts from SAA to provide more in-depth guidelines would go a long way towards actual implementation of archival material in curricula, rather than the standard out-of-context textbook examples. It is the onus of the archival community, in conjunction with educators, to make archives accessible for pedagogical use, and while strides have been made in the scholarship, real-life ready-to-use examples are in short supply. SAA does not claim to have perfect definitions or all-encompassing discourse related to primary source learning, and this same approach can be used to provide more in-depth tools. There will likely never be a perfect consensus as to how primary source literacy should be appropriately taught, but SAA can help lead the way towards a more collaborative and accessible approach to K-12 learning.

## METHODS

In an effort to tailor the SAA's guidelines for K-12 educators I have developed a companion to the pre-existing guide. This guide is not meant as a replacement for SAA's guide, but rather a tool for those looking to use primary sources outside of a higher education setting. Aspects of the SAA guide remain valuable: the resources, definitions, and learning goals. However, they are insufficient for the busy K-12 educator looking to move beyond primary sources found in textbooks.

Firstly, the relationship between archivists and educators should be championed. Once the importance of a collaborative approach is established, then suggestions for lessons can be made. Special attention must be paid to the deficits in the SAA guide discussed above, such as emphasis on archival knowledge as a part of primary source literacy and the differences between digital and physical interactions with archival materials.

The SAA guide does not provide examples or resources for teachers looking to get a jump start on archivally-minded primary source learning. In the companion guide there are several links to websites and projects developed with K-12 students in mind, giving teachers that are feeling overextended easy-to-use alternatives if the suggestions for collaboration are not immediately achievable. I felt it important to also include a few links for outside reading. While it may not be entirely practical for educators to pore through all of the articles, they may provide deeper insight or inspiration to those wanting to delve deeper into teaching with archives.

Special attention was also paid to brevity, as the SAA guide is already lengthy and a companion need not be too wordy, potentially deterring busy educators. Brief emphases on important archival issues as they relate to K-12 education with resources for development make an important point, but also allows for a quick read.

## **K-12 PRIMARY SOURCE GUIDELINES FOR EDUCATORS: A COLLABORATIVE APPROACH**

### **Introduction**

The SAA describes primary sources as “materials in a variety of formats that serve as original evidence documenting a time period, an event, a work, people, or ideas.”<sup>47</sup> Primary source literacy consists of “the combination of knowledge, skills, and abilities necessary to effectively find, interpret, evaluate, and ethically use primary sources within specific disciplinary contexts.”<sup>48</sup> As a part of the Common Core State Standards (CCSS), primary sources are a useful tool for K-12 educators seeking to develop critical thinking skills in students. The archive and the archivist are thus integral to effectively integrating these sources and developing student primary source literacy.

This guide is intended to accompany the SAA guide on primary source literacy, with the goal in mind to encourage educators and archivists to work collaboratively. Archives and archivists hold vital untapped information that can aid educators in navigating effective primary source learning while adhering to CCSS.

### **Engaging with Archivists: Advantages**

Archivists are experts in their holdings and should be the first stop for educators looking to integrate primary source material. Many archives have pre-selected digitized materials and lesson plans for teachers that feel they do not have the spare time to sift through mountains of content. It is also not always practical for students to engage with archives in-person during these difficult times, and engaging with an archive online is an easy way to elevate engagement without sacrificing quality of learning. Too often

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<sup>47</sup> “Guidelines for Primary Source Literacy,” *Society of American Archivists*, June 2018, 1.

<sup>48</sup> *Ibid.*

textbooks use pre-packaged, static, examples of primary sources and using materials from an archive, whether physical or digital, is a beneficial way to avoid the bias of an unchanging tome.

While some may have to find digital alternatives, real-life interaction with an archive is invaluable for young learners. It is important to keep in mind that digital archives are not always tailored to a K-12 audience and may require some tweaking for effective use in the classroom. Archivists, in conjunction with educators, are able to pull materials that conform specifically to students' current curricula and learning goals. Some materials may also be available for students to interact with hands-on, allowing for tactile learning as well as a deeper understanding of a photograph or document. Collaboration between the educator and archivists allows for the most personalized lessons possible while also promoting education about the archive, another vital aspect of primary source literacy.

### **Learning About Archives: What's the Value?**

More often than not, primary sources are taught in schools without consideration to the function of archives as the repositories for materials. Students leave with developed skills in critical thinking but lack the knowledge to access primary sources in the future; in short, they learn to think historically and not archivally. Students are done a disservice by handing them primary sources without being given the adequate knowledge of where they are housed or who are their stewards. Archivists are the most qualified to explain the provenance of materials and how this potentially alters the meaning of photographs and documents in the collection. Rather than viewing sources in isolation, viewing materials as a part of a larger collection offers insight into the life of a document over the *longue durée*, illuminating potential biases.

## **Options for Collaboration**

There are a number of methods both teachers and archivists can employ to overcome hurdles regarding teaching primary source literacy. It is important to note that all learning environments are not equal, and a flexible combination of approaches may best suit differing situations.

The first step is interaction between the educator and the archivist. Educators should lay out learning goals and describe students' familiarity with primary sources in order for the archivist to better understand the materials needed. If possible, the archivist should meet with students or discuss with the educator background on the function of archives before students interact with materials. It is important to build a foundation regarding the multiple functions of archives and how they can benefit students' research in the future. From there, it is ideal that students are able to interact with primary source materials in-person. If not, online resources should include information about the provenance of materials discussed and what their places are as a part of a larger collection. First person encounters with primary source material not only enhances learning, but allows students to feel empowered and engaged with the lesson being taught.

Beyond the base-level interactions between students and archives, there are also opportunities for further projects benefitting both K-12 schools and local archives. Students can engage in public history projects using archival materials, and these projects can serve as learning tools for future students. It is important to have the local community involved with state and local archives, and these collaborations can serve as a springboard for further interactions.

## Archives Offering Online Primary Sources and Lesson Plans for K-12 Students:

### DocsTeach – Provided by the National Archives:

- <https://www.docsteach.org/>
  - This website provides primary source documents geared towards primary source learning, as well as pre-made activities and a program for teachers to develop their own activities online.

### Library of Congress:

- Curated Primary Source Sets: [https://www.loc.gov/classroom-materials/?fa=partof\\_type:primary+source+set](https://www.loc.gov/classroom-materials/?fa=partof_type:primary+source+set)
- Free to Use and Reuse Sets: <https://www.loc.gov/free-to-use/>
- Web Guides: <https://www.loc.gov/rr/program/bib/bibguide.html>
- Creating a Primary Source Archive: <https://www.loc.gov/classroom-materials/creating-a-primary-source-archive-all-history-is-local/>
  - This collection of websites includes curated classroom materials that are ready to use, as well as a guide to digital resources grouped by subject and a step-by-step lesson plan for teachers that want to create a primary source archive with their students.

### Smithsonian Learning Lab:

- [https://learninglab.si.edu/search/?f%5B\\_types%5D%5B%5D=ll\\_collection&subjects%5B%5D=115845&s=updated\\_at\\_desc&page=1](https://learninglab.si.edu/search/?f%5B_types%5D%5B%5D=ll_collection&subjects%5B%5D=115845&s=updated_at_desc&page=1)
  - The Learning Lab provides curated collections of primary sources grouped by topic, age level, and school subject for easy navigation.

### Teachinghistory.org – Provided by the National History Education Clearinghouse:

- <https://teachinghistory.org/teaching-materials>
- <https://teachinghistory.org/best-practices/using-primary-sources/24491>
  - Teaching History provides lesson plans, teaching guides, and primary sources, as well as rubrics for evaluating the pedagogical value of sources.

### Articles on Archival Primary Source Learning for K-12 Students:

Ensminger, David C. and Michelle L. Fry. “A Conceptual Framework for Primary Source Practices.” *The Educational Forum* 76, no. 1 (2012): 118-128.

Garcia, Patricia. “Accessing Archives: Teaching with Primary Sources in K-12 Classrooms.” *The American Archivist* 80, no. 1 (2017): 189-212.

Osborne, Ken. “Archives in the Classroom.” *Archivaria* 23, Winter (1986): 16-40.

## CONCLUSION

The current relationship between educators and archivists is one that needs fostering and encouragement to grow. As it stands, the SAA Guidelines for Primary Source Literacy provide an important base-level introduction to teaching primary sources, but leaves out an important demographic: K-12 students and educators. With a companion guide, such as the one provided in this paper, educators and archivists can make inroads into deeper levels of collaboration for the benefit of students and local archives.

With an enhanced emphasis on archival methods and functions, students can develop skills that go beyond critical thinking tailored to standardized tests. Knowledge of archives allows for students to complete further research projects in the future as archivally-literate individuals. Once established, lesson plans for K-12 teachers can be reused and expanded over time to promote further involvement with the archive. The companion guide acknowledges potential inequities that may inhibit archival learning and offers solutions that include digital resources and online lesson plans curated by archives.

In the future it would be beneficial for SAA to collaborate with educators in order to develop a guide with more insight into the unique issues surrounding K-12 primary source literacy. For now, it is up to educators and archivists to collaborate on the teaching of archival resources to ensure the ultimate success of young learners.

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## APPENDIX

NOTE: Suggestions for revision appear in **red text**.

### **Guidelines for Primary Source Literacy**

Developed by the ACRL RBMS<sup>49</sup>-SAA<sup>50</sup> Joint Task Force on the Development of Guidelines for Primary Source Literacy

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#### **Introduction**

Primary sources provide compelling, direct evidence of human activity. Users who encounter primary sources gain a unique perspective on the subject they are studying, and an opportunity to learn firsthand how primary sources are used for original research. As users learn to successfully engage with primary sources, they also gain important skills that help them navigate the use of other information sources, and further develop their critical thinking skills. Primary sources can also be challenging to those who use them. The formats of primary sources may be unique and unfamiliar. They require critical analysis due to their creators' intents and biases; the variety of contexts in which they have been created, preserved, and made accessible; and the gaps, absences, and silences that may exist in the materials.

These guidelines articulate the range of knowledge, skills, and abilities required to effectively use primary sources. While the primary audience for this document is librarians, archivists, teaching faculty, and others working with college and university students, the guidelines have been written to be sufficiently flexible for use in K-12 and in general public settings as well. The guidelines articulate crucial skills for navigating the complexity of primary sources and codify best practices for utilizing these materials. **Insert text acknowledging the importance of archivist and educator collaboration for effective primary source learning.**

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<sup>49</sup> Association of College and Research Libraries' Rare Book and Manuscript Section. These Guidelines were approved by the ACRL Board of Directors in February 2018.

<sup>50</sup> Society of American Archivists. These Guidelines were approved by the SAA Council in June 2018.

Primary sources are materials in a variety of formats that serve as original evidence documenting a time period, an event, a work, people, or ideas. Primary source literacy is the combination of knowledge, skills, and abilities necessary to effectively find, interpret, evaluate, and ethically use primary sources within specific disciplinary contexts, in order to create new knowledge or to revise existing understandings. **Insert a discussion of digital versus physical documents and how that may affect learning experiences.**

This definition of primary source literacy, and the vision for this document, are deliberately broad. Defining the terms primary source literacy, primary source, or even source, is inherently problematic. The concept of what makes a source “primary” relies on the research question at hand, varies based on the discipline, depends on the interplay with secondary sources, and is subject to the different interpretive processes researchers bring to their projects. Research questions can develop out of encounters with primary sources, or primary sources can be used to refine or answer questions already developed. Primary source literacy is not a binary state, but rather exists across a spectrum. **Emphasize the importance of context when looking at primary source documents.** Furthermore, instructors who are teaching these skills may be simultaneously concerned with conveying the excitement of research with primary sources, or giving students a memorable or transformative experience while using such sources. Although important goals, these are abstract qualities that resist assessment and are not explicitly covered as part of these guidelines. **It is important to acknowledge here that educators are uniquely qualified to assess materials for their potential interest to students, and not simply pedagogical value. In order to effectively impart the importance of archival documents and archivists students must first have an interest in what they are learning.**

Primary source literacy intersects with other “literacies,” including information literacy, visual literacy, and digital literacy, and concepts like collective memory, cultural heritage, and individual/cultural perspectives. Thus, users of primary sources, and those who seek to guide them in the process, are not working in isolation from other skills and disciplines. **Discuss how primary source literacy interacts with Common Core guidelines.** To create order in this complex landscape, these *Primary Source Literacy Guidelines* identify core ideas that undergird successful work with primary sources, as well as more specific learning objectives to guide those who teach the use of primary sources. The *Guidelines* are intended to be flexible rather than prescriptive, and were developed in the spirit of the *ACRL Information Literacy Framework*, which articulates a set of interconnected core ideas, knowledge practices, and learning dispositions key to successfully navigating the information landscape more generally (see Appendix 3).

The following core ideas and learning objectives relate to primary sources in a variety of formats, including original artifacts, both physical and born-digital, and copies, whether digitized or in printed or analog format.<sup>51</sup> While some ideas may be more applicable for some formats, the document as a whole is designed with all formats in mind.

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<sup>51</sup> These guidelines are not intended only to be about using archives and special collections, although skills and objectives in the document are relevant to using special collections and archives. Nor are they guidelines for archival literacy.

The guidelines may be used as a whole or in part depending on particular learning needs and larger programmatic goals, and may be applied differently in different contexts. The core ideas may be used to facilitate discussions between librarians/archivists and faculty/teachers about what students can learn through incorporating primary sources into course curricula. Instructors, including archivists and librarians, may draw upon the learning objectives to develop significant learning experiences and assessment strategies and measures appropriate to their local needs and specific pedagogical aims. In addition to serving as a catalyst for communication among librarians/archivists and faculty/teachers, these guidelines may also be used to enhance general programming and skill building around primary sources. Students and researchers may also consult these guidelines to aid in their self-development in the use of primary sources. **It would be prudent to note that not all schools and students have equal access to sources and provide alternatives if in-person materials are not available.**

## **Core Ideas**

### Analytical Concepts

The nature of primary sources requires researchers to engage with them analytically. Users activate primary sources through hypothesis, analysis, synthesis, interpretation, critical thinking, and evaluation; they use sources to develop both questions and arguments. Primary source analysis requires the interrogation of materiality, historical context, and narrative. Users need to understand how sources were produced and delivered. Interpretation of sources occurs on a continuum from the creation of the source to its utilization by the current user, and includes mediation by librarians, archivists, and database creators or designers. Self-reflective users consider primary sources in the context of their own projects as well as their agency in creating new primary sources.

### Ethical Concepts

Users need to understand the ethical concepts related to applicable laws and regulations, privacy rights, cultural context, donor agreements, copyright, and intellectual property when working with primary sources. They must understand how these concepts affect their ability to use primary sources in their work, and they should responsibly consider how their scholarship may potentially affect the creators, donors, owners, and readers of these primary sources.

### Theoretical Concepts

Theoretical concepts such as evidence, authority, power, authenticity, context, materiality, historical empathy, agency, value, absences, and privilege underpin the collection, arrangement, and presentation of primary sources. Collections in cultural heritage institutions reflect and reinforce societal power structures. Users must seek to understand resulting silences and absences by critically considering what sources were never created, what sources may no longer exist, and what sources are collected, as well as communities' abilities to engage in these activities. The

iterative nature of research and the interplay between primary and secondary sources must also be considered throughout the research and production process as users seek to contextualize and understand their sources. Collections and databases are always mediated in some way, and exhibits, digital collections, and guides or other access tools reflect the selection, reproduction, and presentation decisions of many individuals<sup>52</sup> -- decisions that may not be self-evident.

### Practical Considerations

There are practical considerations particular to using primary sources that users should be aware of. Practical skills necessary for primary source research include finding, accessing, gathering, and handling primary sources in a variety of formats and locations. In order to reach their goals, users should understand what is and is not accessible in specific institutions or databases, and must be aware of procedures and terminology specific to primary source research that may vary from institution to institution. They will need to be aware of how these sources are described in familiar search tools, and may need to engage with additional tools developed in a repository to provide access to primary sources. They will need strategies for capturing and managing research data, including transcription, photography, and downloads. **Once again, issues of equity and access should be addressed.**

## **Learning Objectives**

These learning objectives articulate broadly the knowledge, skills, and abilities needed by researchers to successfully conceptualize, find, analyze, and use primary sources. These objectives are intended to be illustrative and are neither comprehensive nor prescriptive, and are *not* presented in any natural order or progression of skill acquisition. They do not specify measurable outcomes or benchmarks for instruction, but can be of assistance in articulating specific learning goals that can be assessed.

The instructor teaching primary source literacy may choose to use any combination of these objectives and to teach the individual objectives at any level of mastery that fits the needs of the users.<sup>53</sup> Developing primary source literacy is an ongoing process that deepens as users gain experience interacting with these types of sources.

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<sup>52</sup> (librarians and archivists, curators, publishers, authors, researchers and users of the collections)

<sup>53</sup> Some examples might include a semester-long course or one-time workshop session, session focused on pedagogical goals of a faculty member or librarian/archivist-developed workshop, medieval manuscripts engagement or working with 20th-century archives.

A person knowledgeable in the use of primary sources can:

1. Conceptualize

- A. Distinguish primary from secondary sources for a given research question. Demonstrate an understanding of the interrelatedness of primary and secondary sources for research.
- B. Articulate what might serve as primary sources for a specific research project within the framework of an academic discipline or area of study.
- C. Draw on primary sources to generate and refine research questions.
- D. Understand that research is an iterative process and that as primary sources are found and analyzed the research question(s) may change.

2. Find and Access

- A. Identify the possible locations of primary sources.
- B. Use appropriate, efficient, and effective search strategies in order to locate primary sources. Be familiar with the most common ways primary sources are described, such as catalog records and archival finding aids.
- C. 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.
- D. 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.
- E. Recognize and understand the policies and procedures that affect access to primary sources, and that these differ across repositories, databases, and collections.

3. Read, Understand, and Summarize

- A. Examine a primary source, which may require the ability to read a particular script, font, or language, to understand or operate a particular technology, or to comprehend vocabulary, syntax, and communication norms of the time period and location where the source was created.
- B. Identify and communicate information found in primary sources, including summarizing the content of the source and identifying and reporting key components such as how it was created, by whom, when, and what it is.
- C. Understand that a primary source may exist in a variety of iterations, including excerpts, transcriptions, and translations, due to publication, copying, and other transformations.

#### 4. Interpret, Analyze, and Evaluate

- A. Assess the appropriateness of a primary source for meeting the goals of a specific research or creative project.
- B. 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.
- C. Situate a primary source in context by applying knowledge about the time and culture in which it was created; the author or creator; its format, genre, publication history; or related materials in a collection.
- D. As part of the analysis of available resources, identify, interrogate, and consider the reasons for silences, gaps, contradictions, or evidence of power relationships in the documentary record and how they impact the research process.<sup>54</sup>
- E. Factor physical and material elements into the interpretation of primary sources including the relationship between container (binding, media, or overall physical attributes) and informational content, and the relationship of original sources to physical or digital copies of those sources.
- F. Demonstrate historical empathy, curiosity about the past, and appreciation for historical sources and historical actors.

#### 5. Use and Incorporate

- A. Examine and synthesize a variety of sources in order to construct, support, or dispute a research argument.
- B. Use primary sources in a manner that respects privacy rights and cultural contexts.
- C. Cite primary sources in accordance with appropriate citation style guidelines or according to repository practice and preferences (when possible).
- D. Adhere to copyright and privacy laws when incorporating primary source information in a research or creative project.

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<sup>54</sup> For more on the various types of silence that occur in the process of making history, see Michel-Rolph Trouillot, *Silencing the Past: Power and the Production of History* (Boston: Beacon Press, 1995) and Rodney G.S. Carter “Of Things Said and Unsaid: Power, Archival Silences, and Power in Silences.” *Archivaria* 61 (2006) 215-233 who calls these silences “the manifestation of the actions of the powerful.”

## Appendices

### Appendix 1: Glossary of Terms Used in These Guidelines

The following glossary is designed to clarify the meaning of terms and concepts as used throughout these *Guidelines for Primary Source Literacy*. Definitions or phrases in quotation marks come directly from: Pearce-Moses, Richard, *A Glossary of Archival and Records Terminology*. Society of American Archivists, 2005. <http://www2.archivists.org/glossary>.

#### **Access**

The means of examining, retrieving, or obtaining primary sources for use. While users are able to access some primary sources on the open web, others are challenged by the limitations of the telecommunications infrastructure. Access to original primary sources can be reduced to some degree by concerns of preservation, security, privacy, legal constraints, or geographic location. Understanding the tools and practices used to describe and make these sources accessible is important to becoming an effective user of primary sources. See: *catalog record, database, finding aid*.

#### **Agency**

Possessing the ability to act. Agency is deeply enmeshed in power relationships; many people or groups are deprived of the agency to create or preserve records. The agency and actions of librarians and archivists underpin their work in collecting, arranging, and describing materials in their repositories. Users should also be aware of their own agency to access and use primary sources, and the possible limitations surrounding that agency.

**Archives:** See Special Collections / Archives

#### **Archivist / Librarian**

An information professional responsible for collecting/acquiring, organizing, describing, managing, and providing access to research materials, including collections of primary and/or secondary sources. This person usually works in the context of a library, archive, or other cultural heritage institution.

#### **Authority**

As relates to primary sources, authority may refer to the relative credibility and expertise of the creator(s) of a source, or it may refer to the authority to preserve, collect, access, and use/reuse.<sup>55</sup>

#### **Authenticity**

“Authenticity is closely associated with the creator (or creators) of a source. The authenticity of records and documents is usually presumed, but if questioned it can sometimes be verified by

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<sup>55</sup> The ACRL Framework for Information Literacy has a helpful discussion of authority, and how novices vs. experts approach this concept See “Authority is Constructed and Contextual” *Framework for information Literacy for Higher Education*, 2016. <http://www.ala.org/acrl/standards/ilframework#authority>.

testing physical and stylistic characteristics of a record. Authenticity alone does not automatically imply that the content of a record is reliable.” See also: *Evidence, Materiality*

### **Bias**

A prejudice in favor of one thing or person over another. Sources may include the biases of their creator(s) and of the individuals and institutions that collect these sources. Since bias may be implicit rather than obvious, a source may reflect unconscious or unintentional bias.

### **Catalog Record**

Descriptions of materials, whether books or manuscript collections, in a specific common format. Such records generally contain information including author, title, publication information, and topics covered in the resource. These records are often searched using a database, usually a library catalog. See also: *Finding Aid*

### **Citation**

A reference to a *source*. When citing a primary source, the citation helps point readers to the document or item. Citations may also further describe a source, help establish *evidence* for an argument, or give credit for an idea. Citation style refers to the format of citation and rules for its construction (examples: MLA, APA, or Chicago). Different disciplines may prefer one style over another. Archives and special collections may indicate a preferred citation formula or credit line for their collections.

### **Collection**

“A group of materials with some unifying characteristic,” often related either to the topic, the creator, or the assembler. Collections can be assembled by a person, organization, or repository. Collections can be referred to as “papers” or “records” in the context of a *Repository*.

### **Container**

“A package or housing used to hold materials,” such as a record carton or archival box; figuratively, the form in which content appears, such as a book, notebook, three-ring binder, email thread, etc.

### **Copy / Surrogate**

“Something that is nearly identical to something else; a facsimile; a reproduction; a duplicate made from an original.” The more specific term surrogate may be used to indicate a copy that is created to serve as a substitute for an original source, often with the intention of preserving the original by protecting it from overuse. When speaking of primary sources, a surrogate is often a digital version of a physical source that is housed in a specific collection or repository.

### **Copyright**

A legal right granting exclusive rights for use, reproduction, publication, adaptation, performance, and/or distribution of an original work (whether published or unpublished), typically for a limited period of time. Copyright law is intended to balance the economic and creative interests of the

rights holder with the desire of a public to use, adapt, or build upon previous work. Copyright law varies by country. See also *Fair Use* and *Permissions*.

### **Creator**

“The individual, family, group, or organization that is responsible for a source's production, accumulation, or formation.” Creators of primary sources include artists, authors, and manufacturers. An individual who accumulates and compiles a collection of primary sources may also be seen as the creator (of the collection), even when they did not create the sources themselves.

### **Cultural understanding**

The ability to understand the viewpoint of those from other cultures, whether in the present or past, and to understand shared or conflicted history. Understanding the importance of studying and preserving the records of many and created from many points of view.

### **Database**

A structured way to store and retrieve data. In the research and information environment, it often refers to a digital collection of citations, articles, books, and/or finding aids which can be searched for information on a variety of topics. Some research databases can be very general, while others are specific to a subject (United States history), time period (Early English Books Online), or format (newspapers). Databases can be produced by vendors or publishers, which usually require a paid subscription fee, while other databases are developed by and provide access to collections held by consortia or groups of institutions. Databases may provide access to citations, to finding aids, or to digital or digitized articles and primary sources.

### **Discipline**

A subject, field of study, or area of expertise. In the college/university environment, this could align with an academic department or program of study. In a K-12 environment, this could refer to the subject being taught. Disciplines often have specific views on the types of sources that should be used in research and what constitutes a primary source. While many research topics are interdisciplinary, students learning how to appropriately incorporate primary sources into their projects will often do so within the domains of disciplinary areas.

### **Evidence**

Primary sources serve as evidence used in answering a research question, proving or disproving a fact, or developing an argument. The strength of supporting evidence and the approach by which it is gathered and applied to a claim impact the credibility of the claim, and relate to *authority*.<sup>56</sup>

**Faculty:** *see Instructor*

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<sup>56</sup> For a nice discussion of teaching the use of evidence in historical research, including how “The intellectual ability to collect, process, analyze, and cross-reference evidence is crucial to an informed citizenry,” see: Stéphane Lévesque, “How Do We Make Sense of the Raw Materials of the Past? - Evidence,” chap. 6 in *Thinking Historically*:

**Fair Use**

Permissible use of copyrighted material. In the United States, use that is not considered infringement generally includes criticism, news reporting, teaching, scholarship, and parody. For more information, see <http://fairuse.stanford.edu/overview/fair-use/what-is-fair-use/> and <http://www.copyright.gov/fair-use/more-info.html>

**Finding Aid**

A description of papers, records, or a manuscript collection that provides information about the materials, including arrangement and organization, historical or biographical background, a summary of the contents of a collection, and location of materials. These descriptions are used to locate relevant items within the collection. A finding aid is written through the process of arrangement and description, in which an archivist organizes materials and details their content. See also: *Catalog Record*

**Format**

The container or method of presentation of a source. Descriptions of source formats might include those which identify the type of source (letter, diary, or photograph) or those which identify its state (physical or digital; handwritten or reprinted).

**Historical empathy**

The ability to appreciate the beliefs, values, and intentions of historical actors; to understand the differences inherent between the lives of current readers and past users; to show emotional engagement with a source; and to see and appreciate source(s) within their particular historical context.<sup>9</sup>

**Instructor**

These guidelines recognize that an “instructor” may refer to a faculty member or a teacher responsible for their own classroom, as well as to a librarian, archivist, or other professional who either collaborates with or works independently of a classroom teacher or faculty member.

**Iterative process**

All research is a repetitive cycle, requiring frequent returns to and revisions of earlier questions and assumptions, thus leading to new readings of texts and sources and new lines of inquiry.

**Librarian / Archivist:** *see Archivist / Librarian*

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*Educating Students for the Twenty-First Century* (Toronto: University of Toronto Press, 2008).

<sup>9</sup>

See also Yilmaz, Kaya. "Historical Empathy and Its Implications for Classroom Practices in Schools." *The History Teacher* 40.3 (2007): 331-37.

**Literacy**

Competency, knowledge, or skills in a specified area. Literacy is not a binary state, but rather a spectrum of competence within the area. Primary source literacy, information literacy, digital literacy, and visual literacy are all relevant to working with primary sources.

**Materiality**

The physical nature or format of a source. This is often distinguished from the content or the text of the source, although the best readings interrogate and elucidate both text and format. Often associated with material culture, the study of objects (rather than paper- or text-based sources) to learn about the past.

**Mediation**

The amount of intervention and contextualization between the user and the source. There are many kinds of mediation, whether through added content, translation, or the distance of a copy from the original source. For example, a primary document published in a compilation which includes an introduction about the writer and the event about which they were writing is more mediated than a publication which does not have an introduction. Librarians and archivists also provide mediation for documents through finding aids and catalog records, as well as their organization and arrangement of materials.

**Permissions**

If a particular use of a copyrighted work is not covered by *fair use*, a researcher may require authorization from the rights holders in order to use the work in certain ways.

**Preservation**

“The act of keeping objects from harm, injury, decay, or destruction.” In the life cycle of primary sources, creators themselves may or may not undertake the first steps toward preserving sources. The term also refers to specific professional practices<sup>57</sup> undertaken by repositories to stabilize and extend the life of materials in their care, ensuring they are as durable and long-lasting as possible. These include selection, stabilization, appropriate storage environment and handling, security, and conservation treatments. Preservation may also involve the creation of surrogates to serve as use copies, and the reformatting from decaying or outdated formats into those that are retrievable, readable, and usable over time. Users of primary sources contribute to preservation through proper handling and use. The concept of preservation is closely tied to the concept of *access*.

**Primary source**

Primary sources are materials in a variety of formats, created at the time under study, that serve as original evidence documenting a time period, event, people, idea, or work. Primary sources can be printed materials (such as books and ephemera), manuscript/archival materials (such as diaries or ledgers), audio/visual materials (such as recordings or films), artifacts (such as clothes or personal belongings), or born-digital materials (such as emails or digital photographs). Primary sources can be found in analog, digitized, and born-digital forms.

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<sup>57</sup> See the Preservation and Reformatting Section of the American Library Association for more information, <http://www.ala.org/alcts/mgrps/pars>.

**Privacy**

Librarians, archivists, and researchers need to be aware of various legal and ethical frameworks regarding privacy. Archivists and librarians in the United States may manage collections covered by privacy laws such as the Health Insurance Portability and Accountability Act (HIPAA) or the Family Educational Rights and Privacy Act (FERPA). Professionals may restrict or redact records because of applicable laws, institutional risk management decisions, donor agreements, or professional ethics. Professionals and researchers alike should consider these frameworks when citing, using, or promoting collections.

**Public Domain**

Works that are in the public domain do not have copyright restrictions. This could be because copyright or other intellectual property rights expired or were forfeited, because the work was created before such laws existed, because the work is not covered by copyright (as is the case with recipes or some government documents), or because the creator released the work under a public domain-like license allowing certain uses. Privacy and other ethical considerations should still be weighed when using materials in the public domain.

**Repository**

Umbrella term referring to a cultural heritage organization that collects, preserves, and makes collections accessible, generally for research. Could refer to museums, libraries, archives, historical societies, research centers, or other types of institutions. A repository may be independent or part of a larger organization. For those seeking to use primary sources effectively, having knowledge of the types of repositories and their various reasons and methods for collecting, preserving, and providing access, including the limits to each, is important for successfully identifying and using those collections. The term repository should be thought of paired with the concepts of *silences*, *authority*, *agency*, and *mediation*. See also: *Special Collections / Archives*

**Research Project**

Research projects may be scholarly, creative, or professional in nature. End products or deliverables can include written essays, papers, or articles; datasets or databases; performances; exhibitions; websites; artwork, etc.

**Research Question**

An idea or inquiry which drives a *research project*. A good research question is answerable, arguable, and is not too broad or too narrow. A research question is more specific to a particular issue or concern than a *research topic*. For example, within the topic of the World War II homefront, a research question might be how the use of victory gardens affected the food supply in certain areas of the United States. The research question determines what information is needed, and may help the researcher define which sources are considered “primary” for a given project.

**Secondary source**

A work synthesizing and/or commenting on primary and/or other secondary sources. Secondary sources, which are often works of scholarship, are differentiated from primary sources by the element of critical synthesis, analysis, or commentary.

**Silences**

Gaps or missing pieces in the historical record, often caused by those who were unable to write their own records, or whose records were not considered valuable or were suppressed by the dominant culture. Should be distinguished from merely lack of holdings in a particular repository. Sometimes also referred to as “archival silences.”

**Source**

A place where information is found, such as a document, book, or encyclopedia. Sources can be primary, secondary, or tertiary.

**Special Collections / Archives**

These terms each have multiple meanings, and are often used interchangeably. “Archive” is also a variation, used in a general way to describe things that are being intentionally kept.

1. A general term for a department, unit, library, or other physical place which stores and provides secure access to rare and unique materials, including archives, manuscripts, rare books, or other original materials. A special collections department is an example of a type of *repository*.
2. The materials or collections within a department, unit, or library containing rare and unique materials.

**Surrogate:** See *Copy*

**Appendix 2: Annotated Bibliography**

It would be helpful to include in the annotated bibliography articles that focus on the K-12 primary source experience, as well as websites that offer primary source lesson plans and guides for educators wanting to view examples of effective teaching methods.

The purpose of this annotated bibliography is to identify key resources for learning more about primary source literacy. It is deliberately selective. This bibliography focuses on peer-reviewed sources published between 2014 and 2017 when the work of the SAA/RBMS Primary Source Literacy Task Force concluded.

A more comprehensive bibliography, maintained but not regularly updated by the Reference, Access, and Outreach Section of the Society of American Archivists, is available at <http://www2.archivists.org/groups/reference-access-and-outreach-section/teaching-with-primarysources-bibliography>.

Bahde, Anne, Heather Smedberg, and Mattie Taormina, eds. *Using Primary Sources: Hands-On Instructional Exercises: Hands-On Instructional Exercises*. ABC-CLIO, 2014.

*Using Primary Sources* provides 30 examples of active learning exercises with primary sources held in special collections, archives, and museums, focused on the one-shot session. The introductory material discusses pedagogical approaches useful in teaching the skills associated with primary source literacy. The remainder and bulk of the text provides detailed lesson plans for each exercise, with suggestions for adapting to different learning environments. The exercises include introductory sessions on primary source analysis and the research process, as well as more advanced sessions on building analytical skills, contextualizing and synthesizing sources, interpreting finding aids, and interrogating a source's physicality.

Carini, Peter. "Information Literacy for Archives and Special Collections: Defining Outcomes." *portal:*

*Libraries and the Academy* 16, no. 1 (2016): 191-206.

This article provides context for the background and value of information literacy as it pertains to primary sources. Carini explains the need for a set of standards and outcomes specifically addressing primary source literacy. The article provides a proposed framework of primary source learning outcomes which are situated within the following areas: know, interpret, evaluate, use, access, and follow ethical principles. Carini closes the article with a section on possible applications of the proposed outcomes. This article provides example learning outcomes and explains the necessity of addressing the void of primary source literacy standards.

Hensley, Merinda Kaye, Benjamin P. Murphy, and Ellen D. Swain. "Analyzing Archival Intelligence: A Collaboration between Library Instruction and Archives." *Communications in Information Literacy* 8, no.

1 (2014): 96-114. Available at:

<http://www.comminfolit.org/index.php?journal=cil&page=article&op=view&path%5B%5D=v8i1p96..>

This article provides background on the obstacles students face when learning to navigate archival research and offers ideas on how to address those obstacles in instruction, based on a 2012 study conducted at the University of Illinois at Urbana-Champaign. The study revealed that students struggled to understand the specialized language surrounding archives and to navigate the complexity of the archival research process. Students were further confused about the difference between libraries and archives, the concept of provenance, and the relationship between finding aids and the collections they represent.

Horowitz, Sarah M. "Hands-On Learning in Special Collections: A Pilot Assessment Project." *Journal of Archival Organization* 12, no. 3-4 (2014): 216-229.

This article acknowledges the increased demand that special collections departments face with regard to providing meaningful assessment and standards for evaluating outcomes in classes that provide hands-on learning experiences with primary sources. The author describes a specific assessment project at Augustana College using rubrics to attempt to gauge the impact of hands-on primary source engagement upon student information

literacy and critical thinking skills. Although the results were inconclusive, this article addresses the need for better assessment tools and serves as a trailblazer in creating rubrics for primary source literacy that tie directly to pre-existing assessment tools provided by ACRL.

Mitchell, Eleanor, Peggy Seiden, and Suzy Taraba. *Past or portal?: Enhancing undergraduate learning through special collections and archives*. Association of College & Research Libraries, 2012. This volume gathers case studies describing effective primary source instructional activities, contributed by 47 U.S. based institutions. The focus is specifically on undergraduate students, and it highlights a wide variety of instructional models that provide important guides for teaching with primary sources, from one-shot sessions to longer programmatic interventions.

Morris, Sammie, Lawrence Mykytiuk, and Sharon Weiner. "Archival Literacy for History Students: Identifying Faculty Expectations of Archival Research Skills." *The American Archivist* 77, no. 2 (2014): 394-424.

Morris, Mykytiuk, and Weiner studied core competencies for using primary sources and archives, specifically for history students. Through a review of the literature and course syllabi as well as interviewing faculty, the authors developed a list of competencies for undergraduate history majors. This article concludes with a suite of recommendations to advance archival literacy within institutional contexts as well as within the archives profession.

Mulroney, Lucy and Patrick Williams, "Doing It Yourself: Special Collections as a Springboard for Personal, Critical Approaches to Information." In T. Swanson and H. Jagman (Eds.) *Not Just Where to Click: Teaching Students How to Think about Information* (Publications in Librarianship #68), ACRL Press, 2015.

This chapter describes a collaborative effort between a special collections curator, a subject specialist librarian, and a writing instructor to plan a series of sessions for an undergraduate writing class studying DIY publishing. The project required students to use a primary source from Syracuse University's special collections as inspiration to construct a zine on the topic of their choice, which they presented and distributed during a public "Zine Fest." The authors discuss how primary source research impacted students' information literacy skills in a variety of areas, including critically evaluating sources, participating in the scholarly conversation, and taking ownership of their original research in a particular subject area.

Prom, Christopher J. and Lisa Janicke Hinchcliffe. *Teaching with Primary Sources*. Chicago, IL: Society of American Archivists, 2016.

*Teaching with Primary Sources* describes the development of primary source literacy, but also offers practical, hands-on ideas to integrate primary source literacy into curricula. Module one contextualizes archival literacy by describing its development in the archival

profession and in broader educational frameworks. The second module serves as a guide to the practices of teaching for archivists, librarians, and other educators. It offers many practical ideas, from explaining various roles archivists play as educators to offering lesson plan templates. The third and final module summarizes numerous case studies about connecting students with primary sources. Secondary educators, faculty in higher education, and archivists were all interviewed to share their strategies and successful projects. The bibliographies of suggested reading lists and additional resources are also quite useful.

Samuelson, Todd, and Cait Coker. "Mind the gap: Integrating special collections teaching." *portal:*

*Libraries and the Academy* 14, no. 1 (2014): 51-66.

This article provides advice to archivists interested in building stronger relationships with fellow librarians and teaching faculty. The authors use a case study examining these relationships at their own institution to point out that the most effective way to reach teaching faculty and librarians is to demonstrate how materials in special collections libraries can be used to meet curricular needs.

Swain, Ellen D. "Best Practices for Teaching with Primary Sources," in Patrick Ragains and M. Sandra Wood. *The new information literacy instruction: best practices*. Rowman & Littlefield, 2015.

This book chapter presents a case study describing the relationship between the Student Life and Culture archives and the Rhetoric program at the University of Illinois at UrbanaChampaign. The case study describes a shift in archives instruction from a broad, introductory overview approach to a more in-depth, targeted approach, and is useful reading for others interested in considering a similar shift.

Theimer, Kate, ed. *Educational Programs: Innovative Practices for Archives and Special Collections*.

Rowman & Littlefield, 2015.

This book is a collection of case studies on developing educational programming centered on primary sources. It demonstrates the many ways special collections and archives can be integrated into curricula at the K-12, undergraduate, and graduate levels. Many of the ideas are transferrable to a variety of institutions and are appropriate for either long-term programmatic development or immediate implementation on a relatively small scale. This resource is an effective introduction to hands-on learning with primary sources, and the format allows for selecting chapters based on audience or type of program.

Weiner, Sharon A., Sammie Morris, and Lawrence J. Mykytiuk. "Archival Literacy Competencies for Undergraduate History Majors." *The American Archivist* 78, no. 1 (2015): 154-180.

This article is the second in a series of articles documenting efforts to establish archival literacy competencies for undergraduate history majors based on input from faculty, archivists, and librarians. The resulting list includes both basic and advanced skills

recommended for undergraduate history majors across a variety of skillsets, including identifying and locating sources, incorporating sources into research, obtaining guidance from archivists, demonstrating acculturation to archives, and ethically using information obtained from sources. These skills could be adapted or expanded to be used in a variety of instructional settings.

### Appendix 3: Related Resources

*ACRL Framework for Information Literacy for Higher Education*. Association of College and Research Libraries (Adopted January 11, 2016). <http://www.ala.org/acrl/standards/ilframework>.

The *ACRL Framework for Information Literacy* provides a background for these guidelines and is a useful companion to the *Guidelines for Primary Source Literacy*, particularly for librarians and instructors at the college or university level. The two documents can be used in unison to encourage informed collaboration between archivists and librarians who work with primary source materials and information literacy librarians at the college or university level. Both documents are intended to be flexible, and applied not as a prescriptive standards, but as suits the needs of instructors and students within a particular learning environment. Both documents can be used to create assessment strategies at a local level based on the particular needs of a given audience.

*ACRL Visual Literacy Competency Standards for Higher Education*. Approved by the ACRL Board of

Directors, October 2011: <http://www.ala.org/acrl/standards/visualliteracy>

These Competency Standards are useful to consult alongside the *Guidelines for Primary Source Literacy*, particularly when confronting primary sources with visual elements.

Society of American Archivists, Reference, Access, and Outreach Section, Teaching with/about Primary Sources committee: <http://www2.archivists.org/groups/reference-access-and-outreachsection/teaching-withabout-primary-sources-committee>

The SAA RAO Section committee on Teaching with/about Primary Sources compiles useful resources and hosts professional development opportunities related to teaching with primary sources and is a useful resource for professionals looking to expand their skills in that area.

### Appendix 4: Background on the Development of These Guidelines

The SAA-ACRL/RBMS Joint Task Force on Developing Guidelines for Primary Source Literacy was charged as an outgrowth the RBMS Task Force on Metrics and Assessment's 2013 recommendations, and in response to the SAA Reference, Access, and Outreach (RAO) Section's 2013 Survey results<sup>58</sup> and other findings in the professional literature that noted the profession would benefit from a framework to undergird the work of teaching with primary sources. RAO Chair at the time Lisa Sjoberg and RBMS Executive Board Liaisons Anne Bahde and Heather

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<sup>58</sup> <http://www2.archivists.org/groups/reference-access-and-outreach-section/teaching-withabout-primary-sources-committee>

Smedberg submitted a proposal to both organizations in 2014 and the task force creation and charge were formally approved by SAA Council in November 2014<sup>59</sup> and by the RBMS Executive Board in February 2015<sup>60</sup>. The task force was charged for a two-year term to begin in the summer of 2015. While comprised of special collections librarians and archivists, the task force was charged to consider broader perspectives on primary source literacy outside the direct environment of special collections and archives, and to draft guidelines that would be applicable in multiple primary source learning situations with diverse instructor roles, audiences, and purposes.

Members:

ACRL/RBMS-appointed members

- Anne Bahde (Oregon State University)
- Julie Grob (University of Houston)
- Sarah Horowitz (Haverford College)
- Leah Richardson (George Washington University)
- Heather Smedberg, co-chair (University of California, San Diego)
- Morgan Swan (Dartmouth College)

SAA-appointed members

- Samantha Crisp (Augustana College)
- Gordon Daines (Brigham Young University)
- Robin Katz (University of California, Riverside)
- Bill Landis, co-chair (Yale University)
- Sammie Morris (Purdue University)
- Lisa Sjoberg (Concordia College)

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<sup>59</sup> November 2014 SAA Council minutes that reflect approval:  
[https://www2.archivists.org/sites/all/files/1114\\_Minutes\\_Adopted.pdf](https://www2.archivists.org/sites/all/files/1114_Minutes_Adopted.pdf). See consent agenda (item II, page 2 of 33) item II.D on page 4 of 33.

<sup>60</sup> February 2, 2015 RBMS Executive Board minutes that reflect approval:  
<http://rbms.info/files/committees/minutes/2015/execminutes15m.pdf>