

TEACHING WITH PRIMARY SOURCES AT WASHINGTON & LEE UNIVERSITY

Humanizing History and Engaging with the Topics of Today

The reasons I use primary sources is because it allows them access to the humanity of the past. A lot of times, like you say the year 1000 and ... we have this mental disjunct between ourselves and what happened in the year 1000 ... especially if you're reading a textbook, you don't realize it's about humans. —Interview Participant

Paula S. Kiser | Digital Scholarship Librarian

Emily K. Cook | Research & Outreach Librarian



TABLE OF CONTENTS

Introduction	3
Defining Primary Sources: Meaning & Scope	3
Local Methodology	4
Participant Background	5
Academic Rank.....	5
Departmental Coverage	5
Why Teach with Primary Sources?.....	7
Findings.....	8
Learning & Sharing	9
Types of Physical & Digital Primary Sources.....	11
Finding, Organizing and Sharing Primary Sources	15
Pedagogy & Praxis	18
Local Resources: Special Collections & Museums at W&L.....	27
Conclusions	31
Summary of Findings	31
Advice from Participants	32
Suggested Actions for the University Library.....	33
Suggested Actions for Instructors	33
Closing Statements	33
Appendix A:	35

Primary Source Types 35

Appendix B: 37

 Sample Recruitment Invitation 37

 Sample Recruitment Follow-Up Email 37

Appendix C: 39

 Semi-Structured Interview Guide 39

INTRODUCTION

During Fall 2019, the Washington and Lee University Library conducted a series of semi-structured interviews to investigate the practices of Washington & Lee University (W&L) undergraduate instructors who teach with primary sources. All interviews were completed before the spread of COVID-19 became a concern across U.S. college campuses.

The project's scope included only interview participants from the humanities and social sciences. This local project is part of a suite of parallel studies housed at 25 institutions of higher education in the United States and United Kingdom, coordinated by [Ithaka S+R](#), a not-for-profit research and consulting service. In addition to providing the data for this paper, information gathered at W&L informs a larger capstone report by Ithaka S+R on teaching with primary sources in higher education.

Through this project, the University Library endeavored to collect data in order to:

- document existing practices concerning the curricular use of primary sources on W&L's campus;
- improve library support services relating to teaching and learning with primary sources;
- contribute meaningfully to on-going campus discussions on institutional history.

While all three objectives contribute to teaching and learning at W&L, supporting the critical study of institutional history meets an essential cross-campus need. Washington and Lee University publicly codified its commitment to the study of institutional history with the appointment of the [Commission on Institutional History](#) on August 31, 2017. The installation of the Director of Institutional History in 2019 concretely advanced this effort. W&L continues to critically engage with its past through projects like the library initiated, Special Collections based, and [Associated Colleges of the South](#) (ACS) funded: "[Pathway to Diversity: Uncovering Our Collections](#)"—a project that endeavored to create a shared digital archive documenting desegregation and integration at W&L. The findings from this interview project will empower the University Library to further engage in initiatives that support the preservation and study of institutional history, like the "Pathway to Diversity" project, while transcending library walls to provide instructors information they need to critically engage in the study of W&L's past.

DEFINING PRIMARY SOURCES: MEANING & SCOPE

Primary sources play a central role in this project. While the curricular deployment of "primary sources" crosses campus boundaries, use of the *term* "primary source" remains inconsistent and disciplinarily divided. To clarify the scope of sources of interest, this study defines primary sources as:

Historical or contemporary human artefacts which are direct witnesses to a period, event, person/group, or phenomenon, and which are typically used as evidence in humanities and some social science research. —Ithaka S+R

Although often fitting the above definition, practices inherent to *universal pedagogical methods*¹ fall outside of this project’s scope. Examples of universal pedagogical methods of primary source use include: assigning a novel in a literature class or watching a film in a film studies course, to name only a few.

The study set no exclusionary parameters for primary source formats used or time periods covered. No requirements existed for the use of Special Collections resources or campus museum objects.

LOCAL METHODOLOGY

W&L’s investigative team, composed of Digital Scholarship Librarian Paula S. Kiser and Research & Outreach Librarian Emily Cook, operationalized the project implementation guide developed by Ithaka S+R. Adhering to the methodology set forth by Ithaka S+R ensured the production and collection of consistent data across parallel studies.

In accordance with project requirements, the W&L team successfully completed the following steps. First, they developed a stakeholder engagement plan to identify interested constituencies and engender buy-in across campus. While continuing to engage in constituent consultations, team members submitted an Institutional Review Board (IRB) proposal. After receiving IRB exemption, team members invited, [via email](#), a voluntary response sample of instructors who teach with primary sources to participate in in-person interviews. During Fall 2020, the team completed 15 one-one-one interviews, utilizing a [semi-structured approach](#).

To render the audio recordings of interviews into editable text, the W&L team contracted a transcriber, bound by a non-disclosure agreement. After removing all personally-identifiable information, anonymized transcripts were submitted to Ithaka S+R.

Moving from the data collection and anonymization phase to data analysis, team members grouped recurrent themes identified in transcriptions into categories using principles of grounded theory coding. These groupings inform the areas of focus presented within this report’s “Findings.”

¹ The term “universal pedagogical methods” appears in Ithaka S+R’s *Supporting Teaching with Primary Sources: Implementation Guide*.

PARTICIPANT BACKGROUND

Study participants included instructors (non-tenure track, tenure-track, tenured, or staff instructors of record) whose classes engage undergraduate students with primary sources in any format, according to outlined [study definitions and scope](#). To identify potential participants, team members invited recommendations from campus administration, department heads and colleagues. The solicitation process produced a list of approximately 40 potential participants. The W&L investigative team invited 20 instructors to participate in in-person interviews. Those invitations resulted in 15 unique interviews.

ACADEMIC RANK

The final participant pool contained 3 tenure track faculty members, 8 tenured faculty members, and 4 non-tenure track instructors. Non-tenure track instructors encompass instructors, visiting assistant/associate/full professors and staff instructors of record.

PARTICIPANT POOL: ACADEMIC RANK	
Tenure Track Faculty (Pre-tenure)	3
Tenured Faculty	8
Non-Tenure Track Faculty (Visiting Assistant/Associate/Full Professor & Staff Instructor of Record)	4

DEPARTMENTAL COVERAGE

The 15 final interview participants come from a variety of disciplines in the humanities and social sciences—some representing interdisciplinary fields. The following table represents participants’ primary academic departmental or program affiliation. Not listed are secondary or tertiary academic affiliations or administrative/non-academic titles. All participants in departments within world languages appear together in provided data, as listing representation by department may unintentionally identify participants in small academic units.

PARTICIPANT POOL: DEPARTMENTAL COVERAGE	
Department/Program (or grouping)	Number of Interview Participants
World Languages	4
English	3
History	3
Art History	1
Digital Culture & Information	1
Religion	1
Sociology/Anthropology	1
Theater/Dance Film	1

As evident from the above chart, the majority of participants associate with humanistic departments. This imbalance stems from the study’s non-randomized, voluntary response sample. While acknowledged, the departmental spread does not hinder the study’s ability to provide a snapshot of curricular primary source incorporation at Washington and Lee University. Washington and Lee’s emphasis on interdisciplinarity, apparent in its programs and minors, frequently erodes the once insurmountable boundaries between the humanities and social sciences.

As gleaned from interviews, participants represent a broad range of teaching experience, from approximately 5 years to over 25 years of total experience teaching undergrads—inclusive of teaching outside W&L. Several participants fell between these broad poles, teaching undergraduates between 10-13 years. Many noted their experience teaching undergraduates began in graduate school. Diversity of experience continued to range of courses taught, across topics and levels. One participant noted:

I teach classes at all levels. 100 level courses ... are introductory surveys, 200 level are what we think of as the messy middle, so they tend to be either more specialized and kind of survey/seminars and 300 levels are advanced seminars for juniors and seniors, mostly majors.

In keeping with this variety, several participants relayed that they teach majors and non-majors alike.

WHY TEACH WITH PRIMARY SOURCES?

Continuing the trend of diversity of background and experience, interviewees reported a variety of motivations for teaching with primary sources. While this information was gleaned through interviews, a discussion of motivations grounds the later interpretation of this study's findings. Essentially, identifying *why* individuals teach with primary sources necessarily precedes a discussion of *how* they teach with primary sources.

Many interviewees felt strongly about the value of teaching with primary sources as they provide an avenue for teaching transferable skills. Several participants noted that the skills needed to engage with primary sources in academic settings are the skills students use to understand information outside of curricular environments, a skillset also known as information literacy.

The same kinds of critical thinking that you need to use with regard to historical primary sources is also the same kind of critical thinking that you should use with regard to kind of contemporary primary sources, right? Whether that is your friend's Facebook feed or the NY Times or, you know, the impeachment hearings that are currently happening. Right. The same kinds of questions, who, what, where, when, why, how. Who is this being directed to? Who is this... who is hearing this? — Participant 5

The development of critical thinking skills aligns with [The College's mission statement](#), which sets forth that the “The hallmarks of a graduate of the College include...The capacity to evaluate information critically and to convey it effectively” and the [University's mission statement](#), which states the institution strives to develop “students' capacity to think freely, critically, and humanely.”

In addition to a desire to teach transferable skills, foster information literacy, and encourage critical thinking, participants identified personal, departmental, or disciplinary catalysts for curricular primary source integration. These motivations ranged from a mundane need for practical classroom illustrations to loftier goals like humanizing the past. Specifically, interviewee motivations for curricular primary source use fit largely within the following categories:

- investigating institutional history;
- endeavoring to humanizing other cultures and the past;
- exciting students and increasing engagement;
- practicing experiential/hands-on learning;
- fostering global learning.

While the investigation of institutional history coincides with current [administrative priorities](#), two additional motivations align directly with the university's stated [mission](#). Specifically,

deploying primary sources to convey the humanity of cultures and past individuals—an attempt to engender empathy and forestall “othering” or scholarly detachment—further the university’s stated [mission](#) to develop “students’ capacity to think ... humanely.” One participant impactfully summarized this goal, and its larger importance, when discussing primary sources concerning enslaved individuals:

...one of our ideas is to be able to think about other cultures and other peoples and other times with more empathy. From the university standpoint, from a more humane way of thinking about the world...being able to learn about men, women, and children, who were held in bondage from these primary documents.... — Participant 7

Additionally, using primary sources to foster global learning aligns directly with the university’s stated [mission](#): “Graduates will be prepared for ... engaged citizenship in a global and diverse society.” One participant noted that primary sources allow students to learn how to be “curious about another culture” without “trying to impose their culture on another” and learn from the primary sources themselves.

The identified motivations do more than highlight the various reasons instructors teach with primary sources on W&L’s campus. They showcase *how* curricular primary source use furthers the university’s stated mission and initiatives—providing a persuasive answer the larger question, “*Why teach with primary sources?*”

The following findings provide a snapshot of how instructors are integrating primary sources across humanities and social science classrooms at W&L—offering inspiration for those interested in adopting this impactful pedagogical practice.

FINDINGS

Based on an analysis of interviews, the findings are organized into five major themes that explore how faculty:

- [learned to teach](#) with primary sources before entering the professorate and how they continue to disseminate knowledge on the subject;
- utilize a variety of [types and formats](#) across primary sources;
- [find, organize, and share](#) primary sources;
- employ primary sources to reach [pedagogical goals through innovative methods of classroom praxis](#), including the incorporation of [digital tools and methodologies](#);
- use [campus resources](#), specifically Special Collection & Archives and Museums at W&L.

The information presented within these themes sheds light on the need for educational and outreach opportunities broadly related to improving primary source literacy; exploring a scaffolded approach to teaching with primary sources; creating a personal approach to organizing

primary sources; and learning about locally available primary sources. The University Library, with the help of on-campus collaborators, has the expertise to meet these needs.

LEARNING & SHARING

The study endeavored to uncover how W&L faculty learned to teach with primary sources and how, or if, they share that knowledge via learning communities. As evident below, many participants received little or informal pedagogical training. Most learned to teach and with primary sources by adopting modeled behaviors. Interest in sharing acquired pedagogical knowledge varied among interviewees. Several participants relayed that disciplinary expectations prioritize the sharing of scholarly research, not pedagogical methodologies, through conferences and learning communities.

EDUCATION & TRAINING

A review of how faculty learned to teach undergraduates informs the discussion of instruction received in primary source pedagogy. A majority of participants who addressed general pedagogical training indicated they received no, informal, or ineffective instruction in how to teach. The below quotation represents one of many collected statements highlighting a perceived dearth of pedagogical training.

I had almost no training in pedagogy, really none. I was probably one of the last generations of people where it was just like throw you into the wild ... I learned it by doing it. —Participant 11

However, one interviewee noted the centrality of pedagogical instruction to their graduate education—notably, a graduate program on the *instruction* of disciplinary content, not solely on disciplinary content itself. This offers a snapshot of the varying degrees of graduate school pedagogy requirements spanning two decades. Due to the method of sampling, this data cannot speak to the experiences of the general instructor pool.

While not generalizable, noted trends extend to graduate training in curricular primary source use—particularly, informal instruction and modeling. When asked “How did you learn how to teach undergraduates with primary sources?” one history professor noted:

I never really did, mostly because a lot of the teaching I had witnessed was very secondary or textbook based. The primary sources I did see used in say, a 100-level classroom, they, as a discussion-section leader, those were the most fruitful conversations I had with students. That, in combination with my experience as a

graduate student, is sort of what shaped my use of primary sources in the undergraduate classroom. —Participant 14

In addition to modeling, some participants spoke of structured graduate school experiences in primary source pedagogy, such as: 1) serving as a teaching assistant for a first-year course centered upon special collections use and 2) attending a “pro-seminar” which delved in to typologies of disciplinarily common primary sources.

As with all learning, the most important education often occurs outside the classroom. In addition to graduate training and on-the-job experience, many interviewees learned how to teach with primary sources, or identify relevant primary sources, through one or more of the following: learning from colleagues, seeking out professional development workshops, and finding inspiration through the open web. The below quotation serves as one example of both intra and extra-institutional collaboration:

She [fellow academic] came to visit and I’ve talked to her and she and I trade assignments. A lot of it has been like just me trying to find cool things to do with them. Sometimes it’s been conversations with colleagues here or elsewhere that have given me ideas. —Participant 12

The ubiquitous academic conference also provided some participants with a venue to explore primary source pedagogies, however, three participants relayed that their respective disciplines prioritize the sharing of scholarly research, not pedagogical methodologies. Therefore, pedagogy discussions were less common at conferences their fields. One interviewee summarized the scarcity of pedagogical conference panels within their discipline:

There might be a couple panels at a conference. And they are not usually about technique. They’re usually about, for lack of a better term, theme, like increasing diversity and inclusion, or how do you create a more inclusive syllabus.... It’s never going to be “what did you do in the classroom as a technique for stronger pedagogy.” Never. —Participant 14

All three interviewees reporting this pedagogical vacuum associate with unique disciplines.

SHARING KNOWLEDGE

Just as many participants *gained* knowledge from peers and professional development opportunities, many displayed a commitment to *share* accrued knowledge in various formal and informal arenas, encompassing participation in conference presentations and panels, developing open educational resources (OERs), compiling traditional print publications, external networking, and intra-departmental resource sharing.

Levels of openness varied greatly between noted methods for sharing primary source pedagogical knowledge. For example, one participant noted, “*I self-published with a colleague, a textbook which was, so it was an instructional resource, and it’s like open on the internet. Anyone can get it. Anyone can modify it*” [Participant 13]. This level of openness appears in stark contrast to more closed methods of sharing like internal syllabus archiving within departments.

Providing additional nuance to this spectrum of pedagogical sharing, a minority of participants noted a *willingness* to share information, but had not yet. One participant relayed that publishing on pedagogy never moved beyond a discussion phase with a co-instructor. When asked about sharing primary source pedagogical materials, another interviewee stated: “I haven’t because I haven’t been asked to, but I would readily do so.” Again, these comments may speak to perceived professional benefits for publishing, formally or informally, on scholarly research—not on pedagogical methodologies.

OBSERVATIONS ON LEARNING & SHARING

The University Library stands in an ideal position to fill noted gaps in primary source pedagogical training. As the physical home of Special Collections & Archives, the online home of the W&L Digital Archive, and the future location of the Center for Academic Resources and Pedagogical Evidence (CARPE), the University Library can leverage existing resources and connections to provide support in teaching with primary sources. Furthermore, the library can offer venues for innovative W&L pedagogues to share their knowledge through sponsored workshops, archival handling sessions, and brown bag lunches.

TYPES OF PHYSICAL & DIGITAL PRIMARY SOURCES

For libraries to best support research and instruction with primary sources, they must first comprehend the breadth of resources utilized across disciplines. While many academic areas overlap in their reliance on certain types of primary sources, others depend on disciplinarily unique sources of information. Interviews suggest that the types of primary sources used within classrooms depend greatly on discipline, individual areas of research, and instructor familiarity with the ecosystem of available source.

TYPES OF PRIMARY SOURCES

Interviewees provided examples of primary sources used within the classroom. These sources fit into 5 broad categories: text, audio/visual, images, objects/material culture, and data.

TYPES OF PRIMARY SOURCE	
Source Type	Number of Participants
Text	12
Audio/Video	7
Images	6
Objects/Material Culture	4
Data	2

The most referenced primary source category, textual sources, proved internally diverse. Interviewees identified published and unpublished texts, across a variety of formats, spanning eras. Some items exist only in physical form, while others are born digital, and some materials serve as the admixture of the two: digital surrogates of physical items. A few interviewees noted published texts that appear in anthologies or preselected collections, adding a layer of mediation. Examples of identified textual sources range from the traditional, historic letters and contracts, to the modern, tweets and blogs.

Diversity persisted across categories. Identified audio/video resources include historical news reels and contemporary podcasts. Images ranged from photographs to floor plans. Participants utilized an array of material culture sources, objects that convey information about the people and culture that created them, such as ceramic sherds and extant architectural structures. While only two types of data arose in interviews, demographic data and textual corpora, this category holds the most potential for internal variety, as any type of primary source category can be utilized in the production of data. See [Appendix A: Primary Source Types](#) for a complete list of materials within each primary source category. Although clearly identifiable classes of primary sources exist, several interviewees crossed categorical boundaries to incorporate various forms of primary sources into classroom instruction. For example, one participant utilized written text, recorded live performances, and authorial interviews to reach pedagogical goals. Each of those primary sources provided students with a different angle with which to approach the subject. The instructor felt it was necessary for students to see how the written word changed when it was performed and how contextual information provided within an interview altered their perception of both the written and spoken words. The various types of primary sources brought different

experiences to the research process. A textual object is not replaced by an audio/visual one, but rather enhanced, and vice versa. All are necessary for their unique sensory attributes.

IMPORTANCE OF SOURCE PHYSICALITY

Interviewees who used objects and various non-digital materials as primary sources, did so passionately. They spoke of an object's physicality as an essential element of the source. Several interviewees believed an object's physical nature and three-dimensionality further impacted student experience, as opposed to the use of two-dimensional texts or images. While some participants embraced the circular use of photographs or images of books and objects as their primary sources, for others, the original physical object remained essential.

It's also important ... that when you're dealing with material culture that you get the physicality of it. Is it heavy, is it light, is it well made, is it poorly made, was it expensive, was it cheap? You know all the things like that also help inform your interpretation of it. —Participant 1

Several interviewees valued somatic experiences tied to physical items, experiences that cannot be reproduced digitally such as smell and touch. For one instructor, the materiality of books in Special Collections was integral to an understanding of the text, declaring it impossible to read a text without thinking about the book as an object.

For some classes and activities, physical and digitized items are not interchangeable—even when digital surrogates are readily available. When given the opportunity to allow students to physically interact with the object, some professors prefer that interaction over student use of the digital surrogate of the object. They worried about information being lost from the original items through digitization. Digitized collections of historic and unique materials are not as important to them as working with the original item. Instructor feedback makes it clear that libraries and Special Collections offer the physical interactions with materials that instructors find pedagogically important.

FILE FORMATS OF PRIMARY SOURCES

While some interviewees found physical items essential, for many, digital primary sources adequately met pedagogical needs. They were mostly concerned with the content of the source, rather than the format. It was irrelevant if the primary source was a PDF, a facsimile of the original item, or a modern printed copy. As long as students could read the source, the file format did not matter to them. For a very few instructors, the format was relevant if they specifically wanted their students to work with born-digital items. In rare cases, the file format served as the foundation of pedagogical goals.

While many participants referenced some form of digital primary source, the majority of interviewees refrained from identifying file formats, or didn't care about how they accessed different digital sources as long as they could access them. For example, when some participants searched online and found a website with sources written in the html of the webpage, such as Fordham University's *Medieval Sourcebook*, or they found a digitized copy of an original item, like 18th century pamphlets in the database *Eighteenth Century Collections Online*, both were considered digital sources without distinction. File format appeared relatively unimportant to participants, unless they created and edited sources themselves. It was more important for most interviewees to be able to find the resources than to find sources in a specific format.

For textual materials, some instructors who use digital surrogates of physical materials mentioned PDFs. Most simply referred to digitized texts. One participant mentioned creating Microsoft Word documents when transcribing hand-written sources. For visual items, one instructor who digitized their own materials mentioned JPEG, PNG, and TIFF formats: the first two for access and the latter for digital preservation. The majority of interviewees who spoke of visual images did not reference specific file formats. One participant expressed difficulty in sharing content with students, referencing the continued use of VHS tapes, as certain resources remain unavailable for use with modern technologies. Others mentioned the curricular use of YouTube videos, which can be removed from the platform at any time. Finally, when discussing datasets, one interviewee mentioned CSV files, a non-proprietary file format for data.

OBSERVATIONS ON PRIMARY SOURCE TYPOLOGY

At the time the W&L team interviewed instructors, the interviewees did not seem to care about the specific digital format of their sources. However, since these interviews took place, COVID has limited researchers' abilities to travel and access the original items, even within Special Collections in the University Library. There is already an increase in digitization requests to Special Collections because teaching faculty remain interested in bringing their students to Special Collections, albeit now in a virtual manner. The closest comparison to physically interacting with a unique historical source will be using high resolution images so students can see the physicality of the item. There are several digital viewers that attempt to replicate the experience of flipping pages of a book. That may be something that the Library could investigate. However, that would be an additional investment in development time on top of the time that Special Collections and Digital Scholarship staff will spend digitizing the items, creating their metadata, and uploading them into the University's Digital Archive.

To support long-term preservation, librarians must fully understand what primary source formats instructors use. For those who value using physical items, especially those housed in Special Collections, the library already follows best practices for the preservations of rare materials. Since some faculty have strongly held beliefs about the pedagogical value of students reading sources in print, the library should continue to purchase print collections of primary sources or published editions of primary sources in the fields researched by faculty and students. Regarding digital primary sources, file formats vary in digital preservation standards and, as with all technologies, eventually trend toward obsolescence—such as the previously mentioned VHS

tapes. Instructors unaware of source format, likely remain unaware of source sustainability. The University Library stands ready to fill this gap in knowledge. With professionals that specialize in sustainable digitization, the library is ready to share information with instructors about digital reformatting and preservation while collaboratively working across campus to ensure curricular materials persist for future students.

FINDING, ORGANIZING AND SHARING PRIMARY SOURCES

Just as the library endeavors to help faculty preserve currently used, technologically ephemeral sources for future students, it strives to support faculty in the identification of primary sources for in-class use. Finding primary sources for curricular use is an iterative process involving research, organization, long-term storage, and methods for facilitating student access. Understanding how instructors cycle through this process will help the library support ongoing practices, and provide guidance in streamlining existing habits.

APPROACHES TO FINDING PRIMARY SOURCES

Instructors shared many approaches to finding primary sources. These search strategies depended largely on 1) whether the curricular need necessitated physical access to an item or 2) whether instructors search for a known item, such as a specific edition of a work, or an unknown item that fits within a larger topic of interest.

Many interviewees returned to sources that previously met information needs when searching for primary sources, such as known academic websites, reference sources, materials available in the library, a reliable human (like a colleague or librarian), or curated catalogs and book reviews. Other participants preferred to search independently and used traditional research methods to find primary sources: searching online databases, the library catalog and mining the bibliographies of secondary and tertiary sources.

LOCATIONS FOR FINDING AND ACCESSING PRIMARY SOURCES

Knowing one's disciplinary information ecosystem, i.e., knowing where desired information lives, grounds any successful search strategy. Participants outlined both digital and physical locations for finding relevant primary sources. Some mentioned niche online collections of digitized material created by cultural institutions. Examples of these collections include databases of plays, images of material objects, bibliographies of sources that included transcriptions of the original items, and archives focusing on the collection of a single individual's papers. Researchers often knew of special collections and/or archives in their fields that digitized materials for open online collections. A few participants used the library catalog and subscription databases to find new sources. Others used open aggregators for cultural digital

collections such as the [Digital Public Library of America](#) and [Europeana](#) to search multiple digital collections simultaneously. For museum collections that were not included in these aggregators, they would go to those online catalogs. Interviewees expressed comfort searching the open web to find references to primary sources and hunt down the location of the items. Participants used the [Internet Archive](#) to find digitized books and look for references in older scholarship. For older content, some participants noted that digitized public domain content simplified their research process. Interviewees did not have any problems accessing materials in digital collections when they were able to find the necessary record. Finding an item record by searching the various catalogs was more challenging than access once they found the record, more so in the Special Collections catalog and the library catalog than in the larger online digital collections.

As not all primary sources exist digitally, participants identified known locations for finding physical items without digital surrogates. Through their research, many participants knew of specific archives, courthouses, historical society collections and special collections that require in-person visits. Some used secondary sources to find references to primary sources or used materials that they were already familiar with. For those interested in contemporary sources, participants discovered new sources to by traveling and investigating their surroundings or through exploration of relevant online ecosystems. One participant visited bookstores in foreign countries to identify current cultural interest and paid attention to what people were reading on trains.

PERSONAL ORGANIZATION OF SOURCES

After finding desired primary sources, instructors must organize materials for current and future classroom use. Participants recounted a spectrum of organizational practices, from no organization to more uniform methods of bookmarking and physical storage.

Interviewer: *So, do you keep a collection of digital or physical sources that you use for teaching?*

Participant: *No.*

Interviewer: *Okay.*

Participant: *Am I supposed to? —Participant 11*

Forgoing initial organization forces instructors to re-find items used in previous years, searching through old learning management systems (LMS) and emails, creating more work for their future selves, as mentioned by several interviewees.

For those that implemented forms of primary source organization, approaches depended on whether they saved a digital copy of the source or if they wanted to document the item's location. Most participants who stored digital copies often saved their files in the cloud, with one

person noting a preference for saving everything to a personal hard drive. When they wanted to be able to find the item again but did not save a copy of the source, some interviewees either wrote down the citation for the item or saved a list of links. One interviewee mentioned keeping a list of URLs on their website while another saved a list in a folder on their computer. One participant relayed that they suggest researchers use a platform like [Tropy](#), if they saved copies of items, to help keep them organized.

Interviewees also kept physical copies of items when print versions were purchased. Those who purchased physical copies stored them in their offices. This method was too expensive for some interviewees, however. Others relied on the library to purchase and organize physical copies of primary sources needed for research and classes.

CHALLENGES TO FINDING PRIMARY SOURCES

Interviewees identified several challenges to finding, organizing and storing primary sources. Interviewees felt that it was difficult to be aware of what they didn't already know and hard to find time to stay on top of new scholarship and new sources identified in their research areas. Some felt that looking for primary sources took too long, especially when they needed to not only find items but also edit them into a format usable for class through excerption, which proved time consuming. One instructor shared that they noticed students had difficulty engaging with older and longer primary sources, so extra mediation was necessary to prepare the source for integration into the reading list or activity. This added an extra layer of work on the instructor.

Several instructors felt that it was important to bring fresh primary sources into their classes to keep the sources relevant, especially when using contemporary primary sources. However, this was difficult when they struggled to find a specific source or type of source and kept hitting dead-ends. It is also challenging to work within the limitations of what items had been saved over time and what had survived throughout the years. Not all items had reliable provenances which was problematic.

Some interviewees mentioned the frustration they felt navigating within the interfaces designed by academic libraries. Determining the correct jargon within a database proved annoying. One participant noted that information appeared "siloed."

Being able to figure out what's out there when there are so many different silos, like one person's local collection versus this national scale and worrying that you're missing out on good stuff because it's just like not on your radar, I think that is a challenge I face. – Participant 3

Some participants mentioned finding Google easier to use than library databases, even though they knew the open web was not the most appropriate place to search. Others mentioned the frustration of items not being available digitally or having to use older technology. Having to

physically travel to see certain materials was a roadblock. For these instructors, digital access was essential for their research and classes.

OBSERVATIONS RELATED TO FINDING PRIMARY SOURCES

The library should provide outreach and educational opportunities for finding and accessing primary sources, two areas that interviewees identified as challenging. Variations in reported primary source organization speaks to the need for instructor training in digital file management. Librarians, with specializations in metadata, categorization, and organization, hold the requisite skillset needed to provide such support. Of note, thoughtful use of Box and Canvas's module functionality may ameliorate issues of longitudinal storage and access. Potential library collaborations with ITS and CARPE could disseminate information on existing storage solutions.

Librarians have been working for years on the problem of information silos but, despite much progress, have not completely resolved it. While the library's catalog allows researchers to search the print collection, the Special Collection's catalog, the Digital Archive, and a variety of subscription databases, it does not cover all of the library's available sources and its functionality can be mixed. The Special Collections catalog is only usable if its records are robust. Years of minimal archival processing have left many records without substantive content. Faculty often rely on reference interviews with Special Collections staff to find items relevant for their courses. More about this topic appears in the [Local Resources section](#). For disciplines for whom the DPLA, Europeana, HathiTrust, and the Internet Archive is relevant, these online collections worked to pull together resources from libraries and archives across the world. Providing educational opportunities to increase awareness of these aggregated sources would benefit faculty and students.

PEDAGOGY & PRAXIS

The curricular implementation of primary sources impacts course design and daily activity construction. Many participants shared experiences of adapting courses to integrate primary sources, both personally developed courses and those initially created by colleagues or predecessors. As curricular design remains a process rife with revision, several participants spoke of yearly course modification and some conveyed plans to develop new courses entrenched in the analysis of primary sources. Surprisingly, while all interviewees incorporated primary sources into one or more classes, a minority of participants explicitly defined "primary sources" through classroom instruction—due to a reliance on disciplinary jargon or a tacit assumption of student understanding. In the process of introducing and defining primary sources, some participants scaffolded learning outcomes within classes and across major courses. Interviewees also discussed their reasons for using or avoiding digital tools and methodologies.

The instructors that incorporated DH projects into their entire class relied heavily on primary sources.

COURSE DEVELOPMENT & CLASS PLANNING

Over half of the interviewees mentioned adapting courses or developing new classes. Within this group, many spoke of decreasing the number of assignments to focus on making each assignment more active on the part of the student, leaning heavily on incorporating primary sources. When instructors talked about developing new courses, they planned to incorporate personally novel sources—primary sources not previously used in other classes. Some interviewees identified gaps in what students were learning and wanted to give them the opportunity to learn new skills, from making short films, to doing original archival research abroad, to using digital tools with new corpora of sources.

Defining Primary Sources

While all study participants utilized primary sources in class, and most enthusiastically spoke of their pedagogical value, only approximately half of participants explicitly defined “primary sources” through instruction. This situation likely stems from:

- 1) variations in disciplinary jargon for “primary sources”;
- 2) assumptions about students’ pre-existing knowledge; or
- 3) a lack of need for definition in order to meet personal, course, or departmental learning objectives.

When asked, “Do you teach your students what a primary source is?” several participants came to realize that they did not explicitly use that term and teach students what primary sources are in their classes, or what biases and issues to consider related to available sources. Many often assumed students already held this knowledge.

I think it’s actually gone implicit. ... It’s gone implicitly by. I’ve talked about secondary sources. That is a term I use all the time but I don’t think I’ve consciously described primary sources to them or defined them. —Participant 12

A further issue that interviewees had rarely addressed directly with students was how forms of mediation problematize primary sources. Is a translation a primary source? An edited volume? An anthology? These questions add nuance to discussions of primary sources; but, pose potential problems for those seeking clear definitions or rigid typologies.

For participants who defined primary sources through in-class instruction, regardless of mediation, some varied their approach in relation to course level, “*I don’t do this by the time we get to the 300 level, but I do at 100 and 200 level...*” [Participant 5] or student rank:

I'm teaching first year through seniors and so I might work extra, spend a little bit more time making sure the first-year students know what they are doing but I think the rest of the students tend to be comfortable with that concept. — Participant 3

Several interviewees defined primary sources early in the semester, one participant even developed an innovative game to help students practice applying the definition through the categorization of primary and secondary sources. More activities and assignments appear below.

Course Scaffolding

Three interviewees spoke directly to scaffolding primary source use and skills across courses within humanities departments. These instructors taught both lower and upper level courses. These participants started with an introduction to primary sources in their lower level classes, teaching students what a primary source is and what information primary sources yield, before teaching students how to find primary sources independently. One interviewee explained this scaffolded approach in relation to the need for co-occurring skill development:

I'm more likely to do it at the 300 level than I am at the 1- or 200 level. Certainly at the 100 level, there is so much work to just getting them to figure out what a college paper looks like... —Participant 12

Graduated learning objectives recognize both students' evolving knowledge and abilities while lessening potential cognitive load.

Methods for Providing Primary Sources to Students

Most instructors make pedagogical decisions regarding student access to curricular primary sources. When students need to use primary sources in a course, participants noted they either provide students with sources (instructor pre-selection) or expect students to find sources independently (student research), depending on the learning objectives of the course and the goal of the assignment. When interviewees wanted students to use primary sources, but original research was not a part of the course, students accessed sources in a course pack or through a learning management system. Some interviewees mentioned using cloud storage options to share sources such as Google Drive and Box. For instructor pre-selected sources, several participants indicated they would link to necessary items or provide examples during class time using PowerPoint.

In some disciplines, providing the primary sources happened in lower level courses as primary source use was scaffolded. Participants in these disciplines reported that in lower levels, students learned how to interpret and use primary sources and in upper level course, they learned how to find primary sources relevant to their research question. When doing original research was part of the goal of the course, and the expectation for the discipline, students learned from either the instructor or from a librarian how to find primary sources.

ASSIGNMENT EXAMPLES

Instructors shared assignments that helped teach students how to use primary sources to create something new, how to use primary sources in new ways, and how to examine them using a variety of tools. The most traditional assignments included research papers, written reports of object analysis, transcriptions, primary source version comparison, and class presentations about chosen primary sources. Public facing scholarship included exhibits, posters, walking tours, social media posts, and writing for the University website. Assignments with digital tools included visual essays in film, using datasets with various digital tools, podcasts, timeline, primary source annotation with a group, and creating their own digital archive. Some instructors created activities in which students created primary sources, like calligraphy workshops or creating zines. One instructor shared a variety of games they had created to help students learn how primary sources are used to tell stories. Students created notecards for each primary source from sets identified by the instructor. They shuffled the cards, drew three, and had to tell a story with at least two. Another version of the game includes notecards with a variety of source types. Students need to decide which cards have primary sources and which are not. The only overlap in assignments existed among instructors who did traditional assignments. Faculty should be encouraged to share their creatively developed assignments that teach students to use primary sources so others may learn from and adapt their activities, improving the learning experience for students.

DIGITAL TOOLS AND METHODOLOGIES

Instructors have a great deal of flexibility and autonomy in creating assignments and activities to teach students how to use primary sources. The examples interviewees shared are wide ranging and highly varied, providing a snapshot into the myriad ways to incorporate primary sources into courses.

Digital Humanities

For a few of the interviewees, their analysis of primary sources was tied to digital methods so thoroughly that desired outcomes could not be replicated through pen and paper. These instructors incorporated digital humanities into their classes and used primary sources with digital tools so students could ask research questions that were not feasible with computer assistance. This is the separation between instructors who used digital tools and those who incorporated digital humanities. Support for the digital humanities at W&L started in 2012 then was nurtured by several grants including one from the Associated Colleges of the South and a Mellon grant. The interviewees that spoke about primary sources and DH incorporated it into the whole class and scaffolded assignments to build up to final DH projects. One instructor had their students annotating letters during the first part of the class so those annotations could be incorporated into a digital edition of the letters later. For another professor, students searched for

and collected primary sources throughout the term to create a born-digital archive as their final project. The DH project was not a separate project added into a course but rather it was the end of the entire journey with activities building up to it throughout the term.

Digital Tools/Methods

Eleven interviewees talked about digital tools and methods they had students use to evaluate and work with primary sources. Learning digital skills was an important reason for some instructors, such as creating a website or podcast, learning various editing software for audio/visual projects, and using social media for scholarship. Instructors had students doing text analysis with [Voyant](#) or native software within certain databases and social networking with [Gephi](#) and [Palladio](#). They created exhibits with [Omeka](#) and did 3-D photogrammetry with [Agisoft Metashape](#) (formerly known as Agisoft Photo Scan). Students created and/or cleaned up datasets and databases with Microsoft Excel, Microsoft Access, and [OpenRefine](#). Several instructors mentioned GIS software such as [ArcGIS](#). For collaborative writing, interviewees encouraged students to use Google Docs or [Perusall](#). Instructors described assigning students doing a close reading within a digital tool to crowdsource annotations while others had students do distanced reading with large corpora using data visualization tools to look at word frequency and co-locations of words.

Pedagogical Importance of Digital Tools/Methods

Instructors thought very carefully about adding digital tools and methods into their courses. For interviewees for whom DH was integral to their courses, digital tools and methods had essential pedagogical importance. They willingly spent the time in class to teach students and did not consider the digital element as a secondary addition to the course: “*They are so important that I dedicate a week of classes to the technology*” [Participant 2].

The ability of digital tools to help researchers find new ways of examining primary sources was exciting for some instructors.

It sort of seems a shame not to take advantage of technologies that allows us to integrate primary sources directly into this sort of product and directly into our pedagogies – Participant 5

Even for those instructors for whom digital tools were not central to their course, they still felt that the technology allowed them to do things with primary sources in the classroom that added value. For example, students were able to annotate and write directly on a primary source when they were using a digital surrogate with annotation software. Instructors appreciated being able to more seamlessly integrate images into their courses without having to break out a slide projector. Technology allowed students to work collaboratively on a digitized primary source in a way that was not physically possible if they were sitting shoulder to shoulder. In a COVID-19 world, means of using digital primary sources and working collaboratively will be essential to continuing the work of academic learning.

Challenges for Digital Tools/Methods

Several interviewees mentioned being skeptical of jumping on technology in the classroom bandwagons and the importance of adding new methods when they created value for the students. Even the use of slide decks was problematic for one instructor so they have moved towards more active and intimate instruction with primary sources.

It's funny in this age of technology and everybody sort of jumped on the bandwagon and I did too, and of course, I love PowerPoint and I love showing images. But after a while, I think peoples' eyes start to glaze over as they go into movie viewing mode in couch potato mode... Now I have the students look at an object, read a poem and then take the poem off the screen. Have them engage with things in a more immediate way, sort of going back to how we taught years ago. – Participant 13

As another instructor explained, it is important to consider why you are using certain technology and being honest about whether it is to help students or to jump on a bandwagon.

How are you really using it and how is it forwarding your teaching in a way that is useful rather than just displaying something and learning some new cool thing? Showing off essentially. – Participant 7

For those instructors who did want to add digital tools to their teaching, there were several barriers to doing so. One common challenge was the amount of time it took to learn the digital tool for both themselves and their students. Some instructors worried that they would not be able to learn how to use the tool that would fit with their needs or have the creativity they perceived as necessary to explore using DH methods. They feared that their age put them at a disadvantage and were worried that they would look silly trying to use new digital tools and trip up in front of students.

Different tools had different learning curves and it wasn't always straight forward when to schedule training. If the students learned too early in the term, they often forgot how to use the tool by the time they needed to start using it. With small class sizes, if students are allowed to choose their own tool, interviewees believed it would be challenging to support a wide range of tools that the instructors felt they would have to learn. Instructors also came up against student expectations for their own ability to use technology – while students are often called “digital natives,” they have more experience as digital consumers than they do as digital creators so it can still be time consuming and difficult for them to learn how to use a new piece of technology.

CHALLENGES TO TEACHING WITH PRIMARY SOURCES

While teaching with primary sources yields unique opportunities, as with most worthwhile endeavors, attendant challenges persist. Interviewees relayed a variety of hurdles to curricular

primary source use, from practical issues of lesson planning to ethical concerns over source representation.

An obvious challenge, sometimes desired primary sources elude instructors—either due to difficulty in procurement or simple nonexistence. One participant reflected on the impact of source unavailability on students:

You have to use what's there. And I think that can be very frustrating to students who like maybe have a particular topic that they are really sort of dead set on and not super willing to go out from that. —Participant 11

Although frustrating for instructor and student alike, primary source availability (or lack thereof) opens the door for broader discussions on the preservation and, sometimes biased, selection of historical records.

Further tied to source availability, some instructors commented on the lack of diversity in existing sources. When asked about finding appropriate sources for students to use, one participant observed:

I think sometimes getting sources from a variety of perspectives ... the question of who has the access to the ability to read, the question is who has access to the ability to write and get published and have their stuff recorded is something that, you know, particularly, when I am teaching classes on sort of like gender or race ... I have to talk to students a lot about what the primary sources can and cannot tell them and what they are and are not going to find. —Participant 11

One participant overcame this challenge by using material culture to discuss the experiences of historically under-represented groups. Other examples of attempts to augment source diversity include: the search for material written by LGBTQA+ authors, incorporation of indigenous writers into readings, and the identification of readings with diverse characters.

The most multifaceted challenge, issues of translation impact source availability, quality, and suitability for pedagogical goals. Needed materials may not exist in English. If available in English, they may not meet curricular needs—for example, material may appear in an antiquated style unfamiliar to modern students. Even if translations prove adequate, the act of translation serves as a form of mediation—adding an additional layer between the source creator and the reader. One faculty member noted this mediation in relation to an assigned class text:

The only challenge I say with, at least that particular unit, is that we do have to rely on translations. Well, you know, have to talk about what is reliable. Yes, we are going to trust [liberal arts college] to translate that correctly... so you can have that discussion about reliable sources and everything. —Participant 15

This interviewee transformed a challenge into an opportunity for instruction in critical information evaluation—refocusing the discussion on source reliability.

Moving from sources to the students who study them, many participants identified challenges related to student skillsets and preferences. For example, one participant noted that students lacked experience dealing with primary sources in the form of physical objects. Continuing the discussion of medium, another participant found that student preferences for easy-to access digital materials inhibited their ability to find valuable physical items within the library. Some participants identified cultural or discursive challenges for students in the interpretation of primary sources—for example, students expressed difficulty understanding older modes of argumentation or unfamiliar cultural references. If possible, pre-scheduling additional time for contextual instruction may overcome these discrepancies in background knowledge—although background instruction may prove ineffective in altering preferences.

Unfortunately, thirteen-week and four-week terms provide additional constraints when pre-scheduling time for primary source contextualization and curricular incorporation. One participant noted this constraint when selecting course materials:

There is an abundance of literature to draw upon so it was, if anything, after deciding how I wanted to structure the course, narrowing it down because despite my desire to be comprehensive, you just can't do that in [length of term]. — Participant 10

As noted later in the [Local Resources](#) section, time restrictions also impact instructors' ability to incorporate primary sources via visits to Special Collections or the campus museum.

Shifting from locally specific time constraints to a more ubiquitous concern within academia, three faculty identified cost as a challenge to teaching with primary sources—costs for departments and for students. One participant who purchased material culture artifacts for curricular use identified budget as a challenge. Two participants spoke of costs that fall to students through required readings. One interviewee noted:

... Costs. So, trying to find all of those translations that I think are the right translations without making the students buy 20 different books. And so, I spent a little while finding a reader that contains a lot of them and those that, in looking through the reader, I didn't find as satisfactory, I supplemented. —Participant 10

Information has value and publishers of works within copyright retain the right to set the price of their holdings. Because of this, cost and copyright remain inextricably linked.

Copyright served as the most nettlesome hurdle for several interviewees. One participant expressed frustration over waiting for copyright clearance of needed materials. Another noted how copyright of twentieth-century Special Collections materials impacted ease of student access:

The only thing I can think of is that when the students were working on [twentieth century manuscript], they had to do that on campus for copyright reasons, they couldn't access the materials off-campus. —Participant 12

Some participants identified copyright related barriers to the publication of products of primary source research—both for student and faculty projects. Examples include concerns over the open publication of digital humanities student projects and the print publication of a collection of primary source texts.

For several interviewees copyright challenges proved pervasive, impacting student access and faculty/student publication. Unfortunately, many copyright restrictions remain insurmountable unless materials age into the public domain, instructors request special use permission from copyright holders, or re-users feel confident in their claim to fair use.

While addressed separately, many of the identified challenges interrelate. For example, a desired source may be unavailable because no English translation exists or because illiteracy permeated the period under study. Or, material costs may trend high because required primary sources remain under copyright protection. The University Library's staff and faculty are ready to help faculty overcome these challenges, when possible, and find alternative solutions, when necessary.

OBSERVATION ON PEDAGOGY AND PRAXIS

There is a wide range of primary source literacy instruction and scaffolding across W&L academic departments. While primary source incorporation appears structured within certain departments, this is not true across all disciplines. However, instructors have a great deal of freedom to make changes within their courses. Instructors of lower level courses may want to consider incorporating additional primary source literacy instruction into those courses. The University Library and CARPE are in a strong position to organize and facilitate training in primary source literacy by partnering with departments that have successfully scaffolded primary source literacy into their curriculum. They should also consider workshops about how to teach undergraduates about issues with mediated primary sources. To optimize library support, instructors can collaborate with liaison librarians to ensure enhanced support for student assignments and the provision of required materials: books, primary sources, and databases.

Many of the challenges and fears regarding digital tools and methods could be directly addressed by having embedded technology support within classes that used digital tools. If instructors worked more closely with librarians or ITS classroom support staff, instructors would be able to share the responsibility of supporting digital tools in their courses. It would also be helpful for instructors using digital tools and designing assignments that relied heavily around those tools to continue to share their work with their colleagues. If instructors hesitant to use digital primary sources and digital tools saw an activity that translated over to their subject area, they should work with their liaison librarian and the librarians who support DH to use the necessary sources and technology support to bring that activity to their students. A hands-on workshop series would allow instructors to build out their ideas alongside expert support.

For those instructors who incorporated digital primary sources and digital tools into their curriculum, the COVID environment may force them to alter their method of course delivery, but for many W&L instructors, it has not necessitated the redesign of final projects or the types of sources that students use. Faculty who have relied on physical items are now sending requests to Special Collections to digitize materials for their classes. This pandemic-driven digital shift serves as an opportunity to introduce faculty to potential digital projects and the ways of exploring digital primary sources—much more than a consolation prize or a stop-gap measure.

LOCAL RESOURCES: SPECIAL COLLECTIONS & MUSEUMS AT W&L

Two locations on campus provide students with hands-on experience using physical primary sources: Special Collections and the Museums at W&L. The university’s history is held in the collections of these two departments. While most interviewees shared how they used the collections in their classes, a small handful of instructors were not sure that the university held any primary sources relevant to their courses. One interviewee mentioned using both Special Collections and the Museums at W&L in their course.

*These are gems of the university and we are very lucky to have them. –
Participant 8*

USE OF LOCAL RESOURCES IN CLASS	
Local Resource	Number of Participants
Special Collections (only)	7
No current use of local resources	4
Both Special Collections & Campus Museums	3
Campus Museums (only)	1

Special Collections & Archives came up frequently when interviewees were talking about using primary sources in their courses, even before the interviewers asked questions specifically about that department. Every person who had interacted with the Special Collections staff spoke positively about the staff who worked there. Interviewees loved how open the collection was and how eager the staff was to introduce students to the archival material. Participants who used Special Collections items felt there was value in students doing research with original documents and interacting physically with them.

The use of items in the curriculum often came down to whether the instructor felt that the materials fit into their course and added value to student learning. Education and outreach on the part of liaison librarians and the head of Special Collections helped one instructor realize what items the library held, something they greatly valued.

COLLECTIONS RELEVANT TO COURSEWORK

For classes in which Special Collections or Museums at W&L held relevant items, instructors were enthusiastic about bringing their students to visit these repositories. Part of their objective was to get students comfortable in archives and museums while the other objective was to do original research. Some of the assignments leaned heavily on using materials found in the collections while other class sessions were more of a show-and-tell with material. Some instructors felt that the Special Collections holdings were very rich in their areas. These interviewees appreciated the staff building the collection in their research area and informing them of new materials. Other instructors created assignments based on materials held by Museums at W&L in order to make their class experience richer. The areas mentioned by instructors fell into the broad categories of institutional history, literary studies, language studies, and history.

COLLECTIONS NOT IN CURRICULAR AREA

However, there were several areas where the instructors did not find that local resources held items that fit their course needs. Or, they were not aware of what the university held in either Special Collections or the Museums at W&L that could support their assignments. For some instructors, their own departments already owned the original items and Special Collections, or the Museums at W&L, were not collecting materials in those areas since other departments on campus already had them covered. One instructor said that Special Collections did not have any materials in their area. But, the interviewer knew that there was uncatalogued material that would provide rich information for the instructor and their students. Another believed that materials within Special Collections consisted mainly of items from and related to the American Civil War, which is not accurate.

FINDABILITY/ACCESSIBILITY

One challenge that came up frequently in regards to Special Collection was the difficulty in learning what was in the collection without assistance by staff members. While interviewees were impressed by how knowledgeable the staff is and appreciated working with the staff to discover relevant materials, they also felt hampered by having to go through the staff rather than

using an online catalog. Interviewees talked about staff contacting them when the staff discovered items that were not cataloged.

Because in fact, our Special Collections has been for some time now, been working on getting a sort of a hold of what they have. Because I'm occasionally getting an email from [Special Collections staff] like, 'check out this way cool picture we found in so-and-so's collection' because they weren't really curated, well they were curated in a more or less modern way, but they aren't cataloged and researchable in a way. We sort of go through the card catalog they have and give them a sense what it was like in the 1970s when they did research in a card catalog. – Participant 7

One person said it was easier to search online now than it had been in the past. But, most others didn't express any familiarity with using online search interfaces like [ArchiveSpace](#), a platform used by Special Collections to catalog their holdings, or the library's discovery system that ingests records from ArchiveSpace. Instructors are interested in being able to search Special Collections holdings but do not seem to know how to. No one mentioned searching for or finding materials in the Museums at W&L on their own, they worked directly with the staff to find relevant resources.

RESEARCH INSTRUCTION

Research instruction to teach students about using Special Collections or the Museums at W&L is very limited. Many interviewees described library sessions where Special Collections staff had already identified items as relevant to the course and pulled them out of the vault before students arrived. No participants had sessions about how to do original research or find items in an archive. The same holds true for working with items from the Museums at W&L. One instructor talked about telling their students how to do that work before they did independent research at other archives but not for W&L's archives. The focus seems to be on students using the materials, not learning how to find them.

Several interviewees left all instruction to the Special Collections staff during that session, not wanting to step on any toes, while one interviewee said they lead that class because they know how busy Special Collections staff are.

CHALLENGES TO USING LOCAL RESOURCES

Lack of awareness of Special Collections and the Museums at W&L holdings was mentioned by several interviewees as a barrier to using material held by the University. Interviewees shared that they felt other instructors had preconceived notions about the coverage of materials held in Special Collections and this hampered their ability to imagine how to integrate Special Collections

into the curriculum. Lack of student familiarity with using original manuscripts – either being too reticent to touch them or too cavalier and harsh – was another challenge identified by one interviewee. More than one interviewee felt it was difficult to find time to bring their students to either Special Collections or the Museums at W&L and to work in activities that used archival material. Either their syllabus was already very full or they had trouble finding a time that also worked with the other department's schedule. They also felt frustrated about giving short shrift to the skills needed to do research with original and unique items.

It is just hard. We don't have a lot of time. We're not working up incrementally to developing those skills so they get a little bit thrown in. – Participant 4

Another spin this time constraint was that some interviewees wanted to have more time to explore what Special Collections had to offer but did not feel that they could spare the time or had the freedom to look around in the closed stacks the way they wanted to. Another person was almost overwhelmed by the openness of Special Collections and had difficulty narrowing down what they wanted their class to use.

OBSERVATIONS RELATED TO LOCAL RESOURCES

Instructors who reached out to Special Collections were often able to find materials related to their classes. However, some interviewees held inaccurate assumptions about what resources were available to them. Even those instructors who brought their students to Special Collections did not all know that Special Collections would purchase materials relevant to the curriculum, if they knew about the need and the cost was within the budget. There is a great deal that can be done to educate instructors about Special Collections materials and the ability of Special Collections to purchase new materials as well as the Museums at W&L holdings. This work can be done as part of outreach and engagement through a collaboration with the Special Collections, the Museums at W&L staff, and liaison librarians.

For those classes that do visit and use materials in Special Collections and the Museums at W&L, there is room for growth for archival research instruction and developing instruction that moves beyond the show-and-tell model. Until students are doing independent research in Special Collections, they are not receiving instruction on how to find materials in an archive. Only one interviewee mentioned teaching their students how to do that and it was only in reference to independent study abroad research opportunities. Archival research is an iterative process of discovery that students should be taught. Through instruction in archival research methods, students can learn how archives are organized, how to find items based on limited finding aids and reading between the lines of folder lists, and how to find untapped resources.

CONCLUSIONS

SUMMARY OF FINDINGS

Fifteen interviews captured the variety and vigor of curricular primary source integration within W&L's humanities and social science units.

While pedagogical practices varied, instructional training proved surprising uniform. The preponderance of interviewees received little or informal pedagogical training in graduate school—something that extended to instruction in teaching with primary sources. Many proved eager to continue learning through peers and professional development opportunities while also displaying a commitment to share accrued knowledge in formal and informal arenas. This interest speaks to the potential for creation of a primary source focused learning community at W&L—something the University Library could facilitate.

Moving from pre-professorial preparation to contemporary practice, interviewees deployed a wide variety of primary sources across W&L classrooms—from “traditional” hand-written letters to born-digital blogs. For some, the materiality of physical primary sources stood paramount. For others, digital surrogates of physical sources met curricular needs. Although participants eagerly relayed the diversity of sources used, many eschewed detailed discussions of file type/formats for digital and analog materials. This trend highlights a potential disinterest, or a lack of knowledge. Unfortunately, instructors unaware of source format, likely remain unaware of source sustainability. With professionals who specialize in sustainable digitization, the library is ready to share information with instructors about digital reformatting and preservation while collaboratively working across campus to ensure curricular materials persist for future students.

When searching for primary sources, original and surrogate, digital and virtual, participants exercised various strategies: revisiting previously fruitful sources, Google searching, database research, bibliography mining, and consulting trusted individuals, to name a few. Sometimes instructors failed to find desired sources. An often-overlooked provision in liberal arts college libraries, librarians serve instructor research interests as well as student needs. Librarians can work with instructors, as curricular partners, to find these elusive sources.

When primary sources were found, instructors sometimes employed inconsistent of longitudinally unsupportable methods of storage and organization. The library stands ready to support immediate and long-term storage and organizational needs through guidance in best practices for “digital hygiene”—a set of practices that extend beyond password security to include personal file management and sustainable preservation. Irrespective of pedagogical methodology, instructors can leverage the University Library's existing services, staff, and resources to optimize curricular primary source use and overcome identified challenges. For example, to overcome challenges related to “unavailable” sources, instructors can consult with subject librarians to identify suitable material or to request the acquisition of needed materials.

To navigate hurdles inherent to copyright, instructors can consult the library's Digital Scholarship Librarian.

The Library also provides robust support for DH methods and integrating digital tools into the curriculum. Instructors can work directly with the Digital Humanities Librarian or get support from the entire Digital Humanities Action Team, which includes staff from ITS. The library provides access to, or assistance in, finding digital primary sources in the format appropriate for the designated methodology—diminishing instructor burden for part of the process.

Finally, while this study is part of a suite of parallel studies housed at 25 institutions of higher education in the United States and United Kingdom, some identified resources remain truly unique to our institution—those held within Special Collections & Archives and Museums at W&L. Many participants eagerly exploited Special Collections resources for curricular purpose and spoke highly of the expertise and commitment of its staff. Some noted difficulty in finding Special Collections materials without the aid of this highly knowledgeable staff. A union listing of Special Collections and museum resources would increase findability of available physical primary sources held by the university. A transparent and searchable index may correct existing mischaracterizations of local holdings, such as the spurious belief that Special Collections holding consisted mainly of materials from and related to the American Civil War.

ADVICE FROM PARTICIPANTS

Each interview concluded with a solicitation for advice to those new to teaching with primary sources. Interviewees offered advice on curricular design, time management, the utilization of local resources, welcoming outside expertise, and more. However, the most frequently mentioned piece was for instructors to **jump right in and start doing it**. They overwhelmingly felt that using primary sources made their courses better and provided students with a wonderful learning experience. They shared that **students will need help understanding what sources are available** for their research, students **need more time to conduct their own research** than one would initially build into the class schedule, and that it is important **to teach students the entire process of how to think about primary sources** and then where to go to find them. **Moments of uncertainty** about a student's research project can turn into learning opportunities for both the instructor and the student. They wanted to remind people that **there are experts on campus** that can support instructor teaching and you should **take advantage of their knowledge**. For people getting ready to add primary sources into their course, they should **curate the materials ahead of time** because it will take longer to find what you want than you would think. Instructors who already use primary sources should **highlight the primary text when they are using it** and draw attention to it to make the material seem more accessible to students. It is valuable to **let the sources speak for themselves**. And, of course, several interviewees strongly suggested that people should go down and **explore Special Collections**.

SUGGESTED ACTIONS FOR THE UNIVERSITY LIBRARY

The collection and analysis of interview data illuminated the need for the following library actions:

- create primary source pedagogy workshops, in collaboration with CARPE;
- produce of tailorable [primary source literacy](#) modules for deployment across disciplines;
- disseminate information concerning the breadth and variety of Special Collections' holdings;
- aggregate data on primary source holdings across campus, including Special Collections and Campus Museums;
- consistently preserve curricular projects rooted in campus collections;
- expand digitization efforts for moribund, or extinct, primary source formats;
- increase digitization efforts related to institutional history;
- Prioritize digital primary sources acquisitions that represent frequently marginalized or undocumented voices;
- Deploy targeting marketing of existing library services including topical support for research, digital humanities, digital preservation, digital hygiene and copyright.

SUGGESTED ACTIONS FOR INSTRUCTORS

- take advantage of provided library support services including topical support for research, digital humanities, digital preservation, digital hygiene and copyright;
- work with liaison librarians to ensure the acquisition of desired collections to meet curricular needs;
- participate in local learning communities to promote the sharing of primary source pedagogy and praxis;
- think broadly about applicable primary source typologies and formats;
- investigate successful methods for scaffolding primary source instruction within classes and across courses already implemented across campus;
- embed primary source literacy into course development and revision.

CLOSING STATEMENTS

One final action remains, the library must transcend professional jargon, like “information literacy” and even “primary sources,” to better communicate its resources and expertise across disciplinary boundaries and meet vital campus needs. Critically engaging students in primary source analysis is an endeavor too important to stall, encumbered by disciplinary mores. Using primary sources as a lens to study the past, the present, and to foster the skills necessary for

critical engagement in the future is integral to the university's mission of producing graduates that will be "*prepared for life-long learning, personal achievement, responsible leadership, service to others, and engaged citizenship in a global and diverse society.*" More so, the second recommendation of the 2018 Report of [The Commission on Institutional History and Community](#) reads:

Incorporate the university's history into its orientation program and its curriculum as a tool for examining society's challenges and better preparing graduates to face those challenges.

This recommendation can only be reached through broad availability of, and critical engagement with, primary sources that document that history—sources housed within Special Collections & Archives and partially available through the library's Digital Archive.

APPENDIX A:

PRIMARY SOURCE TYPES

SOURCE TYPE: TEXTUAL DOCUMENTS

Published	Unpublished
ancient texts	letters
children's novels	manuscripts
propaganda	archeological field notes
advertisements	meeting minutes
magazines	courthouse documents
zines and little magazines	contracts
newspapers	papyri
historic novels	scrolls
pamphlets	Tweets
plays	blogs
screen plays	
poetry	

SOURCE TYPE: AUDIO/VIDEO MATERIALS

- films and shorts
- recorded interviews
- performed poetry
- live performances
- music
- news reels
- podcasts in foreign languages

- broadcast advertisements
- oral histories

SOURCE TYPE: IMAGES

- works of art
- field drawings
- floor plans
- illustrations
- inscriptions
- photographs

SOURCE TYPE: OBJECTS/MATERIAL CULTURE

- ceramics
- ceramic sherds
- cultural artifacts – utensils
- archeological items -funnel remains
- physical spaces

SOURCE TYPE: DATA

- demographic data
- textual corpora

APPENDIX B:

SAMPLE RECRUITMENT INVITATION

Subject. W&L's study on teaching with primary sources

Dear [first name of instructor],

The University Library is conducting a study on the practices of humanities and social sciences instructors in order to improve support services for teaching undergraduates with primary sources. We are interviewing instructors whose undergraduate students engage with primary sources in any format, such as by conducting research, analyzing sources as evidence, or curating collections of sources. Would you be willing to participate in a one-hour interview to share your unique experiences and perspective?

Our local W&L study is part of a suite of parallel studies at 25 other institutions of higher education in the US and UK, coordinated by Ithaka S+R, a not-for-profit research and consulting service. The information gathered at W&L will also be included in a landmark capstone report by Ithaka S+R and will be essential for us to further understand how the support needs of instructors in teaching with primary sources are evolving more widely.

If you have any questions about the study, please don't hesitate to reach out. Thank you so much for your consideration.

Sincerely,

Paula S. Kiser, Assistant Professor & Digital Scholarship Librarian, and Emily Cook, Assistant Professor & Research and Outreach Librarian

SAMPLE RECRUITMENT FOLLOW-UP EMAIL

Dear [first name of instructor],

Thank you for expressing your interest in participating in this study. I would love to set up a time to interview you at your convenience. Please advise me of your availability in [time frame].

Also, during the interview, I would like to ask you to share a copy of a syllabus from a course in which you teach with primary sources that we can discuss in detail. We will use the syllabus as a prompt to discuss elements of course design. I will not share or reproduce the syllabus except for research purposes, and the confidentiality of your interview will be maintained. Sharing a syllabus is optional and you can still be interviewed if you decide not to share one with me.

Finally, before the interview begins I will ask you to provide verbal consent in order to ensure that you understand the study and are willing to participate in it. I am attaching the verbal consent protocol to this email in case you'd like to look over it now.

Sincerely,

Paula S. Kiser, Assistant Professor & Digital Scholarship Librarian, and Emily Cook, Assistant Professor & Research and Outreach Librarian

APPENDIX C:

SEMI-STRUCTURED INTERVIEW GUIDE

BACKGROUND

Briefly describe your experience teaching undergraduates. *Examples: how long you've been teaching, what you currently teach, what types of courses (introductory lectures, advanced seminars) you teach*

- How does your teaching relate to your current or past research?

TRAINING AND SHARING TEACHING MATERIALS

How did you learn how to teach undergraduates with primary sources?

- Did you receive support or instruction from anyone else in learning to teach with primary sources?
- Do you use any ideas, collections of sources, or other instructional resources that you received from others?
- Do you make your own ideas, collections of sources, or other instructional resources available to others? If so, how? If not, why not?

COURSE DESIGN

I'd like you to think of a specific course in which you teach with primary sources that we can discuss in greater detail.

- Do you have a syllabus you're willing to show me? I will not share or reproduce this except for research purposes.
- Tell me a bit about the course. Examples: pedagogical aims, why you developed it, how it has evolved over time
- Explain how you incorporate primary sources into this course. If appropriate, refer to the syllabus
- Why did you decide to incorporate primary sources into this course in this way?
- What challenges do you face in incorporating primary sources into this course?

- Do you incorporate primary sources into all your courses in a similar way? Why or why not?

In this course, does anyone else provide instruction for your students in working with primary sources? *Examples: co-instructor, archivist, embedded librarian, teaching assistant*

- How does their instruction relate to the rest of the course?
- How do you communicate with them about what they teach, how they teach it, and what the students learn?

FINDING PRIMARY SOURCES

Returning to think about your undergraduate teaching in general, how do you find the primary sources that you use in your courses? *Examples: Google, databases, own research, library staff*

- » What challenges do you face in finding appropriate sources to use?
- » Do you keep a collection of digital or physical sources that you use for teaching?

How do your students find and access primary sources?

- » Do you specify sources which students must use, or do you expect them to locate and select sources themselves?
- » If the former, how do you direct students to the correct sources? Do you face any challenges relating to students' abilities to access the sources?
- » If the latter, do you teach students how to find primary sources and/or select appropriate sources to work with? Do you face any challenges relating to students' abilities to find and/or select appropriate sources?

WORKING WITH PRIMARY SOURCES

How do the ways in which you teach with primary sources relate to goals for student learning in your discipline?

- » Do you teach your students what a primary source is? If so, how?
- » To what extent is it important to you that your students develop information literacy or civic engagement through working with primary sources?

In what formats do your students engage with primary sources? *Examples: print editions, digital images on a course management platform, documents in an archive, born-digital material, oral histories*

- » Do your students visit special collections, archives, or museums, either in class or outside of class? If so, do you or does someone else teach them how to conduct research in these settings?
- » Do your students use any digital tools to examine, interact with, or present the sources? *Examples: 3D images, zoom and hyperlink features, collaborative annotation platforms, websites, wikis*
- » To what extent are these formats and tools pedagogically important to you?
- » Do you encounter any challenges relating to the formats and tools with which your students engage with primary sources?

WRAPPING UP

What advice would you give to a colleague who is new to teaching with primary sources?

Looking toward the future, what challenges or opportunities will instructors encounter in teaching undergraduates with primary sources?

Is there anything else that you think is important for me to know?