

Developed by the ACRL RBMS¹-SAA² Joint Task Force on the Development of Guidelines for Primary Source Literacy

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

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

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- C. Draw on primary sources to generate and refine research questions.
- D. Understand that research is an iterative process and that as primary sources are found and analyzed the research question(s) may change.

2. Find and Access

- A. Identify the possible locations of primary sources.
- B. Use appropriate, efficient, and effective search strategies in order to locate primary sources. Be familiar with the most common ways primary sources are described, such as catalog records and archival finding aids.
- C. Distinguish between catalogs, databases, and other online resources that contain information sources, versus those that contain digital versions, originals, or copies of the sources themselves.
- D. Understand that historical records may never have existed, may not have survived, or may not be collected and/or publicly accessible. Existing records may have been shaped by the selectivity and mediation of individuals such as collectors, archivists, librarians, donors, and/or publishers, potentially limiting the sources available for research.
- E. Recognize and understand the policies and procedures that affect access to primary sources, and that these differ across repositories, databases, and collections.

3. Read, Understand, and Summarize

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

4. Interpret, Analyze, and Evaluate

- A. Assess the appropriateness of a primary source for meeting the goals of a specific research or creative project.
- B. Critically evaluate the perspective of the creator(s) of a primary source, including tone, subjectivity, and biases, and consider how these relate to the original purpose(s) and audience(s) of the source.
- C. Situate a primary source in context by applying knowledge about the time and culture in which it was created; the author or creator; its format, genre, publication history; or related materials in a collection.
- D. As part of the analysis of available resources, identify, interrogate, and consider the reas

and how they impact the research process.⁶

- E. Factor physical and material elements into the interpretation of primary sources including the relationship between container (binding, media, or overall physical attributes) and informational content, and the relationship of original sources to physical or digital copies of those sources.
- F. Demonstrate historical empathy, curiosity about the past, and appreciation for historical sources and historical actors.

5. Use and Incorporate

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

⁶ For more on the various types of silence that occur in the process of making history, see Michel-Rolph Trouillot, (Boston: Beacon Press, 1995) and Rodney G.S. Carter "Of Things Said and Unsaid: Power, Archival Silences, and Power in Silences." 61 (2006) 215-233 who calls these silences "the manifestation of the actions of the powerful."

Appendix 1: Glossary of Terms Used in These Guidelines

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

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A description of papers, records, or a manuscript collection that provides information about the materials, including arrangement and organization, historical or biographical background, a summary of the contents of a collection, and location of materials. These descriptions are used to locate relevant items within the collection. A finding aid is written through the process of arrangement and description,

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

The physical nature or format of a source. This is often distinguished from the content or the text of the source, although the best readings interrogate and elucidate both text and format.

than a For example, within the topic of the World War II homefront, a research question might be how the use of victory gardens affected the food supply in certain areas of the United States. The research question determines what information is needed, and may help the researcher define which sources are considered “primary” for a given project.

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

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

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

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

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

See

Appendix 2: Annotated Bibliography

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

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

Bahde, Anne, Heather Smedberg, and Mattie Taormina, eds.

. ABC-CLIO, 2014.

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

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

16, no. 1 (2016): 191-206.

This article provides context for the background and value of information literacy as it pertains
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skills. Although the results were inconclusive, this article addresses the need for better assessment tools and serves as a trailblazer in creating rubrics for primary source literacy that tie directly to pre-existing assessment tools provided by ACRL.

Mitchell, Eleanor, Peggy Seiden, and Suzy Taraba.

. Association of College & Research Libraries, 2012.

This volume gathers case studies describing effective primary source instructional activities, contributed by 47 U.S. based institutions. The focus is specifically on undergraduate students, and it highlights a wide variety of instructional models that provide important guides for teaching with primary sources, from one-shot sessions to longer programmatic interventions.

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

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

Mulrone, Lucy and Patrick Williams, "Doing It Yourself: Special Collections as a Springboard for Personal, Critical Approaches to Information." In T. Swanson and H. Jagman (Eds.)

(Publications in Librarianship #68), ACRL Press,

2015.

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

Prom, Christopher J. and Lisa Janicke Hinchliffe.

and final module summarizes numerous case studies about connecting students with primary sources. Secondary educators, faculty in higher education, and archivists were all interviewed to share their strategies and successful projects. The bibliographies of suggested reading lists and additional resources are also quite useful.

Samuelson, Todd, and Cait Coker. "Mind the gap: Integrating special collections teaching." *Journal of Special Collections*, 14, no. 1 (2014): 51-66.

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

Swain, Ellen D. "Best Practices for Teaching with Primary Sources," in Patrick Ragains and M. Sandra Wood. *Teaching with Primary Sources*. Rowman & Littlefield, 2015.

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

Theimer, Kate, ed.

Rowman & Littlefield, 2015.

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

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

This article is the second in a series of articles documenting efforts to establish archival literacy competencies for undergraduate history reW*(un)4(d)3(erg1 0 0W*ni/(,)9 0 1 108.02 199.85 T2 reW*n@MC /P

Appendix 4: Background on the Development of These Guidelines

The SAA-ACRL/RBMS Joint Task Force on Developing Guidelines for Primary Source Literacy was charged as an outgr