Openness in the Archives: Educational Equity and Primary Sources

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abstract: Academic libraries and colleagues within the larger educational sector commonly prioritize educational equity and affordable course content. While higher education frequently incentivizes open pedagogy and open-educational resources (OER), primary sources should also be cultivated as freely available resources that foster engagement, critical thinking, and historical inquiry. Blending both the theoretical and the practical, this article covers definitions, research, and case studies from teaching archivists representing five institutions at different stages of implementing primary source instruction programs. This article provides archivists and librarians with the language and inspiration to advance conversations with their teaching faculty collaborators in furtherance of educational equity.

Introduction and Definitions

Supporting educational equity and the need for affordable course content are frequently highlighted as strategic priorities for academic libraries and broad swaths of the education sector. As frequently cited, student out-of-pocket costs for textbooks increased nearly 41 percent between July 2011 and May 2018, according to the Consumer Price Index. Despite decreases between 2018 and 2020, prices as of January 2023 were again up over seven percent.[1] The average postsecondary student spent between $628 and $1,200 annually for books and supplies during the 2021–2022 academic year. Furthermore, 25 percent of students reported that they had to work extra hours, and 11 percent even reported skipping meals to afford their books and course materials.[2]

In an effort to curb the student cost burden, open-access journals, textbooks, course modules, videos, open pedagogy, and open educational resources are often discussed and incentivized within academia. The *Recommendation on Open Educational Resources*

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(OER), adopted by the United Nations Educational, Scientific and Cultural Organization (UNESCO) General Conference in 2019 defines open educational resources (hereafter called OER) as "learning, teaching and research materials in any format and medium that reside in the public domain or are under copyright that have been released under an open license, that permit no-cost access, re-use, re-purpose, adaptation and redistribution by others." They further implicate a wide variety of stakeholders for doing this work to include, but not be limited to, educators, educational institutions, policy makers, IT infrastructure providers, governmental bodies, and cultural institutions (such as libraries, archives, and museums) and their users.[3] Commonly cited examples of OER include textbooks, full courses, syllabi and lectures, podcasts and videos, and classroom activities. Given their potential to enhance student learning and lower educational costs, why are the vast troves of physical and digitally accessible primary sources which exist in libraries, archives, and museums across the globe not included in this list?

As practicing archivists with primary source instructional responsibilities, the authors posit that the main reason for this lies behind the sometimes-dubious copyright status of primary source collections found in these repositories.[4] Sometimes collections lack deed-of-gifts because donations occurred before the formation of the official repository or were found abandoned in attics. Sometimes the content of records brings into question privacy or other legal concerns that raise ethical questions about providing wide-ranging access to those records. In other cases, repository staffing levels and expertise simply do not support the work necessary to thoroughly investigate status. These are all legitimate concerns and certainly must lead to a hesitancy to provide broad-ranging open access to collections for "re-use, re-purpose, adaptation, and redistribution." The authors posit that instead, many teaching archivists likely fall closer to the belief that utilizing primary sources in the classroom as affordable course material reduces cost for the student, but the content is not necessarily open. In their 2012 article "Obstacles to creating and finding Open Educational Resources," Isabelle Brent, Graham Gibb, and Anna Gruszczynska instead advocate for adoption of the term "gray OER." They qualify these as "resources that have been created and/or deposited with the intention of being shared within an institutional context yet lack the distinctive features of OERs such as a creative commons license."[5] Examples include physical items placed on course reserve or digitally accessible via a course management system, digitized collections only accessible within the institution, and library-owned or licensed resources such as primary source collections available through database subscriptions.

Other applications of this work fall closer to open pedagogy. The term has many definitions, but the authors prefer to use Christina Riehman-Murphy and Bryan McGeary's definition, as outlined in the "Open Pedagogy Project Roadmap":

> **[W]e** are defining open pedagogy as projects or assignments which have the characteristics of: engaging with students as creators of information rather than simply consumers of it; experiential learning in which students demonstrate understanding through the act of creation; inviting students to be part of the teaching process/participating in the co-creation of knowledge; moving away from single-use assignments in favor of situated, collaborative, and renewable ones; student agency in deciding if and how their work is shared.[6]

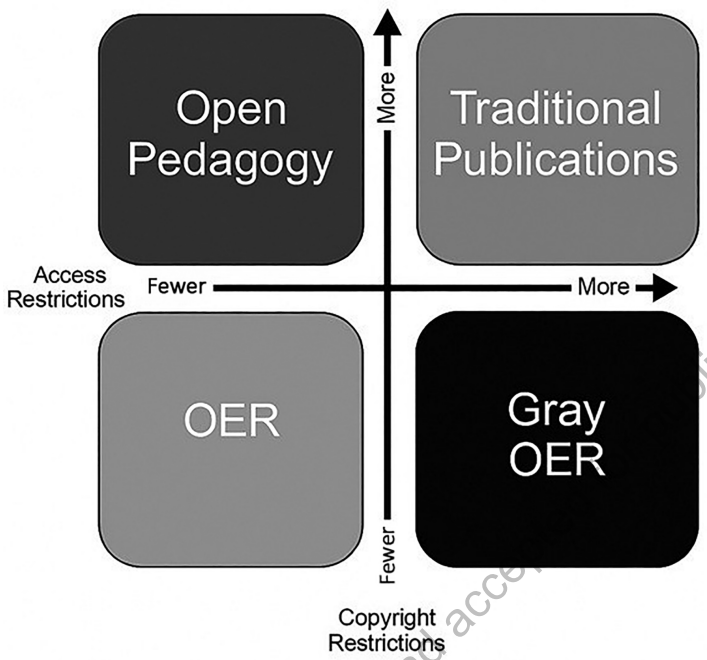

Figure 1. The varying degrees of openness for OER, gray OER, and open pedagogy in comparison to traditional publications.

Open pedagogy is related to but distinct from open educational resources. Both share the ideal of "openness"—materials that are in the public domain or created under an open license, but open pedagogy refers to the method of teaching, rather than the materials themselves. Figure 1 illustrates the varying degrees of openness for OER, gray OER, and open pedagogy in comparison to traditional publications.

Given that on an almost daily basis, instruction archivists and teaching faculty utilize primary sources to design instruction sessions and class assignments based upon primary sources freely accessible in their archival collections, this article seeks to provide a practical link between teaching with primary sources and the movement toward affordable course content in higher education. Offering definitions, recent research on the topic, and case studies focusing on training workshops for teaching faculty and course implementation examples from K-12

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through the postsecondary level, this article will offer a spectrum of examples that include open pedagogy, gray OER, and OER as strictly defined. The intent is to give teaching archivists and librarians the language to more confidently suggest primary sources in these conversations with instructors but also demonstrate that there is a wide range of implementation scenarios that can have a positive impact on educational equity.

Literature Review

Over the last two decades, a vast trove of literature has been published on integrating primary sources into the classroom. The majority written from the archival perspective focuses on four main areas: establishing the role of the archivist in instruction, exploring relevant pedagogical theory and literacies, assessing impact and learning outcomes, and diversity and inclusivity in primary source instruction.[7] Furthermore, case studies documenting what instruction sessions and course collaborations look like in practice abound in professional journals such as the *American Archivist*, *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage*, *Journal of Archival Organization*, and in edited volumes such as *Past or Portal? Enhancing Undergraduate Learning through Special Collections and Archives*, *Using Primary Sources: Hands on Instructional Exercises*, and *Educational Programs: Innovative Practices for Archives and Special Collections* and *Teaching Undergraduates with Archives*.[8] One discussion that remains surprisingly absent from the literature however, is an intersection between teaching with primary sources and the need for affordable course content and open educational resources, which is a service commonly provided through academic libraries and covered prolifically in both education and library professional literature.

Similarly, the literature focused on affordable course content and OER rarely includes primary sources in the discussion. A frequent theme is the impact of OER on student success. In the largest study of its kind to that point in 2015, Lane Fischer, John Hilton III, T. Jared Robinson, and David Wiley analyzed the results of a multi-institutional study of nearly 5,000 students enrolled in courses utilizing exclusively OERs in comparison to a control group of nearly 11,000 who used conventional textbooks. The study observed that students in the OER courses enrolled in a significantly higher number of credits the next semester (the authors posit because of the cost savings), and in three important measures of student success (course completion, final grade of C or higher, and course grade) performed equal to or better than students in the conventional courses.[9] Three years later, in a larger study of nearly 22,000 students, Nicholas Colvard, C. Edward Watson, and Hyojin Park similarly observed a statistically significant improvement in end-of-course grades and a decrease in D, F, and withdrawal grades. They concluded by describing the implementation of OER in courses as "an equity strategy for higher education... to level the academic playing field in course settings."[10]

Numerous other studies have examined faculty and student perceptions of OER usage. Focusing on small-scale institutional studies, authors such as Tarah Ikahihifo, Kristian Spring, Jane Rosecrans, and Josh Watson in 2017 observed at Reynolds Community College in Virginia that students who "participated in the study believed the quality of OER was better than that of traditional textbooks" and also "reported feeling more engaged with open materials because of the interactivity these facilitated." The

authors further noted that students utilized the cost-savings of OERs to "reinvest in their education."[11] A study at the University of Georgia of pre-service teachers found that "[w]hen students were offered a traditional textbook option, most declined to purchase it, and if they did, they did not use it on a regular basis." By comparison, those "who used instructor-curated OER and no-cost materials were overwhelmingly positive about the benefits of this instructional approach; the cost savings, easy access, and relevant content...."[12] Another pilot program at Viterbo University introduced OER across a wide-range of disciplines, then surveying both the faculty and students involved regarding their perceptions. According to the article's conclusion, the faculty reported "a positive experience with OER, resulting in the belief that although the course design work required a large time commitment, students significantly benefitted via cost savings, while also maintaining the quality of the learning experience. Student responses echoed this observation, with the majority agreeing that they experienced significant cost savings, while the quality of these materials met their expectations."[13]

One area where a convergence of the topics of affordable course content and primary sources has begun is focused on the GLAM (galleries, libraries, archives, and museums) sector, and specifically the Open GLAM movement which seeks to provide access to digitized cultural heritage objects as OER.[14] In the 2015 article "Opening Access to Collections: The Making and Using of Open Digitized Cultural Content," Melissa Terras focuses on the research potential of digitization efforts alongside the Open Access Movement. The author notes that "increasingly open licensing of digital cultural heritage content is creating opportunities for researchers in the arts and humanities for both access to and analysis of cultural heritage materials."[15] Furthermore, while Roger Gillis's 2022 book chapter "Open GLAM as OER" aligns the OER movement with primary source literacy, it focuses exclusively on primary sources that meet the strict "re-use, re-purpose, adaptation, and redistribution" of OER and discusses ways these materials can be used to teach primary source and copyright literacy.[16] The potential for economic impact on students, however, is not a major focus for either author.

While not the specific focus of this article, Marco Seiferle-Valencia's 2020 article "It's Not (Just) About the Cost: Academic Libraries and Intentionally Engaged OER for Social Justice," argues that while OER can create a more equitable playing field for students in terms of cost and student success, libraries doing this work can also "easily prioritize diversity and inclusion as central goals of OER practice alongside these other goals." The author's examples for implementation include the suggestion to "expand and complicate regional histories by centering archival records documenting the lives and times of people with marginalized identities." Brief case studies include a course assignment re-centering the activism of Anna Murray Douglass (wife of Frederick Douglass) utilizing primary sources available through the Library of Congress and the archives of Douglass descendants. Through activities, students learned more about Anna but also "the implicitly sexist omissions of the dominant storyline." In another course required for Spanish majors, students utilized local restaurant menus and other open resources about the Columbian food exchange to create a meal.[17] While Seiferle-Valencia primarily centers the social justice rather than economic implications for using OER, the author does highlight another important rationale for integrating primary sources into instruction—the ability to combat settled narratives and center the voices of individuals previously underrepresented.

While perhaps not considered professional literature, one place where primary sources do periodically appear in the conversation surrounding affordable course content and OER is in library LibGuides about how to find and evaluate affordable course content and potential OER. Targeted at instructors, these guides typically include guidance and examples.[18] While many stop at examples such as open textbooks, courses, lectures, and videos, some do include primary sources amongst these lists. For example, a guide from the University of Nevada, Reno Libraries includes links to the Digital Public Library of America, the Library of Congress, New York Public Library, Getty, and the Smithsonian, amongst others.[19] A guide from National University includes links to the digital gateways Canadiana and Europeana, while Old Dominion includes a link to explore local collections through their Libraries Digital Collection portal, which includes digitized primary sources from both their Special Collections and University Archives.[20]

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Along these lines, Ithaka S+R's 2021 report, "Teaching with Primary Sources: Looking at the Support Needs of Instructors," includes a call for further exploration of possible linkages between OER and primary sources in a section of the report focusing on textbooks. The authors posit that while many instructors turn to primary sources to alleviate what they see as textbook "shortcomings," such as questionable interpretation and representation in the content, in many cases they also do so because of concerns about cost. The Ithaka report authors note that these instructors see "primary sources available through the library, either through its physical collections or digital subscriptions, as a way to remedy this growing cause for concern....Used in this way, primary source collections resonate strongly with the growing movement behind the creation and adoption of open educational resources… and future work can elucidate the potential synergy between the two."[21]

The published local reports which fed into the cumulative Ithaka study offer further details about the need for affordability at the institutional level. For example, at California State- Northridge where 55 percent of all undergraduates are need-based Pell grant recipients, 11 of the 15 instructors interviewed brought up concerns about the high cost of course materials that they see as an impediment for their students. The authors note that to minimize costs, instructors "try to incorporate free and low-cost materials whenever possible. In fact, most compile primary sources that they find in readers and textbooks, while conducting archival research, and from various sources on the internet, which they then distribute through the campus learning management system (LMS) or through other means like self-produced readers or photocopies." They note however, that "This is by no means an ideal workaround. Copyright and ADA accessibility pose challenges when acquiring and distributing course materials in this way."[22] Interviewees

from the University of Illinois, University of Arizona, and Indiana University similarly cited the prohibitive cost of textbooks and sourcebooks, instead turning to digital primary sources which they uploaded into their campus course management systems.[23] A history department instructor at Indiana University elaborated, "I would say a challenge I'm now thinking about is cost for undergraduates. So, in the World History class that I teach in, those books are extremely expensive. So, this is all PDFs that I just load to Canvas.... I mean, it's probably critical for like a biology textbook, but I just feel like for History, it shouldn't be a lot of money."[24] A recent small-scale survey conducted by the IU Libraries' department of scholarly communications supports this sentiment. It found that 20 percent of students reported taking fewer courses, nearly 30 percent didn't register for specific courses, and over 40 percent simply couldn't purchase the required course material due to cost concerns.[25]

Realizing that teaching faculty, at least to some extent, are already attempting to utilize primary sources in this way, it is incumbent upon archivists and librarians as their teaching collaborators to develop further knowledge and consider the integration of primary sources as OER in courses, thereby supporting student learning. The following sections offer several case studies in which teaching archivists have furthered this work on their campuses. The cases include faculty training workshop development and examples of course implementation.

Training Programs

Drake University: Building a Sustained Faculty Development Initiative in Primary Source Instruction

Drake University, a mid-sized private institution in Des Moines, Iowa, offers a blend of liberal arts and professional degrees across its seven colleges and schools. Though its university archives and special collections were formally established in 2013, the archives has quickly become an important resource for preserving the university's history. With a relatively small staff and limited resources, archives faculty and staff focus on strategic partnerships and innovative programming to extend the impact of its collections.

The project described stemmed from a growing need to integrate primary sources into the university's curriculum in a more coordinated way. The goal was to move beyond ad hoc, one-shot instruction sessions that were often provided for history and art history courses, and to develop a sustained, formalized instructional program for teaching with primary sources across disciplines. Doing so would create opportunities for deeper faculty engagement, allow students to interact meaningfully with archival material, and contribute to developing more affordable course content by reducing reliance on textbooks. To support this vision, the lesson plans would be published in Drake University's institutional repository. By making these resources freely

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available, the project would facilitate knowledge sharing and collaboration. Faculty could remix, adapt and build upon existing lesson plans by editing individual activities, reordering instructional sequences, combining materials from different disciplines, and customizing content to fit their specific pedagogical contexts and student needs. This approach would transform the lesson plans from static documents into dynamic, evolving open education resources that could continually be refined and expanded by the broader academic community.

Tying the project to library-wide goals and the library strategic plan was critical in garnering support. This initiative aligns closely with broader library-wide goals at the university, in particular a focus on instructional support and increasing the use of OER. Mapping efforts to the strategic plan also ensured the initiative was recognized as a priority within the university's larger academic mission and provided a way for the library's dean to advocate for the program at a higher administrative level. Embedding the project in the library's strategic goals helped secure institutional support, including buy-in from the provost's office and the university's Center for Teaching and Learning. While Drake's faculty librarians have been recognized for their work on OER adoption, the concept of using primary sources as OER was relatively new to them. Inspired in part by the program at Indiana University, which will be discussed next, this project was part of an effort to promote access to materials that support innovative pedagogy and was an opportunity for archivists and instruction librarians to be in dialogue about reframing how faculty viewed archival content. One of the project's goals was to make primary sources more accessible, discoverable, and integrated into classroom instruction, positioning archival resources as a central component of the university's commitment to OER.

Another key element of the initiative was the relationship-building process with faculty as well as university administrators. Initial outreach leveraged personal connections, including the deputy provost for academic affairs, a partner from previous projects. Despite administrative turnover and changes in campus priorities, persistence was crucial. Although early efforts to host a primary source workshop stalled, archivists remained focused on advocating for the program through university-wide calls for faculty development initiatives. The proposed program consisted of eight sessions throughout the semester, with early sessions introducing archival collections. Additional workshops would cover using collections as OER, annotation software, and developing instructional exercises. From there, faculty would conduct research within the library collections, create lesson plans, and join meetings for discussion and feedback.

Outreach to individual faculty members also played a major role. Some faculty were initially unfamiliar with how primary sources could be integrated into their syllabi, or hesitant due to the time commitment of a sustained faculty development cohort. Personal invitations and targeted communications to first-year seminar instructors helped build interest in the program. This gradual, one-on-one engagement resulted in a small cohort of faculty from a diverse set of departments, including journalism, law, English, and women's studies. The challenges encountered in recruiting faculty emphasized the importance of relationship-building in any library initiative. By nurturing these connections over time, archivists have continued to plant seeds for future projects, even beyond the initial scope of the program. For example, these relationships have fostered ongoing collaborations, including an oral history project and exhibit on the history of the neighborhood surrounding Drake University.

This initiative also highlights how archives can play a proactive role in fostering engagement with primary sources and open educational resources. While the program has experienced delays and reduced momentum due to shifting priorities, the archivist has maintained faculty interest and participation through careful relationship building and integrating the project into strategic planning efforts.

Indiana University - OER Sprints Program

While the main mission of the Indiana University Archives is to collect, preserve and make accessible records which document the activities of the administration, the research and teaching activities of faculty, staff, alumni, and student life, during the last decade another primary goal has been to support the academic curriculum on the Bloomington, Indiana campus. The teaching archivist collaborates with instructional faculty to identify relevant learning objectives and collections that support course goals, designs assignments, and leads instruction sessions. Class involvement ranges from one-shots to full semester collaboration, and courses range in size from 10 to 200. At the height of its instructional involvement prior to 2020, the University Archives regularly served over 30 separate departments across the university including the Eskenazi School of Art, Architecture and Design, the Media School, the Jacobs School of Music, the School of Education, and a wide swath of the College of Arts and Sciences, ranging from art history, to folklore, to history, to psychology. In addition to working with courses that approach primary sources from a historical and social perspective, courses also periodically utilize sources for creative inspiration, theoretical application, and analysis. While the teaching archivist only started marketing the use of primary sources as an opportunity to supplement or even replace at-cost course readings over the last few years, looking back it is apparent that teaching faculty were already doing this both intentionally and informally for longer.

As part of a library-led program on affordable course content, in 2020 the University Archives offered its first workshop targeted at campus teaching faculty and, at the time of this writing, wrapped the third iteration of the program. Approached from a collection-agnostic perspective, the workshop begins with an overview of definitions and then leaves time for active, guided collection exploration and discussion. In each iteration, prior to the workshop, the archivist pulled collection examples relevant to each instructor's course topic and then during the session gave each a set of guided prompts to consider during their exploration. For example, for the 2023 cohort the archivist pulled the following:

- for a linguistics course, a set of research notebooks documenting the everyday syntax of language usage in Indiana for the Linguistic Atlas project;
- for a gender studies course, a selection of campus student publications from the 1940s;
- for a Latino studies course, a selection of family folkways and traditions documented by undergraduate folklore students in the 1960s; and
- for an advanced algebra course, an algebra textbook from 1904.

As a result of these workshops and other outreach efforts, the archives has worked with teaching faculty in recent years to incorporate freely accessible primary sources into courses such as the following:

- FOLK-F141 Urban Legends**:** A 150-student course that explores the defining features of urban legends: their cultural history, themes and role as cultural commentary; their popularity on the internet, in the news, and in popular culture. The most recent iteration of the course utilized a digitized set of urban legends collected by folklore students at the University between 1959–1980. These legends were used as course readings for discussion throughout the semester leading to a mapping final project designed to draw conclusions about urban legend variant change over time.
- ENG-R 396 Queer Rhetoric and Public Issues: A three-week intensive freshman seminar course that examines multiple examples of historical and contemporary queer political rhetoric. The class visited the archives to work with three different publications from the local LGBTQ+ community during the 1970s and early 80s. The assignment involved comparing these local publications with others across the country available through JSTOR's Independent Voices project, which is an open access digital collection of alternative press newspapers, magazines, and journals, drawn from the special collections of participating libraries.

In each of these examples, primary sources from Indiana University library collections were freely accessible to the students, either through open access or subscription primary source databases or through local digital repositories. The OER replaced portions of course materials that otherwise would have come at a cost for students. While in the case of some of the primary sources used for these courses the "reuse" portion of the OER definition might have been tenuous given copyright and privacy concerns, in each instance the need for reuse was unnecessary given the course assignments. This also allowed for flexibility when identifying collections for course use. The intent behind the definition of gray OER fit these applications perfectly.

The following case studies will offer further detailed course implementation examples that vary along a spectrum of how strictly they adhere to the definition of open educational resources. The first, as the archivist explains, falls closer to the definition of open pedagogy, the middle is closer to gray OER, while the last aligns much more closely with the traditional definition of OER.

Implementation Case Studies

University of Connecticut: Teaching with Primary Sources and Open Pedagogy in First Year Writing Courses

This case study focuses on an archivist's instruction work supporting open pedagogy approaches in first-year writing courses at University of Connecticut using archival materials as gray OER. The outcome is the creation of new open projects by the students in these courses. First Year Writing, ENGL 1007—Seminar and Studio in Writing and Multimodal Composition, is one of three options students can take to fulfill the writing

general education requirement at the University of Connecticut and is offered at all university campuses. These course sections are small (16 students) and are often taught by graduate students. The course follows a standard curriculum and syllabus, which individual section instructors can personalize by choosing to focus on a specific theme or topic. There are upwards of 100 ENGL 1007 sections offered each semester, and these classes have come to represent a significant percentage of the archival instruction sessions taught at archives and special collections. Several of these classes include projects that follow an open pedagogy model.

Open pedagogy projects empower students to be information creators, which can increase engagement.

In this case study, the teaching archivist utilizes both archival materials as gray OER and traditional OER while supporting an open pedagogy approach to the process of teaching students how to engage with and reuse these materials in their open projects. Open pedagogy projects empower students to be information creators, which can increase engagement. Students often learn new skills through open pedagogy projects, which translate beyond that course or semester. If students choose to publish their work, they can link to that work on a resume for future employment or advanced educational opportunities. The emphasis of open pedagogy on engaging students as knowledge creators closely aligns with the learning objectives of "use and incorporate" outlined in the 2018 Society of American Archivists-Rare Books and Manuscripts Section (SAA/RBMS) *Guidelines for Primary Source Literacy* along with the Association of College and Research Libraries (ACRL) *Framework for Information Literacy for Higher Education* frame "Scholarship as Conversation," which encourages students to think of citation as a way of engaging with scholarship by acknowledging the contributions of others in the creation of new scholarship.[26]

First Year Writing courses aim to help students develop skills in writing, composition, digital media and design, and information literacy. It follows a studio model, in which students engage with course concepts during class time through project and focused learning, making the course a natural fit for hands-on sessions with primary sources. The majority of ENGL 1007 sections do not use textbooks and instead focus on materials that are free and openly accessible, so incorporating and framing archival sources as gray OER or OER also aligns with the low-cost and open nature of other course materials. Due to the course's focus on multi-modal composition and information literacy, many of the assignments in ENGL 1007 follow an open pedagogy approach. Examples of these types of assignments include podcast episodes, zines, and collage or photo essays, which may be published online. The First Year Writing curriculum also encourages five "habits of practice," which include various related learning objectives. Those "habits of practice" are:

- Collecting and Curating
- Engaging
- Contextualizing
- Theorizing
- Circulating.[27]

The First Year Writing habits of practice offer many connections between the program's curricular goals and archival sources as OER that students can incorporate into their open projects. The fifth habit of practice, "circulating," is the most closely tied to the ideals of open pedagogy, and indeed, to the creation and maintenance of OER, given its focus on "creating interactivity with the public" and "examining the consequences of broad circulation of words and ideas." Archival materials also offer opportunities to explore this habit of practice when students are asked to think about circulating materials like zines and community newsletters, and when they incorporate these sources into their own open projects.

Roughly half of the ENGL 1007 sections from the most recent semester have had an assignment directly tied to the instruction sessions offered by archives and special collections. These included: a podcast episode exploring a specific topic; a photo essay or collage essay using archival materials and original student photography; and zines based on archival research from the archives' zine collections. The library sessions are hands-on and generally focus on item analysis activities rather than searching activities using finding aids. Activities have included think-pair-share prompts, using item analysis to create a historical timeline, independent item analysis and reflection, and group discussion and reflection. Materials selected for inclusion in these sessions vary widely, based on the course themes or topics, and fall along a spectrum of accessibility from those that align more strictly to the definition of OER (which includes a Creative Commons license), to gray OER, which lack clear rights and reuse information. They generally include a mix of archival manuscript collection materials from the university archives, rare books and zines. Many of these materials are in the public domain or have been made accessible online using an open license. When selecting the archival materials for the course, the teaching archivist prioritizes physical materials that have already been scanned and made available online through the Connecticut Digital Archive (CTDA). Doing so not only makes these materials more easily accessible for students after class but also means that the materials included have already been reviewed for issues like copyright, removing barriers to the students' reuse of the materials in their open projects. For example, many of the materials from the university archives that are regularly used in these classes have been added to the CTDA under an attribution-noncommercial 4.0 international (CC BY-NC 4.0) license.

The importance of appropriately citing archival sources in students' open projects has emerged in recent semesters as an additional focus for the archival sessions, and something students have needed additional guidance on to be successful. The teaching archivist developed a handout to guide students through creating a citation for archival materials and including digitized sources from the CTDA that have a CC BY-NC 4.0 license helps to reinforce the importance of attribution, or citation, when working with these materials. Open projects are also a great way for students to better understand the value of citing

Teaching citation with archival materials also provides an opportunity for students to grapple with the complexities of walking the line between copyright and privacy laws, and the open licenses used in OER.

sources, beyond the scare tactics of being punished for plagiarism. In the archives instruction sessions with ENGL 1007 students, the archivist discusses that the reason for citing the materials is so that another researcher who sees the project online can use the citation to find and access the same materials. Teaching citation with archival materials also provides an opportunity for students to grapple with the complexities of walking the line between copyright and privacy laws, and the open licenses used in OER, because archival materials *are* often a gray area in terms of copyright, privacy, and use restrictions. Having students practice incorporating, reusing, and citing archival materials in the creation of their own gray OERs (these open projects), helps students better understand the value of OER that have clear open licenses, as opposed to the gray OER that primary sources can sometimes be. While student citations are not perfect, the goal of these entry-level classes is to get students to think critically about these types of writing practices.

While some students choose not to make their work publicly available, many have pursued some form of publication. For example, students from a fall 2023 section of the course created a class zine using archival sources and donated copies to the main library's loanable zine collection and to the archives and special collections' zine collection. In another class, each student published their individual photo essay on the history of a specific campus building online, incorporating both historical research and writing on the history of the buildings, as well as historic photographs from the university photograph collection.

These published projects fit best under the definition of gray OER because, although they are published with the intention of sharing the project, students have not explicitly published them under a Creative Commons license. As the teaching archivist continues to build relationships with the instructors and faculty of the First Year Writing program, incorporating additional instruction around creative commons licensing for student's open projects will be a long-term goal.

University of Memphis Archives as OER: Promoting Primary Source Literacy at all Education Levels

The University of Memphis Libraries' special collections department is committed to promoting information and primary source literacy in support of campus initiatives which seek to support educational equity. It seeks partnership opportunities with academic departments on campus to guide students and faculty using primary sources and archives in original scholarship, along with outside organizations to promote information literacy and resource sharing. The following case studies highlight an attempt to provide students with freely accessible curated archival material to ensure academic success for a women's history course and a professional development opportunity to empower regional librarians and information professionals to partner with K-12 educators and utilize open and available resources inside and outside collections.

History 4851: History of Women in America

The University of Memphis has no formal requirements for students to have information or primary source literacy as part of the undergraduate education, despite it being part of the English first-year composition and analysis course.[28] Faculty members, however,

often partner with the libraries for one-shot instruction sessions to give students skills to utilize information resources available through the libraries' print collections, databases, and government publications. Furthermore, some faculty librarians teach one-hour research seminars in the honors college, where they incorporate information literacy principles to provide a foundation for successful undergraduate outcomes. The special collections library has long hosted primary source literacy one-shot sessions in-house so students may gain some introductory experience with archival materials, how to utilize them for research, and how to cite them responsibly.

In 2015, a history department faculty member approached the special collections department to collaborate on creating an undergraduate digital humanities experiential learning project in an asynchronous classroom. The course, HIST 4851: History of Women in America, is meant to cover "the experiences and contributions of women to society in early and modern American history."[29] The archivist and the professor worked together to establish goals for the course, and, after several meetings and visits to the archives, a digital humanities project took shape. The professor devised seven topic areas to cover in the class and for student groups to explore: activism, civic life, domesticity, education, entertainment, media, and politics. The resulting semester-long student projects satisfied three of David Wiley's 5R activities (retain, reuse, redistribute) of OER.[30] The group projects became educational content examples for future classes building on elements of the open pedagogy movement, specifically constructionist assignments, noted in Wiley and Hilton's "Defining OER-Enabled Pedagogy."[31]

While details about course content were developing, the archivist had to select a digital library product that would accommodate the students who had no background in using or working with digital assets. The archivist had previously used the Omeka.net platform to create a digital repository for Memphis's oldest operating, privately owned business in the Beale Street entertainment district. This platform has repository and exhibition functions, and the archivist felt assured that this product could be used by students who had no prior experience with digital libraries. The libraries, however, utilized a content management system (CMS) through the vendor Innovative to make its digital archival holdings publicly available. Because there was little time between conceptualizing the course and executing the project with the students, it was apparent there would be little to no time to teach students to use the libraries' CMS. Given the time crunch, it was impossible to leverage this environment to allow an entire class to have access to create their digital libraries. As a result, Omeka emerged as the best option to address the limitations presented by the asynchronous environment and the institution's existing digital library product.

This was the first time the library partnered with an on-campus professor to create an experiential learning project with a digital humanities component for a university course. The professor required some type of scholarly expression from the students that created connections between topic areas and the archival material that they utilized. Small groups were formed, and students spent the semester integrating archival materials, course readings, and group research into a paper that would become part of the digital library they produced. The research papers that groups created were embedded into Omeka as introductions to group collections or added as digital objects to the repository. The repository would ultimately serve as an example of student output for the course in

future semesters. To prepare and equip students for the skills that they would need to produce the seven projects, the archivist agreed to be embedded as part of the course. This allowed students better access to the department for questions and learning archival practices and skills. At the time of implementation in 2015, the University of Memphis employed a learning management system (LMS) that lacked the capability to interface with students in real time. Utilizing the platform's message boards and communicating through email were a must to make this project a success. The professor was prohibited from requiring students to come to campus, but the archivist did create opportunities for students who wished to meet in person to receive hands-on training.

Students started the process by exploring other Omeka.net sites. This helped them become familiar with how the front end of the platform worked. LMS discussion boards gave students opportunities to provide input on the look of the final site and a forum to reach the archivist in both a group and individual capacity. Students had an "Ask the Librarian" discussion board with the option of creating messages within the LMS that went directly to the archivist. None of the students were familiar with digital repositories, so the archivist created a separate Omeka site to explain different functions of the site and to assist the students with how to use Dublin Core metadata. In addition to creating digital records, students also learned to embed their papers to become part of the repository. As a result, students gained value-added skills during this project.

Locating, curating, and digitizing resources for the student groups was the largest task for the archivist. The department has a history of under-processing collections that focus on the work of women, and as a result it was challenging to quickly locate relevant items that aligned with the thematic areas created for the class. The archivist relied on their own knowledge of the collections, case files, finding aids, popular newspaper morgues, and oral histories to compile relevant resources for the students. A graduate student assisted the department in digitizing almost 500 items and pages from manuscript and oral history collections. Zip files and the file sharing platform, Dropbox, were employed to share curated sets of archival materials with students. As part of their group assignment, students chose which resources supported their topic area's paper and the groups created digital records for each of the selected archival items. Then, the topic papers were published on the platform either through embedding the paper using an Omeka platform plug-in function or creating a digital record for the paper, which made the students' work downloadable. Of the approximately 500 items digitized for this project, 79 were added to the first site created for the course.

The project was challenging in terms of the time required, the restrictions of the freeware, and the volume of items selected to provide to the students. The archivist was somewhat limited in providing digital assets to the class. There were storage limits in the freely available versions of both Omeka and Dropbox. The graduate assistant assigned to help with preparing digital surrogates had no digitization experience and had to be trained on the basics of scanning resources for the class. At the beginning of the project efforts were made to create archival quality surrogates, but as the semester progressed the students' needs quickly impacted staffing capacity. Concerns about storage for the digital resources and providing student groups with plenty of options for their scholarship resulted in lower-quality surrogates that were produced, packaged, and distributed to topic groups.

Having the students learn to be and function as the creators of a digital library is an explicit act that falls under open pedagogy.

Despite the project being nearly a decade old, it persists as an early example of student-led work for the University of Memphis and the libraries. This project was interesting in that it provided students with an opportunity to satisfy the objectives of the course while learning new skills through working with digital archives. What resulted from these efforts were two classes' worth of efforts that students and faculty can revisit and learn from years later. Having the students learn to be and function as the creators of a digital library is an explicit act that falls under open pedagogy. The archives used in the project are made freely available to students and non-profit organizations. The papers that were created relied on both primary and secondary sources and were added to the digital library to satisfy course objectives. While the students did not apply Creative Commons licensing to their papers, they did utilize three of the five elements attributed to OER—retain, remix, and redistribute.

Special collections and the libraries have a history of providing students with long-term storage for physical undergraduate capstone projects. The department has provided previous examples of student work to students for decades. The "History of Women in America" course sites were the first digitally available student projects offered by the libraries, eliminating the need to request physical examples from the archives. The libraries now use the Digital Commons platform that is built for such efforts and are cultivating a culture on campus that would make storing openly created and available student work in perpetuity more of a reality. As the library continues to develop and build out student projects on the repository, considerations are being built in to encourage and accommodate the application of Creative Commons licensing making students work true examples of OER.

Red Rivers Professional Development

Educators often face growing demands to provide resources for students that generate measurable outcomes in the classroom at a reasonable cost, and information professionals are in a unique position to assist with locating caches of open or low-cost resources that can be used for K-12 education. This case study presents a professional development workshop that grew out of concern about changes to Tennessee's education standards for history and social studies. A workshop was created to teach librarians in a regional library system how to engage with educators in a way that would generate feedback that resulted in partnerships that would place primary sources into classrooms for K-12 students. Not all resources presented to the regional information professionals during the workshop fell under the definition of OER, but all resources and repositories were offered as tools for finding relevant education material that were meant to be shared in the classroom setting, lending back to Brent, Gibb, and Gruszczynska's notion of gray OER.

In Tennessee, the State Board of Education reevaluates its state standards every six years, and in 2016 key parts of Tennessee Civil Rights history were placed on the chopping block to be removed from the state standards of education.[32] The state differentiates

between standards and curriculum, stating that "[standards] are what students should know, understand, and be able to do by the end of the grade level or course; but the standards do not dictate how a teacher should teach them...the standards do not dictate curriculum."[33] Cultural erasure and censorship are a growing concern in the state for educators and librarians, and the removal of this content from state standards would impact what students are required to be taught, for example, about the fight for suffrage in Fayette and Haywood counties in the early 1960s. The University of Memphis is home to a large collection of primary sources and research files related to this group of sharecroppers displaced from their respective farms who joined together to live in a tent city while they fought for the right to vote and have representation in Tennessee.

The workshop was first a presentation at Tennessee's annual library conference. It was well received, and the presenting archivist was asked to turn it into a professional development workshop for a regional library system. Thus, the information professionals became students, and openly available repositories and other archival and educational sources were offered as ways to inspire collaboration with educators. The first part of the workshop focused on outreach and became the cornerstone of this process. A workflow was presented to the information professionals that offered tools and encouragement for partnering with educators. How to survey, language to engage with educators, and identifying stakeholders were topics presented as elements of a fluid workflow to create successful resource-sharing programs. Guides available through the State Board of Education and the Library of Congress were presented to encourage information professionals to better understand how educators can use primary sources in curriculum.

Repositories and other similar resources were shared in the second part of the workshop. The archivist encouraged the participants to dig deep within their own library collections to locate openly available primary and rare secondary sources, but they also advised them to be realistic about the information holdings they possessed. To further encourage the group, the archivist reviewed several different types of repositories based on size and scope. Possibilities shared included small, thematic archives such as the Ann Lewis Women's Suffrage collection and the A. Schwab digital archive, institutional repositories such as those available through the University of Memphis, and public library collections such as DIG Memphis.[34] The attendees were given tours of larger, state-level repositories such as those from Tennessee and other states like California. Each of the sources presented offered no-cost access to archival content. To ensure public domain resources were included, government resources such as NASA's archival images and the Library of Congress' tools for teaching with primary sources were also shared.[35] The archivist presented the Digital Public Library of America as a newer example of large publicly available discovery tools, as well as "thinking outside of the box" resources to highlight lesser-known repositories such as the Cold Spring Harbor Laboratory's Image Archive on the American Eugenics Movement.[36]

This case study is an example in which archives, gray OER, and primary source education tools provided vital examples of how primary sources can make their way into K-12 classrooms. The workshop encouraged information professionals to partner with educators using simple but effective methods to gain insights into educator needs and explored openly available educational tools to help educators successfully introduce archival material into instruction that meets Tennessee state standards. As the state

standards will undoubtedly undergo further review in the future, history is at stake. If topics such as civil rights history are targeted, there is a fear that they will be erased from textbooks and eventually curriculum.

University of Wisconsin-Stout: Collecting and Instructing Using Student Work at the UW-Stout Institutional Repository

As Wisconsin's polytechnic university, the University of Wisconsin-Stout exemplifies its applied learning and career-focused student research through the collections in its institutional repository. Institutional repositories provide students, faculty, and staff with the ability to widely disseminate their work as open educational resources that simultaneously promote and preserve their intellectual and creative output.[37]

The UW-Stout institutional repository engages students, faculty, and staff in an active and thriving open pedagogy cycle. At one end of the cycle, the repository routinely collects theses, dissertations, capstone projects, student organization publications, research posters, campus and grant funded data sets, and a variety of other creative works. In turn, the campus-created works in the repository provide a wealth of open educational resources that include unique local and institutional data, exemplification of professional skills, and deeply engaging representations of the campus community. Students who source their project research from the institutional repository enjoy affordable resources that replicate workplace data and represent local and institutional identities. They report increased satisfaction from the opportunity to use localized outputs from their own communities.

Archivists at the University of Wisconsin-Stout provide targeted instructional support for both ends of the open pedagogy cycle. First, they arrange outreach and educational sessions for courses that produce high-priority content. Frequently, the final products of these courses are capstone projects or other works that demonstrate the students' professional skillsets. The archivists arrange short, ten-to-twenty-minute visits to campus classrooms and laboratories. During these sessions, the visiting archivist demonstrates the capabilities of the institutional repository and promotes it as a free, long-term backup of students' work that they can link out to in posters, resumes, portfolios, and other substantiations of professional competency. The session concludes with a condensed intellectual property workshop. The archivist presents students with a primer on US copyright and Creative Commons licensing and provides them with the institution's Creative Commons selection flowchart.[38] At the session's end, students complete a worksheet indicating which Creative Commons license they would choose if they published and whether they want their projects to be included in the institutional repository. About 80 percent typically agree to submit their projects.

As the UW-Stout institutional repository has grown, the campus archivists have recognized a marvelous opportunity to integrate the repository into the curriculum. Since the institutional repository collects highly localized resources and data sets documenting the campus and surrounding communities, it replicates many resources that students will encounter in their future workplaces. UW-Stout archivists coordinated with faculty and instructors to create classroom projects that used institutional repository records for open educational practices (OEP). OEP classroom projects engage learners with openly available resources in contexts that stress creation, collaboration, and social interaction.[39]

In one example, the Career and Technical Education Program Director approached the UW-Stout Archives to request real-world survey examples from the institutional repository. The director noted a lack of student engagement with the survey examples in textbooks and hoped that authentic local data would resonate with the students in his graduate and distance education courses. The director reviewed approximately 40 surveys from the university archives' print collections and selected examples that demonstrated a range of sampling, narratives, and visualization methodologies. University archives staff scanned the selections, and the instructor facilitated analytical discussions about the surveys in five separate research methodologies courses. The instructor reported high student satisfaction, noting that students were able to form reflective opinions about their perceived shortcomings in the examples they observed. Student participants also said they felt more prepared for future workplace discussions about methodology and reporting, since they had seen a range of how others conducted surveys in practice.[40]

A second faculty partnership made direct use of submitted student work in the institutional repository to inform current student research. An assistant professor arranged for the students in a research capstone in environmental science course to attend an instructional session in the university archives. Each group project focused on highly local topics, including area beaver populations, vegetation composition along a local trout stream, and geospatial mapping capabilities. During their active learning exercise, the groups reviewed mentions of their topics in local media, an archival print collection relevant to their topic, and a selection of previous campus projects relating to their topic in the institutional repository. The students registered surprise and excitement when they discovered that campus predecessors had conducted similar work previously. In some cases, they were able to benefit from learning about their predecessors' research techniques. In others, they were able to identify data that they could build upon for their own projects. At the end of the semester, the capstone students in the class readily contributed their completed projects to the institutional repository, since they saw their immediate place in what the ACRL calls "Scholarship as Conversation."[41] An institutional repository is not a static space. It is a facilitated conversation among institutional peers that provides authentic examples of applied scholarship and creation and supports the development of workplace relevant research skills.

An institutional repository is not a static space. It is a facilitated conversation among institutional peers that provides authentic examples of applied scholarship and creation and supports the development of workplace relevant research skills.

Conclusion

Despite an absence of coverage in library science and archival literature addressing the intersection between teaching with primary sources and the Open Access Movement, it is apparent through research and practice that this work has been underway for some time and perhaps just not labeled as such. Each of the case studies discussed here fall

Table 1.

Presented case studies aligned with type of affordable course content exemplified

	OER (no-cost access, re-use, re-purpose, adaptation and redistribution by others)	Gray OER (free or low-cost, but lacking clearance for re-use, re-purpose, adaptation, and redistribution)	Open Pedagogy
FOLK-F141 Urban Legends		X	
ENG-R396 Queer Rhetoric and Public Issues		X	
First Year Writing, ENGL 1007-Seminar and Studio in Writing and Multimodal Composition	X	X	X
History 4851: History of Women in America		X	X
Red Rivers Professional Development		X	X
OEP Projects	X		

along a spectrum of definitions of affordable course content including open pedagogy, gray OER, and OER. Table 1 aligns each case study with the most applicable definition (in some cases many are appropriate).

Primary sources offer a transformative approach to education that enhances critical thinking, fosters engagement, promotes historical inquiry, and, when used thoughtfully, promotes social justice. Furthermore, by their nature, many primary sources are accessible freely in digital repositories across the world, offering instructors the opportunity to incorporate unique and diverse perspectives into their curricula, enriching student learning experiences. As outlined in this article, teaching faculty are already choosing to use primary sources to either replace or supplement their course readings to alleviate concerns about cost in addition to addressing textbook "shortcomings." Instruction archivists are also already using primary sources to design instruction sessions and class assignments based on resources that are freely accessible in their collections.

As an emphasis on affordable course content will likely continue as the cost of course materials continues to rise, this article aims to give instruction archivists and librarians

the language and inspiration to further conversations with their teaching faculty collaborators. The authors encourage readers to consider a spectrum of approaches to doing this work. Not all projects will be able to achieve the "reuse" part of the definition of open educational resources, but in many scenarios the requirements of an assignment may not require reuse. Instead, the authors encourage instruction archivists and librarians to also consider the definitions of open pedagogy and gray OER when designing projects. Because the ultimate goal is to further educational equity, these definitions capture much of the key intent behind traditional OER yet offer instructional designers more flexibility in their selection of course materials such as primary sources when the "reuse" portion of the definition is not applicable.

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