



Bridging the Gap: Competencies for Teaching with Primary Sources

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abstract: This article reports on research done at Brigham Young University on supporting teaching with primary sources. It reviews the literature on primary source literacy and lessons gleaned from interviews with faculty to begin to identify the competencies necessary to teach the skills of primary source literacy. It breaks these competencies down into manageable groups, both for special collections professionals and for faculty. The areas of competency include (1) domain knowledge and primary source skills, (2) pedagogy and instructional design skills, and (3) communications and soft skills. The article also examines two particularly effective teaching techniques—scaffolding and modeling. It concludes with a call for further conversation about how to teach with primary sources.

Introduction

Instruction using primary sources has become an important tool employed by many faculty members at institutions of higher education. Faculty see value in teaching with such sources for a variety of reasons, such as enabling students to develop the skills necessary to successfully complete assignments and to enter scholarly discussions. Teaching with historical documents and other original sources also fosters critical thinking, cultural competency, civic engagement, visual literacy, and historical empathy, as well as research and writing skills. Despite the benefits of teaching with primary sources, many faculty members hesitate to use them because teaching with primary sources—documents, objects, or other sources of information created at the time under study—is not easy, especially for novices. Students new to primary sources must be eased into their use, which requires thoughtful instructional strategies. This article reports on research done at Brigham Young University (BYU) in Provo, Utah, to

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understand how the library can best assist faculty who teach with primary sources. The authors propose a set of knowledge, skills, and abilities that special collections professionals and faculty who teach with original, first-hand sources should have to ensure that their teaching is successful. These competencies are drawn from the literature on primary source literacy as well as faculty interviews.

Ithaka S+R Research Project

To better understand how to support faculty in teaching with primary sources, the Harold B. Lee Library at Brigham Young University participated in Ithaka S+R's "Supporting Teaching with Primary Sources" research study, along with ProQuest and 25 higher education institutions in North America and the United Kingdom.¹ Ithaka S+R is "a not-for-profit organization helping the academic community use digital technologies to preserve the scholarly record and to advance research and teaching in sustainable ways" with the goal to "broaden access to higher education by reducing costs and improving student outcomes."² The "Supporting Teaching with Primary Sources" study examined the pedagogical practices of humanities and social science faculty teaching with such sources at the undergraduate level.

Each contributing institution identified faculty on their campuses who use primary sources in their instruction. A semi-structured interview was used to learn more about the faculty's motivations for using these sources and to identify pedagogical practices. The results discussed in this article summarize data gathered at Brigham Young University, where 17 participants were recruited through convenience sampling—that is, gathering easily available subjects—and interviewed between August and November of 2019. Qualitative analyses were conducted using open coding and based on the principles of grounded theory, in which researchers review the data they have collected to find repeated ideas, then group them into concepts or categories. Those interviewed were professorial faculty from the Departments of History, Design, Comparative Arts and Letters, Religious Education, French and Italian, Asian and Near Eastern Languages, Political Science, and English, and from the David M. Kennedy Center for International Studies. Five participants were assistant professors, seven were associate professors, four were full professors, and one was an adjunct professor. The findings from these interviews were used to produce a local report focused on how the Harold B. Lee Library could better support teaching with primary sources at Brigham Young University.³ The interviews were submitted to Ithaka S+R, which analyzed them along with those from the other institutions to generate a broader report on why and how faculty incorporate such sources into their instruction.⁴

The interviews with faculty at BYU were illuminating. Interviewees discussed how they learned to teach with primary sources, the techniques they use when teaching with such sources, and their desire for assistance when teaching with these types of sources.

To establish a baseline, faculty members were asked to describe what they teach and their experience with teaching with primary sources. Faculty responses to these questions revealed a consistent pattern—all the faculty members, regardless of their discipline, had little formal training on how to teach with primary sources. Of the 17 faculty members interviewed, 15 stated that they had received no formal training at



any point during their education or their teaching career. Two respondents reported that they had some formal training, but the answer of one, respondent 7, was vague: “Well, I mean, I’ve sat in on a number of courses over the years.”⁵ The nature of these courses was not clarified. The only other respondent who had training, respondent 12, provided an interesting example of formal training: “We also have some people in our department . . . who specialize in historical literacy, who [have] provided some training classes to the faculty that are interested. And that’s been a real help to figure out how to use them [primary sources] even more effectively.” It was surprising, and somewhat sobering, that only one faculty member mentioned any systematic attempt to provide training on teaching with primary sources.

Despite the lack of formal training, faculty members at Brigham Young University felt that they had received informal coaching in how to teach with primary sources. The most common type of informal training was experience-based and occurred during their years as either undergraduate or graduate students. Other informal training included discussions in department study groups, hallway conversations with colleagues, adapting colleagues’ assignments to fit their own needs, participating in a library-sponsored workshop (which might be considered formal training), and learning by doing—for example, when their own research agendas made them learn how to use primary sources or by simply incorporating such sources into their teaching in a trial-and-error effort.

On a positive note, many faculty had some experience using primary sources as part of their undergraduate or graduate coursework. These encounters led them to see value in incorporating such materials into their own teaching. The most impactful experiences came when their professors used the sources in their classrooms or incorporated them into assignments. The Ithaca S+R research report “Teaching with Primary Sources: Looking at Support Needs of Instructors” observed that it was common across all institutions for instructors to base their own pedagogical practices on prior research experiences or to model their techniques on those of their former teachers and mentors. Yet, the report notes,

In no instance did interviewees describe this modeling as an intentional or explicit part of their pedagogical training in graduate school, but rather something they were supposed to implicitly absorb. One instructor explained that when it came to learning how to teach with primary sources, the prevailing attitude seemed to be “oh, you’ll figure it out, you should just know.” This sense that “you should just know” is a direct consequence of the implicit and informal nature of much of the professional training that occurs in graduate education, but often results in a sense that if one does not “just know” then it is a failing of the individual and not the structure of the program.⁶

The fact that most faculty learn to teach with primary sources through observation and experience indicates the importance of understanding how special collections professionals can better support instructors in developing meaningful learning experiences that involve such sources. Special collections professionals can help faculty fill gaps in their pedagogical training and build their primary source literacy and teaching skills.

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The professionals can develop structured training for faculty to help them teach with primary sources and to ensure that students, both undergraduate and graduate, receive the best learning experiences possible.

Several spontaneous comments from faculty indicated a desire for more training, with even a few suggestions of how it could be done, from a class for faculty to department retreats and brown bag lunches. One instructor even expressed a desire to attend

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Rare Book School, which provides intensive, five-day courses on the history of books and printing. A suggestion from respondent 8 included an astute observation: "I think it would be beneficial in our department if there was more formal discussion of this sort of thing, but in a place like BYU where we're rewarded primarily for our research . . . the benefits of doing that are less." This feedback shows that special collections professionals need to broaden their focus from learning how to teach with primary sources themselves to instructing faculty in how to effectively teach with such sources. This requires understanding the competencies necessary to deliver such instruction

and how faculty view their pedagogical practice.

Literature Review

Instruction with primary sources has become an important component of the work assignments of many special collections professionals, and yet most do not receive pedagogical instruction over the course of their academic training. They must learn the skills necessary to teach primary source literacy on the job. The Rare Books and Manuscripts Section (RBMS) of the Association of College and Research Libraries (ACRL) was the first professional association to formally recognize the importance of pedagogical skills for special collections professionals. The ACRL "Guidelines: Competencies for Special Collections Professionals," revised in 2017, include a section on teaching that describes the importance of applying "relevant and effective pedagogical methodologies and best practices."⁷ Neither the National Council on Public History nor the Society of American Archivists has formally acknowledged the importance of pedagogy as a critical skill for special collections professionals.

Understanding the competencies necessary to teach primary source literacy will enable both special collections professionals and faculty to help students develop the skills necessary to successfully use archival and other original sources. The special collections literature has many case studies and articles about how professionals have developed and maintained instruction programs. There is no agreed-upon set of competencies, however, related to the pedagogy of primary source literacy from which special collections professionals newly tasked with teaching can draw. The literature also says little about what skills faculty need to teach with primary sources or how special collections professionals can help them develop these abilities.⁸ This article highlights the importance of establishing a set of competencies for teaching with such sources and expands on the RBMS competencies. The authors propose a set of knowledge, skills, and abilities that



special collections professionals and faculty who teach with primary sources should have to ensure that their teaching is successful. Many of the skills are drawn from the primary source literacy literature discussed in this article, and others are taken from interviews with BYU faculty. While none of the skills is particularly innovative on its own, their articulation as a set of competencies necessary for teaching with primary sources is.

The literature describes a wide variety of skills that special collections professionals should have to teach with primary sources. It does not, however, group them into a set of competencies that will allow special collections experts to successfully instill primary source literacy. It is helpful to examine these skills before turning to an exploration of why faculty teach with primary sources and what abilities they describe as important for such teaching.

The skills described in the literature as useful for special collections professionals include the ability to collaborate and communicate clearly, to identify and teach transferable skills, to model the special collections research process, to design scaffolded learning exercises, and to create inquiry-based exercises that engage students with hands-on activities. All these abilities are relevant to faculty as well and were described as important teaching skills by Brigham Young University faculty.

Primary source instruction is most successful when special collections professionals partner with faculty in the design and implementation of course activities and assignments.⁹ This collaboration provides special collections professionals with an understanding of the skills that faculty want students to develop. The professionals can then create assignments that enable students to gain those skills and “provide a reinforcing mechanism for the learning process.”¹⁰ Ellen Jarosz and Stephen Kutay describe the creation of a guided resource inquiry tool to integrate online primary sources into course assignments. They highlight that the success of the tool “required a collaborative relationship between librarians, archivists, and course instructors.”¹¹ Greg Johnson and Jennifer Ford also underscore the importance of an “extended planning process involving collaboration with faculty” when designing primary source instruction sessions.¹² Close collaboration with faculty enables special collections professionals to clearly understand the goals of the course and thus design and create learning activities that meet those goals.

Close collaboration is also important because special collections professionals should encourage faculty to “adopt information literacy as a goal when developing their courses.”¹³ Faculty may have to relinquish some control over their curriculum in the interest of providing students with a richer learning experience. Special collections professionals need to clearly articulate the skills that they can help learners develop and utilize language that enables faculty to

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see the value of partnering in the teaching of primary sources. The goal of interaction between special collections professionals and faculty should be a dialogue about how best to meet the learning needs of students. Understanding the “teaching needs and objectives of faculty and instructors is critical to any partnership.”¹⁴

Faculty teach with primary sources for a number of reasons. Two important incentives are helping students “develop crucial historical thinking, analysis, and communications skills”¹⁵ and aiding them in building “transferable skills, such as study skills, time management, and skills related to the research project and preparation for it.”¹⁶ Faculty and students expect special collections professionals to assist them in reaching their goals. The professionals need to “identify and integrate transferable skills into learning objectives,” and they should help “students reflect on how the skills acquired throughout the process of learning with primary sources are applicable and transferable across other disciplinary, professional, and personal contexts.”¹⁷ The most effective way to do this is for both special collections professionals and faculty to explain and model the transfer process.

The ability to model transferable skills as well as the research process itself are key skills that special collections professionals and faculty must possess. Merinda Kaye Hensley, Benjamin Murphy, and Ellen Swain found that students were much more successful when the research process was modeled for them.¹⁸ Modeling is particularly helpful when the component parts of the process are clearly explained and demonstrated. This suggests that the most effective modeling utilizes the pedagogical technique of scaffolding.

Other disciplines suggest that “scaffolding assignments promote a richer, more elaborate understanding of theoretical concepts.”¹⁹ Wayne Smith, Erin Butcher, Stephen Litvin, and Robert Frash found that incorporating real-world learning opportunities through situated and authentic teaching strategies enables students to build upon the theoretical knowledge that they have gained and facilitates a richer understanding of the material. Smith, Butcher, Litvin, and Frash found that “teaching in stages allowed educators to provide feedback and offer solutions, which enabled students’ deeper comprehension and capacity to produce a valuable result on their own.”²⁰ Special collections professionals have “an opportunity to integrate primary sources into instruction using a scaffolded approach that offers students opportunities to practice skills that gradually increase in complexity and difficulty throughout a lesson or series of lessons.”²¹ Successful scaffolding requires careful planning and a high degree of collaboration between special collections professionals and faculty. Scaffolding and modeling are most effective when they incorporate hands-on experiences.

One way to engage students is to provide them with active learning opportunities, in which learners become actively engaged in assimilating the material instead of passively absorbing it. The materials in special collections repositories provide unique opportunities to do so. Chris Marino explained that “archival instruction pedagogy is shifting from a traditional lecture-based approach to hands-on strategies falling within the realm of active or inquiry-based instruction.”²² He discovered that “students who received inquiry-based instruction felt significantly more confident handling archival materials; excited by the materials presented to them; comfortable contributing to the discussion; and appreciative of the archival materials they encountered.”²³ Ellen Swain used “hands-on exploration of source analysis” to help learners develop the ability to



think critically about the information in archival documents.²⁴ Janet Hauck and Marc Robinson also found that “hands-on research practice” was extremely helpful for students.²⁵ Assignments that allow learners to directly engage with primary sources force them to think critically and utilize the skills that they have acquired in their courses. When these assignments are designed jointly by faculty and special collections professionals, the learning is rich and deep.

Faculty want to use primary sources in their instruction because they have experienced the richness that such material brings to learning. Before turning to the competencies that special collections professionals and faculty require to teach with primary sources, it is helpful to understand what faculty are trying to teach and how special collections professionals might help them meet their goals. This article will then articulate a set of competencies for special collections professionals and faculty derived from the special collections literature as well as interviews with Brigham Young University faculty.

Skill Development and Teaching Techniques

Skill development lies at the heart of why many faculty members teach with primary sources. Such sources facilitate the development of abilities that benefit students in multiple areas of their collegiate and life experiences. Faculty at Brigham Young University identified multiple skills that they try to help students master. The abilities mentioned by one or more faculty members in interviews include visual literacy, cultural competency, critical thinking, research skills, writing skills, information verification, reading skills, search skills, and historical empathy, an understanding of how people in the past lived and thought (see Table 1 for a more detailed list). These abilities are taught in specific disciplinary contexts that influence the skills to be emphasized and how they are utilized. Respondent 2, a history faculty member, expressed the connection between skill development and disciplinary context by stating that primary sources are the lifeblood of history and that assignments need to “help students build the skills that they need to be a good historian.” Faculty recognize the importance of disciplinary context in teaching skills through primary sources, but they also understand and value that many of the abilities are transferrable to other contexts. Instruction with such sources provides an important means for helping students understand the wide applicability of the skills they are developing.

Given special collections professionals’ experience in instruction with primary sources, they are well positioned to help teach many of the skills that were identified by faculty in Table 1. They are also adept at showing how these skills might transfer between disciplines. In 2015, the Society of American Archivists and the ACRL Rare Books and Manuscripts Section jointly established a task force to develop guidance for primary source literacy. In 2018, they published the “Guidelines for Primary Source Literacy,” which provide recommendations on teaching literacy with archival and other histori-

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Table 1.

Skills that faculty want students at Brigham Young University to learn

Cultural competency
 Visual literacy
 Critical analysis
 How to find primary sources
 Connecting sources to each other
 Research skills
 Writing skills
 Verifying information
 Placing documents in context
 Exploratory process of Special Collections
 Contributing to the scholarly conversation
 Reading and analyzing primary sources
 Historical literacy
 Identifying primary and secondary sources
 Language skills—developing fluency
 Translating topic into a search term
 Strategizing how to get information (information literacy)
 Text and footnote mining
 Historical empathy
 Thinking intentionally about formats and how format impacts content

cal materials.²⁶ The guidelines also provide a useful tool for helping special collections professionals communicate what they can offer faculty. The authors mapped the skills BYU faculty want to teach to the guidelines to facilitate communication with our faculty colleagues (see Table 2).

Curators in the Perry Special Collections at BYU use a variety of techniques to help students learn many of the skills described by the “Guidelines for Primary Source Literacy.” A particularly useful activity involves the hands-on use of primary sources. At Brigham Young University, a course called the Historian’s Craft (History 200) introduces students to the history major and the skills needed to be a successful historian. The course focuses on effective and ethical research, critical analysis, and persuasive communication through clear writing. All these abilities can benefit from the use of primary sources. Faculty who teach this course frequently bring their students to the Perry Special Collections to learn about and engage with the materials in the collection.



Table 2.

Skills that Brigham Young University faculty try to teach, mapped to the “Guidelines for Primary Source Literacy”

Skill	Relevant section of the guidelines*
Cultural competency	4C
Visual literacy	4E, 3A
Critical analysis	4A, 4B
Critical thinking skills	4B, 4D
How to find primary sources	2A
Connecting sources to each other	1A
Research skills	2A-E
Writing skills	3B, 5A
Verifying information	4D
Placing documents in context	4C
Exploratory process of Special Collections	1D
Contributing to the scholarly conversation	5
Reading and analyzing primary sources	3, 4
Historical literacy	4B, 4C
Identifying primary and secondary sources	1A
Language skills—developing fluency	3A
Translating topic into a search term	1C
Strategizing how to get information (information literacy)	2B
Text and footnote mining	2B
Historical empathy	4F
Thinking intentionally about formats and how format impacts content	3A

*Association of College and Research Libraries/Rare Books and Manuscripts Section-Society of American Archivists Joint Task Force on the Development of Guidelines for Primary Source Literacy, “Guidelines for Primary Source Literacy,” 2018, <https://www2.archivists.org/sites/all/files/GuidelinesForPrimarySourceLiteracy-June2018.pdf>.

A typical class session gives a broad overview of the kinds of materials held in Special Collections, discusses how to find items using the library catalog and other discovery tools, and directly engages students with primary sources. By direct engagement with primary sources, students begin to develop and hone such skills as source evaluation, critical thinking, and historical empathy. To facilitate the development of these skills, curators provide students with a variety of materials and a worksheet to guide them in



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which the item was created, who would have interacted with it, why they would have used it, and what information can be gleaned from it. Students are also asked to think about how the primary source could be used in research and what additional information would need to be gathered to successfully integrate the source into an argument. Students work individually and then come together as a group to discuss what they have learned. Faculty find this activity effective in preparing students for future engagements with primary sources.

Curators in the Perry Special Collections discovered the effectiveness of this pedagogical approach through a process of trial and error. While this technique succeeds in helping students in the moment, the long-term impact is unclear because most instructors who teach the Historian's Craft bring their students to Special Collections only once. Students do, however, write a research paper for this class that requires the use of primary sources, and so many of them return to Special Collections on their own. Helping students succeed with a research paper requires a different pedagogical approach for both special collections professionals and faculty.

Research papers are a common way to engage students with primary sources. These assignments typically ask students to identify a topic and then begin their research. This can be challenging for students who have not utilized such sources previously. Some faculty at Brigham Young University attempt to overcome this challenge by using

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scaffolding. Scaffolding refers to a variety of instructional techniques that move students progressively toward stronger understanding of concepts and greater independence in the learning process. Faculty provide temporary supports to facilitate skill development and remove them as students master the desired skills.²⁷ One of these supports is interacting with special collections professionals. Scaffolding is a particularly successful technique for helping students develop the effective use of primary sources.

One faculty member, respondent 14, described the importance of scaffolding to aid student learning. The professor talked about describing the course's major research project on the first day of class. The typical reaction of students was trepidation about the amount of work required. Respondent 14 offset that challenge by breaking the assignment down into discrete elements, explaining that students "hand in probably a total of six assignments to actually complete this assignment. And since each one is done discretely and each assignment leads into the next assignment, it works pretty well." The

engaging with those items. The primary sources include correspondence, diaries, meeting minutes, photographs, and newspaper clippings and other published material. The students are asked to identify what type of source they have and then consider a series of questions about it. These questions include dating the item and identifying the creator, the purpose for

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instructor walked students through the process associated with accomplishing a major research project and introduced them to the skills that will enable them to successfully use primary sources. The skills introduced include identifying sources, using special collections (including interacting with special collections professionals), transcription, annotation, and writing.

Scaffolding is not the only technique that faculty members use to help students overcome the challenge of using primary sources. Some instructors intentionally model the research process by involving students in the instructor's own research or by walking them step-by-step through the process. Respondent 10 described how he demonstrated the use of such sources as an integral part of one of his courses. He worked with students to identify materials in the Japanese collection that could be the subject of research and then assigned students items to study. They would, he said,

go [to] Special Collections and look at those items and create metadata and annotations and other things, but throughout that process we were using a variety of different databases—digital but also paper catalogs to find similar or duplicate items in other collections around the world to understand the rarity as well as the condition and importance of the items we have here . . . And I just kind of helped them as they went along.

The faculty member found this approach effective but was concerned about the amount of effort that it took. He suggested that developing a teaching module to help students with certain aspects of using primary sources might have been a better use of his time. Despite the time investment, modeling the process was effective in helping students gain the skills that this instructor wanted to teach.

Respondent 12 described how modeling the skills that he was teaching really helped students understand them. He stated, "If you can teach them to read and think like a historian, they'll pause . . . and they'll start saying, 'Okay, well, who wrote this, and what is it about?' and things like that." Respondent 14 reported something similar, saying, "I find that teaching them research techniques that are similar to the ones that I use in my own scholarship makes the literature come alive in ways that it doesn't otherwise." Both comments highlight the impact of modeling and how faculty use their own research to show students what the process looks like.

Faculty at Brigham Young University use techniques such as scaffolding and modeling when teaching with primary sources because they have found these methods useful in helping students develop what respondent 3 calls "transferable skills." These capabilities, according to respondent 2, include "research skills, writing skills, interpretation, analytical thinking, [and] critical thinking." They play a critical role in students' chosen disciplines. The development of these skills is enhanced when special collections professionals are involved in teaching them.

The "Guidelines for Primary Source Literacy" provide an important communication tool that enables special collections professionals to more effectively work with faculty who teach with primary sources. Identifying specific abilities that faculty want taught and mapping them to the guidelines enable special collections professionals to design effective instruction sessions aimed at introducing those skills. When the professionals work collaboratively with faculty to encourage the use of scaffolding and modeling as teaching techniques over the course of a semester, these sessions become even more effective.



In 2017, a new BYU faculty member contacted a curator at the Perry Special Collections about providing instruction for a medieval history course as she developed a syllabus and assignments. The curator and professor met to discuss the professor's intended learning outcomes and to develop a hands-on active learning experience in

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Special Collections to support a class assignment. The professor wanted students to view facsimiles of medieval apocalypse manuscripts. Students would be asked to choose two illustrations from the facsimiles and write a short analysis paper connecting the imagery of the end time in those manuscripts to historical themes and events covered in course readings and lectures. The professor and curator decided that a class visit to Special Collections would introduce students to medieval manuscript culture and orient them to finding and using the facsimiles. The class visit was scheduled about a week before the assignment was due,

after a lecture that explained the popularity of apocalypse manuscripts in thirteenth- and fourteenth-century England.

After meeting with the professor, the curator consulted the "Guidelines for Primary Source Literacy" and constructed three lesson objectives for the class visit. The curator mapped these objectives to relevant sections of the guidelines as follows:

1. Students will understand how manuscripts were made and used in the thirteenth and fourteenth centuries. (Based on "Guidelines for Primary Source Literacy," 3A: "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.")
2. Students will be able to discover this material using library search tools and will be able to return to Special Collections to access it. (Based on "Guidelines," 2B: "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"; and 2E: "Recognize and understand the policies and procedures that affect access to primary sources, and that these differ across repositories, databases, and collections.")
3. Students will formulate research questions about primary source material to begin their course assignment. (Based on "Guidelines," 3A, quoted earlier, and 4C: "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.")

The curator selected nine manuscript facsimiles from Special Collections for use in class, in consultation with the professor. During the class visit, the curator used original medieval documents to demonstrate how manuscripts were made in medieval Europe, allowing students to view multiple examples and to handle sheets of vellum. The students

were then paired at tables with one of the nine facsimiles and provided brief instructions on handling rare books. Next, students were assigned a think-pair-share activity to find evidence of manuscript production methods and formulate questions about images in their manuscript. After the pairs shared their observations with the rest of the class, the curator provided instruction on requesting Special Collections material. The curator also shared a list of the items shown in class, which students could take with them to start their assignment.

The curator assessed the effectiveness of this collaboration through feedback from the professor and her students. She reported that her students enjoyed their visit to Special Collections and felt confident in their ability to complete the assignment after the instruction session. The professor has repeated the assignment and class visit several times for subsequent semesters of this course, confirming that faculty want to work collaboratively with special collections professionals to teach primary source skills. The "Guidelines for Primary Source Literacy" clearly articulate the skills that students can gain from courses that use such sources in teaching. The guidelines do not, however, set forth the competencies necessary to successfully teach with primary sources. In identifying a common set of skills and abilities that instructors should have to teach with primary sources, the authors hope to spark a conversation within the profession on how to bridge gaps in pedagogical training. They also hope to find common ground with university instructors to improve teaching practices, both in the classroom and in libraries and archives.

Competencies for Teaching with Primary Sources

One of the most enlightening parts of the interviews was listening to faculty describe the skills they use when teaching with primary sources and the expertise that they hope special collections professionals possess. The authors feel that these abilities are widely generalizable and that they will enable the successful use of the "Guidelines for Primary Source Literacy" in teaching with such sources. Many of these skills resemble those described by special collections professionals in the literature on primary source literacy.

Throughout the interviews, faculty described specific pedagogical, technological, and interpersonal skills that they employ as they engage undergraduates with primary sources. Some interviewees mentioned knowledge and abilities that were specific to their own discipline, such as proficiencies with foreign languages or paleography, or they discussed skills that they employed in teaching specific assignments (for example, demonstrating for students how to "cold contact" potential sources for oral history or document-gathering projects). Most of the skills and abilities discussed by interviewees, however, apply to teaching with primary sources in a variety of settings and disciplines. In addition to discipline-specific and general pedagogical capability, faculty also mentioned attitudinal or communication-based competencies that contributed to successful integration of such sources in their own teaching.

Faculty also commented on the knowledge, skills, and abilities that they expect special collections professionals to possess in support of primary source instruction and faculty and student research. These expected competencies were primarily focused on library-centric knowledge, particularly familiarity with collections and mastery of

search tools. For example, respondent 6 noted the importance of bringing students to the library to meet with “an expert in the collections that are [in] the Harold B. Lee Library specifically.” Faculty also discussed the importance of special collections professionals’ pedagogical and interpersonal skills for successful primary source instruction, mirroring their accounts of the knowledge and abilities they use as teachers.

Faculty interviews elicited some differences between the perceived competencies necessary for faculty and special collections professionals, but the commonalities expressed in the interviews can be broadly grouped into three categories: (1) domain knowledge and primary source skills; (2) pedagogy and instructional design skills; and (3) communication and soft skills. Domain knowledge encompasses the discipline-specific skills and abilities that faculty and special collections professionals use when teaching with primary sources, for example, a deep knowledge of historical eras, figures, or events; paleography and language proficiency; and a knowledge of how different types of historical materials were created and transmitted. Pedagogy and instructional design skills pertain to the techniques faculty and special collections professionals employ to teach with primary sources, including designing assignments and learning activities. Communication and soft skills capture faculty descriptions of abilities and attitudes that foster successful teaching and learning with these sources. Openness and enthusiasm were major subthemes mentioned in the interviews.

The commonalities in skills and knowledge mentioned by faculty and special col-

An identifiable set of core competencies may be essential for those engaged in undergraduate primary source pedagogy.

lections professionals alike suggest that an identifiable set of core competencies may be essential for those engaged in undergraduate primary source pedagogy. In the following sections, the authors discuss the three categories of competencies and suggest specific skills that pertain to teaching by faculty and special collections professionals.

Faculty Competencies: Domain Knowledge and Primary Source Skills

These competencies comprise familiarity with disciplinary knowledge and scholarship related to primary source materials and an understanding of how special collections and archives function, including how to find materials. Faculty’s domain knowledge allows them to find, evaluate, and select primary sources to integrate into their courses. Though interviewees gave examples of using such sources in both lower and upper division courses, they most frequently cited aligning their own areas of expertise with upper division undergraduate courses, where they have more freedom to customize a syllabus around their current research interests than they would with introductory courses. Faculty frequently mentioned identifying appropriate sources by relying on their domain knowledge and using strategies honed from their own experience as researchers. A typical method was described by respondent 3, a literature professor, who said, “It always starts with the syllabus and what we’re reading, and then I just go through . . . the library’s website and Special Collections list of . . . what’s in the collections to see what might be around that lines up with what I’m teaching.” Faculty also mentioned

using their disciplinary expertise and experience to identify databases, online resources, and other physical or digital repositories where they can access primary sources. The interviews cited a wide variety of portals and resources, including specific primary source databases licensed by the Lee Library, full-text sources such as HathiTrust and Project Gutenberg, and digitized collections at other institutions both inside and outside the United States.

Domain knowledge also allows faculty to contextualize primary sources and assist students who may have little, if any, prior experience working with such sources. Professors are especially attuned to their students' lack of experience with archival sources. They mentioned needing to teach undergraduates the difference between primary and secondary sources, to introduce the terminology used for primary sources in their field, and to explain their learning objectives for bringing such sources into the class. They frequently described needing to assist students due to a lack of language skills, difficulty reading handwritten documents, or unfamiliarity with the conventions of specific genres of documents (for example, a faculty member mentioned that her students often had trouble citing digitized newspapers). In some cases, faculty must provide students with discipline-specific contextual information for them to successfully interpret sources. For example, a professor who designed a research assignment involving fifteenth- and sixteenth-century books of hours walks his class through an exemplar in the library to demonstrate the visual and textual features and patterns within these devotional books. He then distributes a handout to help students identify those features when they perform their own research. Another faculty member described using his scholarly expertise to produce an annotated version of a Special Collections finding aid with additional information about the significance of items in the collection. He provides copies to his students as they work on research projects to help them identify relevant material in the archives.

This latter example suggests another important competency employed by faculty: their own knowledge and expertise in using special collections and archives. As noted previously, faculty often bring primary sources into the undergraduate curriculum because of their positive experiences with such research as students or in their professional career. Some, like the faculty member who created the annotated copy of the finding aid, are expert users of the Harold B. Lee Library's collections. Whether they use its collections or materials held by other institutions, faculty draw from their own experience to design learning experiences and to guide students through the process of working with primary sources. They also use their research skills and knowledge to steer students to appropriate materials, repositories, databases, and other tools.

Faculty often bring primary sources into the undergraduate curriculum because of their positive experiences with such research as students or in their professional career.

As faculty teach with primary sources, their experience as researchers may inform how they design learning activities and how they introduce students to primary source research. Faculty commented frequently on the ways their classes struggle as novice researchers. They observe that students can get overwhelmed by historical materials and the research process and often fail to understand how to use library search tools

effectively. “They just don’t have the depth of . . . knowledge that I have, [and] there’s no reason why they should,” noted respondent 17. To assist their students, faculty often demonstrate search tools and strategies in class or in one-on-one consultations with undergraduates. They steer students to repositories and portals to help them identify credible, appropriate sources. Some inform the students of what to expect when they come to the Special Collections Reading Room, such as needing to allot time for physical items to be retrieved or to sift through cartons of manuscript material.

Another important skill set for faculty is managing students’ expectations about the research process. One faculty member, respondent 11, described teaching students that research is an iterative process, explaining that she often characterizes it as

a kind of self-motivated finding, right? Because what happens in the course of doing primary research is that you have to start hypothesizing potential avenues to go down . . . My goal is to find X, I think I can find it here. You go there, and you can’t find it. What you then have to do is start branching, right? Okay, then I’m going to revise my thinking, maybe I need to revise my search terms, maybe I need to try a different database, [or] maybe I need to go this way instead of this way, right? That kind of, like, mapping out or strategizing how to get information.

The same professor also noted that she often finds it necessary to teach students to weigh primary source evidence against their perceptions of what should exist in the historical record:

Many students will come to me and say, “I spent six hours yesterday and I couldn’t find anything on X.” And I will say, “What the heck do you mean you cannot find any sources? You have like a billion resources in these databases and you couldn’t find anything?” . . . But in their mind, it doesn’t work, it’s not the right resource, right? So that’s the number-one complaint or the number-one challenge is “I can’t find X,” but what that means in their mind is “I’ve already decided what data should be there, and the data isn’t cooperating with me and so I’m getting frustrated,” right? So, you sort of have to teach the students how to collect the data and then interpolate or analyze from the data rather than making a thesis claim and then try to find the data that [support] it.

Faculty members’ competence with primary source research is vital for helping novice undergraduates to discover resources and learn how to successfully integrate them into their research according to disciplinary norms.

Faculty Competencies: Pedagogy and Instructional Design

The competencies in this category include a focus on developing research skills rather

Faculty members’ competence with primary source research is vital for helping novice undergraduates to discover resources and learn how to successfully integrate them into their research according to disciplinary norms.

than just doing an assignment; an ability to formulate clear learning objectives for primary sources, including language with which to describe using and thinking about such sources, either disciplinary-specific terms or wording gleaned from interactions with archivists and special collections librarians;

an ability and willingness to scaffold assignments; and a readiness to model the research skills that they teach.

Domain knowledge and an understanding of primary source research motivate faculty to incorporate such sources into their teaching and to guide novice students through the research process. Yet disciplinary expertise alone does not guarantee a successful teaching and learning experience. Faculty need to intentionally design learning activities to foster productive student encounters with primary sources. While nearly every faculty member that the authors interviewed indicated that they were “winging it” when they began teaching with primary sources, “exploring and figuring stuff out as [they] go,” faculty did tend to use several pedagogical strategies and objectives that they refined over time. Their descriptions of teaching successes and failures suggest key competencies that instructors can employ to create effective learning experiences.

The first competency is the ability to identify and focus on the key skills and outcomes faculty hope to impart by teaching with primary sources. As discussed earlier, teaching with such sources is an important way for them to impart disciplinary research skills. Several faculty commented on how teaching with such sources also allows them to get beyond generic term paper assignments and help students build critical thinking and writing skills or an interest in lifelong learning.

As faculty think about the skills they are trying to teach, they develop learning objectives tied to lectures, readings, assignments, and other course activities using primary sources. These learning objectives are often linked to disciplinary or institutionally required learning outcomes. As faculty create learning objectives and outcomes, they analyze the knowledge, skills, and abilities they want to impart to students and choose appropriate activities that will allow them to teach and assess student learning. When teaching undergraduates with primary sources, faculty need to be intentional about the skills they target and to select learning

When teaching undergraduates with primary sources, faculty need to be intentional about the skills they target and to select learning activities and sources that advance their instructional goals.

activities and sources that advance their instructional goals. As discussed earlier, scaffolded pedagogical approaches to primary sources are an effective way to introduce undergraduates to those materials and to break the research process into manageable steps for inexperienced students. Faculty need the ability and willingness to scaffold and model the skills they want to teach, whether through giving multipart assignments, curating or limiting primary sources and research portals, or walking students through the research process in classroom settings or in one-on-one consultations.

Creating learning objectives or learning outcomes is only a first step toward effective teaching with primary sources. Faculty also need to communicate their goals to students and other instructional partners, including teaching assistants and special collections professionals.

Faculty Competencies: Attitudinal and Soft Skills

These competencies include a willingness to negotiate with special collections professionals about class time spent on developing skills and enthusiasm for using primary



sources. The faculty interviewed are zealous users of such sources in their own professional practice and find satisfaction in sparking students' intellectual curiosity through introducing them to such sources, whether physical or digital. This enthusiasm promotes positive student learning experiences—several interviewees mentioned favorable student feedback, including good end-of-semester ratings, due to Special Collections visits and interactions with primary sources. An affinity for teaching with such sources also helps faculty to push through the challenges they face, from designing learning activities through “trial and error” to balancing teaching content with time constraints.

Along with a positive attitude toward teaching with primary sources, faculty described an attitude of openness to communication and collaboration with special collections professionals as a soft skill that contributed to their success as instructors. Faculty shared their experiences bringing students to the library for hands-on encounters with primary source material or library instruction. Several professors relied completely on librarians and special collections professionals to provide coaching on using library collections, databases, and search tools. A few mentioned covering search strategies in class and expecting students to go to the library on their own. Others brought students to the library for instruction and introduction to collections, and then reinforced the primary source research process in class and during student consultations. Some of the most successful library visits, however, involved deeper collaboration between an instructor and a special collections professional. These faculty saw the benefits of close communication about selecting primary sources to use in the classroom, discussing learning goals for the library visit, or even working with special collections professionals to design instruction sessions and assignments. Faculty needed to be open and willing to negotiate time for instruction and to discuss their learning objectives and expectations to foster successful interactions between students and primary sources.

Special Collections Professionals: Primary Source Knowledge and Skills

Important competencies in this area are knowledge of the subject area; expertise in using primary sources; and familiarity with the holdings of the repository. As part of the Ithaka S+R project, interviewers asked whether faculty work with others to provide instruction on research with primary sources—for example, co-instructors, teaching assistants, and special collections professionals. These questions, as well as a series of queries about how faculty and students find and access sources, provided important information about faculty interactions with special collections professionals in support of their teaching and research. Eleven of 17 respondents affirmed that they arrange for a library visit or instruction session for their undergraduates. Many faculty described how they partner with the library for primary source instruction and how librarians and special collections professionals contribute to their teaching practice. Most commonly, they declared that librarians and special collections professionals should be what respondent 15 called “subject matter experts” with deep knowledge of the contents of collections and how to find and access library material.

Faculty expect librarians and special collections professionals to suggest or select appropriate sources for their students to work with, based on their knowledge of the library's holdings. Several respondents mentioned contacting special collections pro-



professionals to ask about primary sources for their own research, and they encourage students to do the same. Respondent 4 reported that a successful practice “in [his] own research is, and something that students are less willing to do, is just go talk to the archivist [and] say, ‘What do you suggest?’ Because archivists . . . point to those moments of most interest or the most influential portions of a collection in a way that the library finding guides don’t.”

Several faculty indicated that they rely on librarians to take the lead in selecting sources for instruction, primarily for library sessions or presentations, but also to use in class. Respondent 5 noted that, when finding primary sources with which to teach, “I rely on the librarians to be honest. I don’t have time to sit and look up what you have and think, ‘Oh, will this help?’ I just go, ‘Okay, this is what I need, what do you have that would fit that?’” Other respondents described with satisfaction past experiences when special collections professionals provided lists of potential sources for them to consider as they developed assignments or collaborated with them on choosing items to use in a hands-on instruction session. For example, respondent 3 described such cooperation at her previous institution:

[When] they got new things into their collection, [the librarian] would e-mail me and say, “Hey, we got this new thing, you know, I’ll bring it in when we bring your students over.” So, we would kind of fine-tune the range of examples that she was bringing [to the instruction sessions], for instance, and adjust that for a little more flexibility depending on the class.

Since librarians and special collections professionals may interface with faculty teaching across multiple disciplines on a wide variety of topics, it is important to have deep knowledge of library collections and to problem-solve how to apply them to different teaching and research contexts. Special collections professionals also need to keep abreast of research and teaching trends in the disciplines. They should discuss or even anticipate student and faculty interests and identify materials that meet their teaching or research needs. Faculty members do not always expect librarians and special collections professionals to have the same level of expertise they have in their area of scholarship, but they do appreciate their knowledge and expertise related to primary sources, such as provenance, formats and physical features, or how such sources were manufactured or created. Respondent 17 explained,

That’s why I like going in for show-and-tell and having a . . . curator there where we can bounce off each other. I often have a greater depth of literary, historical knowledge than somebody at the library could be expected to have. And I can provide different kinds of color commentary about why these different things are significant within a writer’s career or within the larger period or what have you. But when it comes to, you know . . . You look at this thing and how many signatures in it or . . . what can you tell by how it’s sewn or, you know? What kind of illustration is this, and why does that matter? Or anything like that, you know. I’ve learned a lot over the years.

Faculty expect librarians and special collections professionals to suggest or select appropriate sources for their students to work with, based on their knowledge of the library’s holdings.

Special Collections Professionals: Instructional Design and Pedagogy Skills

Important competencies for special collections professionals include the ability to instruct on the use of library search tools; to teach or model search strategies; to know and teach information literacy, primary source literacy, and related standards; to design learning experiences, such as one-shot instruction, lectures, exhibits, and active learning; and to communicate with faculty about their instruction goals.

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The majority of faculty interviewed reported that they rely on special collections professionals and librarians to provide their students with search instruction and introductions to special collections and archives.

professionals and librarians to provide their students with search instruction and introductions to special collections and archives. Some bring their classes to library instruction sessions and then formally or informally reinforce library search techniques later in class or during consultations with students; others rely exclusively on library instruction sessions or presentations to cover this material. A typical scenario was described by respondent 14, who assigns students to work with the rare book collections:

We come over to the Special Collections library, and the curator there gives a great presentation introducing them to these periodicals so they know what they're looking for and what the, you know, what the physical process is . . . filling out a form to be admitted to the Special Collections Reading Room and how to request materials there, how to handle them in the Reading Room . . . all of that, and that quells a lot of fears.

Respondent 7 described his approach as "I'm trying to get [my students] to identify a topic that they have passion for, and once they find it, then I will have them [select sources] through having archivists train them, and also I'll try to assist them at finding what's out there." Other faculty mentioned how curators walk students through the use of search tools such as the finding aids database and provide handouts and other materials for students to continue research outside class. While some respondents cover search strategies as part of their in-class instruction, librarians and special collections professionals are most often expected to be experts on using their repositories' search tools and strategies, just as they know the contents of their collections. It is important for special collections professionals to model for faculty and students how to find those primary sources.

As suggested by the growing body of literature in the library and archives profession on primary source literacy and instruction, special collections professionals need to build competencies related to pedagogy, beyond teaching how to search for information. With the advancement of the SAA-ACRL / RBMS "Guidelines for Primary Source Literacy" and ACRL's Framework for Information Literacy for Higher Education, library professionals need to teach techniques for identifying and using primary sources. As discussed earlier, faculty also try to impart such abilities to their students. Librarians and special collections professionals should partner with faculty to design learning activities and experiences that teach these skills and meet faculty goals for successful student engagement with



primary sources. Faculty spoke positively of exchanges where librarians and special collections professionals discussed their learning objectives and goals for bringing students to the library for instruction and introductory experiences. Many had complimentary things to say about efforts by Lee Library faculty to design learning experiences with the materials and to work closely with them to plan instructional experiences in Special Collections. They mentioned active learning experiences, such as exhibit creation; assignment design workshops hosted by Special Collections; and curators and librarians who suggest ways to engage students with primary sources and help them practice critical thinking and other primary source literacy skills. Pedagogical competencies allow library professionals to aid faculty in discovery, assignment design, and teaching students how to use primary sources. All the successful examples of teaching with such sources brought up by the interviewees involved collaboration between a faculty member and a special collections professional. Professionals and faculty need to work together, sharing their respective knowledge, skills, and abilities, to design successful primary source assignments.

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Special Collections Professionals Competencies: Soft Skills

Competencies listed in this group include approachability and responsiveness to faculty and students; an ability to communicate with instructors about new materials in the collection; outreach; honesty about collections and access; a willingness to host students in the repository and talk with them about how to use materials; and a readiness to facilitate educational experiences, such as exhibits and lectures.

Interviews with faculty reiterate the importance of librarians and special collections professionals possessing soft skills relating to communication, openness, and enthusiasm. They appreciate librarians and special collections experts being approachable. Respondent 11 noted “the importance of having really responsive librarians” available to help both faculty and students with research. Instructors encourage their students to talk to special collections professionals, as respondent 2 related: “I try to convince [students] that librarians like it when people ask them for help. It’s, like, one of their favorite parts of their job.”

Faculty appreciate when librarians and special collections professionals let them know about library materials and services related to their teaching and research interests. “It is helpful to have the librarians reach out episodically to remind faculty of the resources that are available, of the services that can be provided, how to have the students there,” respondent 12 observed. Faculty are also grateful when special collections professionals intentionally acquire primary sources to support their instruction and class assignments.

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One aspect of open communication commented on by faculty included honesty about the strengths and weaknesses of collections, which gives them clarity about whether library holdings will support their teaching and research activities and whether class visits would be worthwhile.

Faculty indicated great appreciation for willingness and enthusiasm on the part of library staff for hosting and teaching their students, and, in turn, strongly recommended the library to their peers. Respondent 1 advised new faculty to “look into what Special Collections has that pertains to their class and to not just assume, as I probably would have done, that there would be virtually nothing.” Respondent 17 recommended “collaborating with our allies at the library who are really eager to get students in there discovering the collections.” Interviewees acknowledged that, while it is important to have conversations with special collections professionals about teaching with primary sources, it is even more important to invite them to participate actively in the actual teaching and modeling of research utilizing those sources.

Special collections professionals understand primary sources and how to use them. They also know what materials are available in their repositories and how to find them. Developing competencies related to pedagogy and instructional design and communication and related soft skills allows librarians and special collections professionals to build on their existing domain knowledge and primary source abilities to fully partner with faculty in support of student success.

Conclusion

Faculty want to teach with primary sources. They value the skills that such sources help students develop, and they recognize the excitement that the sources can generate in their teaching. They have little training, however, in how to successfully teach with primary sources. The interviews generated at Brigham Young University through participation in the Ithaka S+R project on “Supporting Teaching with Primary Sources” provide rich insights into the competencies that faculty utilize when teaching with primary sources. They also illuminate some of the expertise that faculty value in the special collections professionals with whom they work. These competencies mirror those described in the literature on primary source literacy.

The competencies identified by the faculty interviewed at Brigham Young University apply broadly to special collections professionals and instructors across a wide spectrum of institutions. These skills enable students to benefit from rich learning experiences that leverage primary sources. The “Guidelines for Primary Source Literacy” identify competencies that can be taught using such sources. They also provide language for communicating what those skills are. Knowing what can be taught with such sources is only one part of the equation, however. This article identifies the core competencies that are necessary to teach primary source literacy and breaks them down into manageable groups, both for special collections professionals and for faculty. These competencies include the areas of (1) domain knowledge and primary source skills; (2) pedagogy and instructional design skills; and (3) communications and soft skills. In examining how these areas relate to faculty and to special collections professionals, the authors hope to open a dialogue about which competencies to prioritize and how to help both faculty and special collections professionals leverage them.

The article also examines two techniques that faculty at Brigham Young University find particularly effective for teaching with primary sources, scaffolding and modeling. When these techniques are used in partnership with the competencies identified, they enhance the student learning experience.

Special collections professionals and faculty need to work collaboratively to develop training opportunities to enable both groups to acquire and refine the competencies to teach primary source literacy. Such instruction should be both institution-specific and profession-wide. The authors hope that this article will spark a conversation that will lead to greater understanding of the best ways to help faculty and special collections professionals develop proficiency in the identified competencies. The authors also expect that this dialogue will help the profession further refine the competencies necessary to teach primary source literacy.

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