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# Supporting Teaching with Primary Sources at Brigham Young University: An Ithaka S+R Local Report

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# Supporting Teaching with Primary Sources at Brigham Young University: An Ithaka S+R Local Report

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# Executive Summary

## The Project and its Goals

“Supporting Teaching with Primary Sources at Brigham Young University: An Ithaka S+R Local Report” is a research study that examines the pedagogical practices of humanities and social science faculty teaching with primary sources at the undergraduate level. The goal of the study is to understand faculty members’ undergraduate teaching processes for the purpose of developing resources and services at Brigham Young University (BYU) to support the faculty in their work. The study is part of a larger research project carried out from 2019-2020 by the Harold B. Lee Library (HBLL) in cooperation with Ithaka S+R, a not-for-profit organization whose aim is to broaden access to higher education by reducing costs and improving student outcomes, and to advance research and teaching in sustainable ways. Twenty-five other universities from the United States and the United Kingdom also participated in the larger study.

## Findings

We identified four wide-ranging concepts from the interviews, culled from among the many points raised by the faculty:

- **Faculty strongly believe that other faculty should use primary sources.** They indicated that there were many benefits to be had from using primary sources with undergraduates and they had a number of ideas for inexperienced faculty to get started. Important ways that they pointed out to get started included leveraging the resources available in Special Collections (both the materials and the people) and engaging in conversation with other faculty who already have experience teaching with primary sources.
- **Faculty want additional, formal training on how to teach with primary sources in undergraduate courses.** Because of the great value that the respondents placed on the use of primary sources with their students, and because of their lack of formal training in this regard, they expressed interest in receiving training that would help them to get started and to overcome the challenges they face.
- **Faculty appreciated and used both physical and digital primary sources.** Although digital and physical primary sources are often presented by some as being antagonistic or mutually exclusive, the faculty interviewed enthusiastically used both formats. The factors that determined the format they used were the instructor’s chosen discipline, the goals of a particular assignment, how they planned to use the primary sources, the availability of the sources, their accessibility, and their ease of use.
- **Faculty identified many challenges associated with teaching with primary sources.** These can be divided into four broad categories: challenges that faculty face in helping students engage with primary sources including assignment design and carving out sufficient time to be successful, challenges that students face in developing the research

skills to successfully engage with primary sources, challenges when searching for primary sources, and challenges related to digitization. The library is able to help faculty identify these many challenges before incorporating primary source assignments into their classes and can help faculty take steps to mitigate them in their course planning. Partnerships between faculty and librarians will make the primary source experience better for both faculty and students. Although faculty identified many difficulties and challenges associated with using primary sources with undergraduates, they were strong advocates for their continued inclusion because of the many educational opportunities and benefits that derive from their use. Some of the principal benefits identified include increased critical thinking skills, greater engagement with the course content, and a chance to participate in actual scholarship, all of which contribute to BYU's *Inspiring Learning* initiative.

## Recommendations

In light of these key findings, we make the following recommendations:

*To improve the ability of faculty to teach with primary sources, we recommend:*

- **The Library, the Center for Teaching and Learning, and the Faculty Center should partner to create a module for new faculty discussing how to design and integrate primary sources into their courses.**
  - This module should include how to avoid or mitigate the challenges indicated by the faculty, whether related to their own deficiencies or those of the students.
- **The Library should host faculty brown bag discussions about teaching with primary sources. These discussions should feature Special Collections curators as well as faculty who are successfully teaching with primary sources.**
- **The Library should hold workshops to help faculty design assignments that leverage primary sources.**

*To foster better experiences for faculty and students searching for primary sources, we recommend:*

- **The Library should continue to improve discoverability of Special Collections materials, including enhancing search features in ScholarSearch and enhancing finding aids.**
  - Faculty who teach with primary sources should be contacted for feedback or focus groups about their specific search needs and their observations of students' search behavior.
- **The Library should build tutorials on searching for primary sources. These tutorials should include information on iterative search strategies. These tutorials could be used for asynchronous instruction or for in-class instruction.**

- **Brown bag discussions and faculty workshops should address such topics as scaffolding primary source discovery in assignment design and teaching students search strategies.**

*Librarians and curators should redouble outreach efforts to faculty to promote primary source instructional services and primary source literacy. We recommend the following:*

- **Library employees should promote their ability to save faculty time by bringing their students to the library for hands-on instruction and practice working with primary sources, whether physical or digital.**
- **The Library should work to create specific teaching modules and activities related to primary source discovery to use in instruction.**
- **The Library should work to create specific teaching modules and activities to assist students in evaluating and contextualizing digital primary sources.**
- **The Library should work closely with faculty to assess the effectiveness of these instructional modules.**

*Finally, in order to continue innovating undergraduate teaching and research on campus and to meet the rising demand for digitized materials, we recommend:*

- **The University commit to providing the staffing, storage space (both physical and electronic), and other resources necessary to preserve and make primary source collections available.**

The faculty at BYU sees great benefits from using primary sources with undergraduate students and are quite optimistic about the opportunities they afford. Likewise, the Library is well situated to support faculty by offering time-saving services related to primary source pedagogy, discovery, and library instruction, and it can help to promote this practice more widely across campus to other interested faculty and students. More importantly, the Library is firmly committed to supporting faculty teaching undergraduates with primary sources in whatever way it can, now and in the future.

## Research Note

The research that informs this report occurred prior to the outbreak of the COVID-19 pandemic in March 2020. The findings are based on this pre-pandemic data. The pandemic has increased the focus on digital resources and the availability of digital resources for students and teachers. This includes digital primary sources. While the pandemic has changed teaching approaches and strategies, we believe that the recommendations made in this report are still valid in this new environment.

## Introduction

Every year in late August the faculty and staff of Brigham Young University gather for a series of meetings to kick off the new school year. In 2016 President Kevin J. Worthen gave a landmark address entitled “Inspiring Learning.” He explained that “When I use the term ‘inspiring learning,’ I have in mind both meanings of the word inspiring. I hope we inspire our students to learn. And I hope that learning leads to inspiration. When both things happen, inspiring learning occurs, and we can then know we are on the right track to achieve the core goals set forth in our mission statement.” With this address, President Worthen launched an initiative that seeks to transform the educational experience of thousands of BYU students by providing them with life-changing, experiential learning opportunities.

In order to better understand how primary sources can be used to provide these types of experiential learning opportunities, the Harold B. Lee Library at Brigham Young University participated in Ithaka S+R’s “Supporting Teaching with Primary Sources” research study, along with twenty-five peer institutions in North America and the United Kingdom. For this project, local teams comprised of librarians at participating institutions conducted interviews that examined how teaching faculty utilize primary sources in their teaching. With the goal of developing recommendations that can be used to improve the support that libraries give to faculty teaching with primary sources, these teams collected qualitative data from faculty with the intent of both developing a local report and submitting the data to Ithaka S+R for analysis and publication in a final capstone report.

## Methods

This qualitative-needs assessment was part of a larger multi-institutional study coordinated by Ithaka S+R. The results in this report summarize data gathered at Brigham Young University where 17 participants were recruited through convenience sampling and interviewed between August and November of 2019. The semi-structured interview guide utilized as part of the project was developed by Ithaka S+R. Qualitative analyses were conducted using open coding and were based on the principles of grounded theory. Those interviewed were professorial faculty from the departments of History, Design, Comparative Arts & Letters, Religious Education, French & Italian, Asian & Near Eastern Languages, Political Science, English, and the David M. Kennedy Center for International Studies. Five participants were assistant professors, seven participants were associate professors, four participants were full professors, and one participant was an adjunct professor.

## Findings

### 1. Faculty strongly believe that other faculty should use primary sources

An important theme that emerged out of the interviews with faculty dealt with the process of learning to teach with primary sources. A significant majority felt that there are important pedagogical benefits derived from teaching with primary sources, particularly when it comes to teaching students transferrable critical thinking skills and providing them with experiential learning opportunities. Several respondents agreed that faculty, especially new faculty, could use help getting started. This appears to be in large part due to the haphazard way that the respondents learned to teach with primary sources themselves. None of the faculty received any formal training in how to teach with primary sources. They all learned through a process of trial and error.

The respondents identified a number of useful ways that faculty new to teaching with primary sources could get started. These included:

- Engage in as many conversations about teaching with primary sources as possible,
- Get started early because it is hard to integrate primary sources into an already developed curriculum,
- Bring primary sources into the classroom in simple ways,
- Create assignments using primary sources that focus on skill development,
- Model how to use primary sources for students, and
- Leverage the resources available in Special Collections, both materials and people.

Each of these concepts is examined more fully below.

#### ***Engage in as many conversations about teaching with primary sources as possible***

Respondents were nearly unanimous in their belief that successfully teaching with primary sources requires that faculty engage in conversations with colleagues and others who also teach with or specialize in the use of primary sources. These conversations were seen as places to share information, to gather important teaching tips, to get assignment ideas, and to discuss challenges. All of the participants advocated conversations with peers and other primary source specialists as a way to gather ideas for teaching with primary sources. It was not a question of whether primary sources should be used in teaching, but rather a question of when and how.

Conversations with colleagues on and off campus are an important place to begin when contemplating teaching with primary sources. One respondent recommended “consulting with people who have already done it. I’m a big believer in the pedagogy of theft. Teaching ideas are hardly ever completely original.” This instructor’s comments point to the importance of leveraging the expertise of others when beginning to teach with primary sources. Another instructor highlighted this same point by describing his interactions with a colleague who is a specialist in historical literacy. He mentioned that this person “provided some training classes to the faculty that are interested. And that’s been a real help to figure out how to use [primary sources] even more effectively.” Other faculty also highlighted the value of connecting with colleagues who are teaching with primary sources. One described his discussions with a colleague about teaching with primary sources and how he talked with her about how to create



assignments around the use of primary sources. He indicated that his discussions with his colleague informed both how he began teaching with primary sources and the approaches that he used to help students learn to use primary sources in their own research. These conversations were not just limited to colleagues at a faculty member's home institution. Multiple faculty members also referenced staying in touch with former classmates and friends from graduate school and sharing ideas with them. One professor teaching a large survey course remarked, "If I need a suggestion, I'll go to my colleagues who teach China or the ancient Near East, like, 'Hey, what can you tell me about which primary sources I'm going to use?' And then I've even had friends from grad school. We will email each other occasionally, and say... what did you use when you had to teach?" This contact was almost always by email or an occasional phone call. It is striking to note that social media was not used to communicate tips and tricks for teaching with primary sources.

One respondent made comments that are representative of the important role that Special Collections librarians play in helping faculty getting started with teaching with primary sources. This individual had attended a workshop offered by Special Collections that had informed his use of primary sources. He indicated that, prior to the workshop, he "didn't realize that [Special Collections] had holdings that I could use in my Renaissance and Medieval classes really until the workshop that [Special Collections] organized and that I got to attend." Another respondent highlighted the importance of connecting with Special Collections librarians in order to discover primary sources for use in her courses. She was confident that "Special Collections will find something for you. They'll find something for you to use." Another respondent described working with the curator of rare books to design an assignment and how "I've been taking students over ever since." One instructor strongly suggested that those interested in teaching with primary sources should "[t]ake a librarian to lunch." It did not matter to this particular instructor whether it was a subject librarian or Special Collections librarian. What mattered was the connection made with someone who worked in the Library and who could help the faculty member identify useful primary sources for their teaching. Another respondent agreed about the importance of connections and described reaching "out to librarians who are subject-matter experts" to help them find useful primary sources. Each of these respondents highlighted the importance of reaching out to other experts in teaching with or using primary sources and pointed to Special Collections librarians and subject librarians as useful partners.

### ***Get started early because it is hard to integrate primary sources into an already developed curricula***

While all of the faculty interviewed were teaching with primary sources, very few of them had integrated primary sources into their teaching from the beginning of their careers. This frequently caused challenges in how to best integrate primary sources into their courses with many describing having to decide if the downside of cutting content was outweighed by the benefit of using primary sources. One faculty member highlighted this conundrum in advocating that faculty new to teaching with primary sources look for ways that those sources can be integrated into their teaching during the initial planning of a course rather than trying to shoehorn primary sources into an existing class. He expressed the wish that he "would have been exposed to [teaching with primary sources] a little bit earlier because once you kind of have things developed then it's harder to implement them."

### ***Bring primary sources into the classroom in simple ways***

The message presented in the interviews is clear: Don't overcomplicate it! Over half of the faculty in the interview group indicated that those individuals wanting to teach with primary sources should look for simple ways to integrate them into their teaching. An instructor articulated this beautifully, saying, "I would encourage them just to bring sources into the classroom, even in super simple ways." Another described how he got started with teaching with primary sources, and his comments provide a helpful model for faculty new to teaching with primary sources. He said, "Start small and simple...my project was to transcribe the text."

Faculty also indicated that teaching with primary sources requires a willingness to try new things and that there is not a "one size fits all" approach to teaching with primary sources. One respondent put it best when he said, "Experiment! Try them! Dip your toe in the water and then take the plunge." Another individual argued that "primary sources for me...that's the way of the future for academia." Nearly all of the respondents agreed that it was worth the extra effort to integrate primary sources into their courses.

Starting simple eventually gives way to experimentation which leads to more complicated integrations of primary sources into instruction. It is in the transition from simple to complicated that Special Collections librarians and subject librarians can have the most impact.

### ***Create assignments using primary sources that focus on skill development***

The most effective way of getting students to interact with primary sources is to create assignments that require their use. The faculty interviewed felt that assignments featuring primary sources should focus on skill building. Several also argued that the inherent complexity of using primary sources requires that these assignments be scaffolded.

Respondents saw assignments that leveraged primary sources as an important way to introduce students to the research process and to get them excited about a particular subject. One instructor stated that "I find that it really enhances any assignment that I give to have [them] do research [and] students are much more likely to enjoy [it] if that research takes place in primary documents." Another respondent agreed that the most effective way to get students to use primary sources is to "give some kind of assignment." These assignments allow students to begin to develop skills that can be applied in other contexts.

This skill-building aspect of working with primary sources is crucially important to many of the respondents. One respondent stated that students need to learn to "triangulate those sources to see that every different source has a different perspective and a different potential bias." She further argued that the skill of triangulation is not just important for primary sources but that it can be used to better understand other kinds of sources. Another respondent agreed and stated that "I have them go through a lot of the steps of analyzing a primary source, a lot of things that students ought to do when they do research, but they don't usually do." Yet another pointed out that building transferrable skills is more important than content and that the development of these skills should be interspersed throughout the course. He said "So, you have to make a choice and say, is this a skill that's worthwhile enough to spend a class period on where they'll miss the lecture about X?" This same individual also argued that engaging with primary sources on a regular basis is more effective than doing so only once. Respondents agreed that active learning

and engagement are critical aspects of good teaching and that the use of primary sources encourages both.

Primary sources are complex, and it is not always simple to use them. For this reason, many of the faculty interviewed advocated the use of scaffolding. Scaffolding is an instructional technique in which activities and assignments build on previous learning. One of the respondents provided a nice description of how to do scaffolding and why it is important. He said, “To offset that challenge [i.e., the difficulty of using primary sources] I have broken the assignment down into very discreet elements...they hand in probably a total of six assignments to actually complete this assignment. And since each one is done discreetly and each assignment leads into the next assignment, it works pretty well.” Another instructor highlighted the value of scaffolding when teaching students how to analyze primary sources. He pointed out that there are “some useful strategies that help provide a scaffolding for students to interpret them. And so we talk about sourcing, about finding out when this source was written, who wrote it, why did they write it, who is the audience, what was the time period.” He further described how following these steps helps students better understand primary sources. Another approach to scaffolding that a faculty member used is to “set up research assignments that supplement the texts that we’re reading.” This allows students to see how the primary sources relate to the other parts of their coursework.

### ***Model how to use primary sources for students***

Respondents felt that a very effective way to help students understand how to use primary sources was to model the process for students. The easiest way to do this was to show a clear connection between a faculty member’s research and their teaching.

One faculty member described how enriching primary sources had been for her own research and how she “wanted to make sure that my students now get to see that early, even in really kind of simple ways.” Having students engage with primary sources allows them to feel and participate in the excitement of original research. Modeling also helps students increase their capacity to learn new techniques and skills. One professor underscored the importance of modeling the process of learning when engaging with primary sources. She identified “the key to real learning” as “stimulating a desire to want to learn” and discussed how talking about her research process helped her motivate students with their own research. Another faculty member identified the biggest challenge he faced as “helping students to realize or to find purpose and even joy in the exploratory process of Special Collections” and felt that it is really important to give students a “really hands on face-to-face kind of tutorial of how to do it.” He walked students through his own research process to accomplish this.

Another professor described how modeling the skills that he was teaching really helped students understand those skills. He stated that “if you can teach them to read and think like a historian, they’ll pause ... and they’ll start saying, okay, well, who wrote this, and what is it about, and things like that.” Another faculty member stated something similar saying, “I find that teaching them research techniques that are similar to the ones that I use in my own scholarship makes the literature come alive in ways that it doesn’t otherwise.” Both of these comments highlight the impact of modeling and how faculty are using their research to model for students what the research process looks like.

The importance of connecting research and teaching was really brought home by one comment. The faculty member simply said, “first try teaching them from what you already know.” Students learn best when they are shown firsthand how to use primary sources in their own research.

***Leverage the resources available in Special Collections including materials and people***

The faculty acknowledged that while it is important to have conversations with Special Collections librarians about teaching with primary sources, it is even more important to invite them to participate actively in the actual teaching and modeling of research leveraging primary sources. Special Collections librarians understand primary sources and how to use them. They also know what primary sources are available in their repositories and can model for faculty and students how to find those primary sources.

One instructor highlighted the importance of connecting with Special Collections librarians to understand what they have related to the courses they are teaching. These connections need to occur prior to the semester in which the course will be taught. He strongly suggested that neophytes to teaching with primary sources “look into what Special Collections has that pertains to their class and to not just assume, as I probably would have done, that there would be virtually nothing from” a particular subject area. Another faculty member recommended “collaborating with our allies at the library who are really eager to get students in there discovering the collections.” When these collaborations occur early, then faculty can arrange to bring their students to Special Collections.

Other faculty pointed out that Special Collections personnel are uniquely situated to help teach students how to use primary sources. One mentioned that they bring their students to Special Collections so that the Special Collections librarians can “train them with what’s available there.” Another faculty member stated, “I really believe that having archivists in the actual repository share what sources are available as samplings and how they can be used are very important.” Faculty who bring their students to Special Collections accomplish two very important things: 1) their students become familiar with Special Collections and how to use the materials held there and 2) their students make new connections with specialists who can help them with their research.

Multiple faculty members hinted at the emotional impact that materials in Special Collections can have on students and the value that interacting with physical materials has. One instructor described how physically coming to Special Collections “provides a great opportunity and being able to take them to something like a library where they can touch you know vellum, or they can look at manuscripts. It's a very different experience.” The ability to interact with these primary sources deepens students’ understanding of them and prepares students to better interact with surrogates of primary sources that are becoming more widely available in a digital world.

**2. Professors learn to teach with primary sources in a variety of informal ways and wish that they had access to better learning**

In helping to establish a baseline with all respondents, faculty were asked a variety of questions regarding what they teach and what their experience is with teaching with primary sources. As

they answered these questions, a consistent pattern appeared: all of the faculty members, independent of their discipline, had received very little formal training on how to teach with primary sources. On a positive note, many of the respondents had some form of experience using primary sources, which led them to see value in incorporating them into their own teaching, although several expressed an interest in receiving further training. They were also asked how they learn about resources and if they share their own resources with other faculty.

### ***Formal and Informal Training***

At the beginning of each interview, the respondent was asked what kind of training, if any, they had received in how to teach with primary sources. Fifteen respondents stated that they had received no formal training at any point during their education or throughout their teaching career. For the two respondents who stated that they had received formal training, one's response was vague while the other provided an interesting example of formal training. The vague answer was: "Well, I mean, I've sat in on a number of courses over the years." Unfortunately, the nature of these courses was not clarified. The other instructor who provided a more helpful response stated, "We also have some people in our department...who specialize in historical literacy, who [have] provided some training classes to the faculty that are interested. And that's been a real help to figure out how to use them even more effectively." Despite the willingness of these instructors to provide training, it is sobering to think that there was only one mention of such training on campus among the seventeen respondents.

It was more common for respondents to state that, if they felt that they had received any training at all, it was in the form of informal training. The most common type of informal training was experience based and occurred during their years as either an undergraduate or graduate student. Other informal training included discussions in department study groups, hallway conversations with colleagues, adapting colleague's assignments to fit their own needs, participating in a library thought-group (which could be argued was formal training), and learning by doing (e.g., their own research agendas have made them learn how to use primary sources or simply incorporating them into their teaching in a trial-and-error effort).

### ***Experience with Primary Sources***

So many of our respondents felt that they had never received any formal training on how to teach with primary sources, yet 12 out of 17 indicated in the interviews that they had had some kind of experience with primary sources before they began incorporating them into their teaching. Looking more closely at their experiences, the vast majority said they were exposed to them during their college years. Four of them saw primary sources used by their professors in their classrooms or incorporated into an assignment during their undergraduate schooling, while thirteen had similar experiences during their graduate schooling. This indicates the importance of this study as it aims to determine why and how faculty use primary sources in their teaching at BYU. If it is the first time that students are learning how to use primary sources, it is vital that the Library understands how faculty are using them to teach. It also indicates that providing formal training for BYU faculty should be a top priority to ensure that students, both undergraduate and graduate, are receiving the best learning experiences with primary sources.

### *Finding and Sharing Resources*

Several of the interview questions focused on the resources that faculty used to teach their classes. First, we wanted to know where they found resources. There was a wide variety of answers to this question, yet the most common answer was that faculty obtained resources from their colleagues. Most just held informal conversations with their colleagues and shared what they were doing in their classes, while several others used syllabi from their colleagues and adjusted them to fit their own classes. One instructor's response to this question brings up a very interesting topic that would provide fascinating insights if explored further in a separate study. When asked if their department prepared resource packets for new faculty, they replied, "There's not any formalized method in which the department does that for new faculty. There is some sharing that goes on if you make friends and ask for things, but when you're a newer faculty...you don't always want to be asking...questions or getting things because then people might say, 'Well, they don't know what they're doing.'" This statement indicates that there is a fine line for new faculty to walk between asking for guidance and appearing to be begging for help. How pervasive is this thought with new faculty? Does it really prohibit newer faculty from seeking guidance from more senior faculty that really should be functioning as mentors to these newer faculty? Or do most end up developing strong enough relationships with a few colleagues that they overcome this fear? It is a positive indication that this was the most common way faculty found resources, so perhaps it is not as big of an issue as it first appears by this respondent's answer.

The second most common answer to the question of where faculty get resources was from the library. One respondent stated that they rely heavily on their subject liaison while several others indicated that they work closely with librarians in Special Collections to find appropriate resources for their classes. From the Library's perspective, performing outreach across campus can be challenging as many faculty members feel comfortable with the way they have taught their classes over the years and see no need to introduce primary sources in their teaching. Knowing that there are faculty seeking appropriate primary sources for their teaching confirms the need for librarians to continue performing outreach.

Additional responses from faculty regarding where they find resources bear repeating here. Several faculty members talked about how they use resources they obtained while in graduate school. It is highly likely that this pattern will be repeated as BYU students taking courses that incorporate primary sources will graduate and some may take their lists of resources with them as they start graduate programs and eventually become faculty. One instructor discussed how they inherited the course from a previous instructor and continued using much of their materials since they felt it was effective. Another talked about attending professional conferences and intentionally attending sessions that talked about how to incorporate primary sources into instruction.

Another question that was asked to respondents included whether they shared their resources with others. Thirteen respondents answered in the affirmative. Of the thirteen, however, nine said that they only share when they are asked by a colleague. The remaining four were willing to share more actively, such as by presenting at professional conferences or taking new faculty under their wings if they teach similar classes.

### ***Faculty want training***

As mentioned above, fifteen of the respondents indicated that they had no formal training on incorporating primary sources into their teaching. Although it was expected that many of them would not have this training, it was surprising to see such a large number. Even so, several spontaneous comments from the faculty indicated a desire for more training, with several even suggesting ways that this could be done, from having a class for faculty to department retreats and brown bags. One instructor even expressed a desire to attend Rare Book School. Another made a suggestion that included an astute observation: “I think it would be beneficial in our department if there was more formal discussion of this sort of thing, but in a place like BYU where we're rewarded primarily for our research..., the benefits of doing that are less.” Even with fewer benefits, there are obviously faculty who feel teaching with primary sources is important and find ways to do so.

### **3. Faculty preference of primary source formats: digital and physical**

For the purposes of this report, “digitization” and “digital” here refer predominantly to the creation of new digital artifacts from an existing physical object, whether that is a painting, a manuscript, a printed book, or something else. It can also mean more broadly the electronic, virtual environment on which digitized items are viewed, and the technologies used to discover, view, share, or otherwise interact with them. On the other side, “physical primary sources” refer to rare or fragile materials held in archives and other repositories, as well as other formats such as microfilm, microfiche, and modern published items such as critical editions and primary source anthologies.

#### ***Physical or Digital? Factors influencing format preference***

Faculty more often than not did not view physical and digital primary sources as mutually exclusive or antagonistic. They never talked about digital and physical formats in terms of an “either-or” decision, and with certain exceptions, a majority of the respondents were agnostic or ecumenical regarding which format they preferred. The respondents tended to base their decision regarding format on their discipline, the goals of a particular assignment, how they planned to use the primary sources, the availability of the sources, their accessibility, and their ease of use.

Discipline is an important factor in format preference. Some place a premium on digital primary sources due to the nature of research in their field. Faculty in both International Development and Political Science indicated that digital materials are more useful because the focus on coding and data analysis prevalent in those fields requires electronic documents. For Art Historians, on the other hand, physical primary sources are key because of the difference between the quality and context of physical primary sources (specifically images) and their digital surrogates. Ancient Studies is a unique case due to the scarcity and fragility of primary sources extant from the period, making handling the actual items impossible. In such cases modern printed facsimiles or critical editions can take the place of the actual items, as can digitized surrogates.

The nature of the assignment is another important factor in determining which format the instructor uses. For example, one instructor who had previously required their students to go to Special Collections to view certain texts, stated the following: “If you are looking at the text itself and that's your most important, I mean...the words itself, then there's no reason for me to

look at the words down in that special room rather than the words here in my office or the words on a computer at home.” In that same interview, the respondent indicated when it would be important to go to a special collections repository and use the physical items located there: “If I’m doing something specifically on book history then I feel like having the artifact...in hand...serves a kind of pedagogical purpose...because you can’t look on Hathi Trust and see a binding or...all of the kind of book history material things.” This sentiment was repeated by several faculty in various disciplines, especially when the nature of the project required hands-on interaction with physical artifacts. Yet this is not a universal sentiment and, again, is dependent on the goals and learning outcomes established by the professor for the assignment.

However important the above factors might be in determining the format of primary sources preferred for a given project, in the end, the deciding, limiting factor is usually availability.

### ***Challenges related to Digitization***

This category represents one of the most common elements that respondents mentioned, one which they nearly always discussed in conjunction with or in contraposition to physical primary sources. Physical materials always exist as counterparts and colleagues of digital ones, and the two are so intimately connected that it is impossible to speak of one without speaking of the other. For this reason, the discussion that follows will include not only digital challenges per se, but also the relative advantages and disadvantages of both physical and digital formats and their respective repositories.

Digital technologies and the digitization of materials that had previously been accessible only through an in-person visit to a specialized repository have greatly enriched primary source research. Throughout the interviews, faculty applauded the many opportunities afforded to faculty and students alike from these technologies, yet they also pointed out the limitations and unintended side-effects of digitization on the research process generally and primary source research specifically. Their experiences dealing with the challenges of digital technology and digitized primary sources can benefit future faculty by making them aware of areas of concern and allowing them to formulate strategies to address those issues ahead of time.

The first issue has to do with the faculty and their own engagement with digital technologies and platforms. While many regularly utilized them, others demonstrated a reluctance or lack of awareness, both regarding the sources themselves as well as the platforms on which they appear. For example, one professor indicated that “No, I’m not that fancy at all. Google Docs, right? The students will work together on Google Docs, that’s it. That’s as far as I go.” Another said, “There’s probably more available than I think, but I haven’t really been exposed to them or looked for them actively.” There are many reasons for this, among them time. As the issue of time touches on engagement with digital technologies, one instructor indicated, “That’s...a challenge because...I’d have to learn all the platform tools...before I could teach the students how to do it or to make sure it was working properly.” As time is a scarce and precious commodity for faculty, taking the time out of their busy schedule to learn new digital platforms is a significant challenge.

The next challenge concerns the students’ abilities with digital technologies. Although it seems counterintuitive, many students are unfamiliar with the technologies and digital processes



involved in research. “Citing digital images,” for example, “is very hard for them,” said one faculty member. Similarly, searching primary source databases, manipulating digital images, uploading items to Learning Suite, or even familiarity with basic programs for scholarly work can present difficulties for the students. In this regard, the same instructor said, “They don't spend as much time on the computer as I do. So even just using... Word or PowerPoint...they're not as good at it.” These tendencies are not universal in students, but faculty should take them into account when planning a primary source assignment that involves digital images and tools.

On the other side of the previous issue are the areas where students are very savvy and comfortable with technology. Specifically, because of their previous experience with digital technologies—YouTube, Instagram, Google, smart phones, tablets, etc.—they expect primary source research to follow those same patterns of ease and convenience and therefore do not take the time or make the effort to go deeper.

Other challenges associated with digitized sources include the general technical difficulties inherent in digital technology. Whether the specific issue is outdated software, an old computer, the cost of acquiring new equipment, or less-than-ideal search engines, they all contribute to a lessened experience for the students when attempting to bring in digitized primary sources. Similarly, online content is notoriously impermanent. One respondent shared an experience about this during a digital semester project: “We coded all these documents and then we went back to find them, and our links went down. We took a couple weeks and, you know, on steroids, were trying to download and save as many of these as possible.” Another instructor shared a similar story regarding the creation of a digital primary source repository being carried out by the students: “We do use outside links upon occasion, but actually we limit them because I've found that they go dead so quickly that they're just not useful over time. They're useful for...the semester we're doing the project. But a couple years down the line, half the links that students would put in there are dead.” Unfortunately, this occurrence is all too common and requires planning on the part of the instructor to deal with such contingencies.

The final challenges associated with using digitized primary sources in undergraduate courses have to do with the changes in those sources as a result of their conversion to digital objects and the resulting impact on student learning. One faculty member expressed the concept in this way, “What does the object tell us that the facsimile doesn't?”, while a colleague pointed out students tend to forget about certain features in primary source documents “because it's on a computer screen.” Among these features are the size of the item (“hugely important information” in the words of one instructor), the weight and fragility of old paper, or the way that the different physical elements of a primary source operate and work together in a non-digital setting.

On a deeper level, however, faculty reflected on the overall impact of digital materials on university learning outcomes and the goals of an undergraduate education. “We gain a lot...in terms of quantity of data, but I do worry about [the] kind of intellectual breadth and what we lose by doing that... I worry that's just going to get worse,” stated one instructor, adding that “some habits of mind and work [are lost]...that are part of what we're trying to give them here at the university... You need to teach them you can't learn everything from sitting in a chair in front of the computer.” This was seconded by another faculty member, who said, “The speed with which we can access oodles of data means that we don't take the care to actually piece through it and

patiently study it and there's something that we lose in that process"; and "The students will be able to chop up these digital copies and...kind of grind them into a form that they're more comfortable with rather than engaging with them on the text's own terms"; and finally, "Not only does the digital world... complicate our personal relationships or interpersonal relationships, it also limits our relationship with knowledge and how we experience knowledge."

Faculty value not just the end result of student research, but also the process that students go through to create those scholarly products, as well as the critical thinking and research skills that they are expected to acquire throughout their university education. Furthermore, they demonstrate that without proper guidance and training, digitized primary sources have the potential for diminishing the research experience for undergraduates.

In the end, the respondents did not indicate any kind of antipathy towards digitized primary sources, yet they did highlight how seeing and handling physical ones helps students to understand the digital surrogates better: "Even as great as [digital] is, it's also not quite the same way that any other readers before you have experienced that text. And so I think there's value in both, and having experience with both helps inform how you read the other [i.e., the digital primary source] even in the absence of the other one [i.e., the physical primary source]." So, while all respondents welcomed and utilized digitized primary sources with their undergraduate students, they also recognized that "it's not...the only answer."

In spite of the many challenges that faculty identified above, they were unequivocally enthusiastic about the many benefits and opportunities that stem from having their students work with primary sources, both physical and digital.

### ***Opportunities and Benefits of Physical Primary Sources***

When faculty spoke about the benefits of physical primary sources, they did so most often in reference to items held in Special Collections. It is for this reason that faculty indicated that one benefit from having the students interact with physical sources was the opportunity to gain archival experience. Speaking of a large, multi-semester project, one faculty member said, "That [assignment is] an ongoing one where students are actually doing the archival work of developing guides that are theme or topic specific rather than just having students go explore collections." The process of creating finding aids obligates the students to move beyond a passive exploration of the sources to an in-depth, topical assessment requiring significant time spent in the archive getting to know the collections and what it is like to do research in an archive. At a more fundamental level, however, is the awareness raised in students of the archives themselves. As another faculty member expressed it, "The biggest benefit to that was students walking out of that realizing...I'm allowed here, I can come back and do work." This realization is not just for one class or one assignment, but for a student's academic career.

The benefit of archival experience extends beyond a student's time at BYU and strictly academic pursuits. First is the realization that digitization cannot happen without an original physical item. Second is the grounding effect that physical items have on students in an increasingly virtual world. One instructor expressed the idea in this way: "Some people say we're moving into this world of total virtuality...where everything will be digitized and therefore the physical collection is obsolete. I see it just the opposite way. I think that as people live more and more in a virtual world, the call of the thing becomes more urgent." This goes beyond the curiosity felt toward old

and rare things and into the recognition that human beings live in a physical world, cannot survive outside of it, ideally contributing to a strengthening of our interpersonal relationships and “how we experience knowledge.”

In reality, the main benefit that faculty saw as arising from undergraduate work in Special Collections was that it *inspires learning* in the students. For example, one instructor said that their students end up formulating “a number of other questions that they would have never...asked had they not...seen” the sources in Special Collections. Another emphasized this when he said that the students’ work in Special Collections “is appealing to that kind of tactile learning experience.” Students are learning by doing, by interacting with the objects in the archives. Their hands-on experience helps to make history more real for them. “It’s hard to pin down exactly what kind of learning that is, but I think it is a real...kind of learning, a historical awareness that comes through material culture in a way that it doesn’t come just through words.” Another respondent repeated this sentiment: “You’re connecting what you understand intellectually with a real object and often an object that has traces of the human being that created it.” Another faculty member related a personal experience interacting with physical primary sources: “[I] went over to the Missouri Historical Society...and held the original Lewis and Clark journals in my hands. I mean, it’s a pretty poignant moment you don’t forget. Like yeah, this really happened, William Clark wrote right here on this page. So it’s a little different than reading it online.” The experience that this instructor described is repeated over and over again as students engage with physical materials in Special Collections.

Perhaps the most basic but essential aspect of physical primary sources inspiring learning in students is the idea, repeated by two thirds of the respondents, that they create an excitement for learning in the students and a level of engagement with the material that was not present before. Said one instructor, “I think once they get disconnected and get into a collection, all of a sudden they really like it and they go, ‘This is different.’” Another instructor stated that “It’s a very different experience, and it’s always a really positive one for the students,” while a colleague in the same department said, “I think a lot of students now never experience the magic of the thing...There’s an opportunity for students to get excited about having an experience that might become increasingly rare.” Physical sources in Special Collections, then, are a key component in inspiring learning in students and an integral part of BYU’s goal of instilling in students a desire for lifelong learning and service.

### ***Opportunities and Benefits of Digital Primary Sources***

Far and away the most consistent comment from faculty about the benefits of digital primary sources is the vastly increased access to and availability of sources that would otherwise be impossible for the students to use during a semester-long course. Several faculty mentioned specific websites or platforms where undergraduates can access primary sources pertinent to their discipline, such as the British Library, 10,000 Rooms (an online platform for the transcription and annotation of Asian texts), Hathi Trust, Google Books, official country websites, and the Joseph Smith Papers Project. Several faculty members pointed out the exponential amount of new material that has been digitized in the past twenty years and how these newly digitized items have greatly enriched their disciplines and their research. More importantly for the purposes of this report, they emphasized how these digitized items have

enriched the research of their undergraduate students. In the words of one instructor, “There’s just so much easily available!... It opens whole new worlds.”

The increase in digitized materials has gone hand in hand with an increase and improvement in the technologies that make those sources available in the first place, to the point that they are ubiquitous in most major universities across the country. “The fact that we have tech podiums...make[s] it so easy for me to...use databases live” in the classroom, said one instructor. Another instructor mentioned the Office of Digital Humanities at BYU and their invaluable assistance in training and helping the students of that course to create and maintain a website that preserved their work. As students engage with these technologies and with tech experts, they themselves have the opportunity to develop useful digital skills. One faculty member cited the use of GIS (Geographic Information Systems) technology that she had taught in one of her courses: “[The] last time I taught the class I had students who did this amazing project about the settlement of the Ohio River Valley. And they picked one particular town and they found these historical maps from different areas from...the late 1700s up through the 1800s. They layered them...in GIS and then incorporated other primary sources. They were able to use digital images from museums and archives, so they could see the actual letters.” Projects and research such as this, produced by undergraduates, are not unusual in the courses taught by the faculty interviewed for this report. Even when the digital skills they develop are less glamorous than the example above, they are no less helpful for students moving forward. For example, one instructor said the following: “Being able to use something like a blog platform, like WordPress, to accomplish a professional purpose is a really good skill for them to have.” Whether modest or groundbreaking, the skills that students can acquire through working with digital primary sources equip them with greater skills as they enter graduate school or the job market.

Another opportunity provided to students through working with digital primary sources are the new and innovative tools that enhance their analyses. Recalling what an instructor said about the challenges of digital (“What does the object tell us that the facsimile doesn’t?”), he also asked the same question in reverse: “What can we tell from the digital facsimile that would be hard to tell from the object?” A faculty member gave an example of what can be seen only using digitized items: “Some of these manuscripts will be just...centimeters big, just tiny, and be incredibly intricate, and we can see it a certain way if we zoom in, but that is well beyond even what a normal person would be able to see if they’ve looked at the physical thing.” Several other faculty mentioned the ability to zoom in and out and see the items in greater detail, as well as the ability to annotate and transcribe documents and view transcriptions that other scholars have done in order to help students understand documents that would otherwise be inaccessible to them because of antiquated handwriting or unfamiliar languages. In the fields of Digital History and Digital Humanities, having access to digitized primary sources offers never-before-seen opportunities, as seen in the words of one instructor: “Distant reading, that kind of data crunching that you can do with electronic text is incredible. I mean, we’ve never been able to do that before, it gives us great power in how we analyze literary texts.” These tools and many more enhance and enrich the content instruction students are receiving and open up completely new worlds of inquiry and opportunities for them.

An additional opportunity for students unique to digital primary sources is the chance to contribute to real scholarship that other researchers will use through the creation of new digital

primary source repositories and tools. Many of the primary source assignments described by the respondents were project-based, meaning that the students, under the guidance of the instructor, were engaged in creating a specific scholarly product that usually was destined for use by others working in that field outside of BYU. These products include collections of critical editions, transcriptions and translations of manuscripts, online finding aids, Wikipedia pages, and more. The projects help students to learn “various editing techniques that are the professional means of ensuring quality when it comes to scholarly editing,” and the how and why of collaborative scholarship, a very common and important practice in many fields. The final product that they are creating is destined for an audience that extends beyond the course instructor: “With my digital humanities project we're trying to reach a much larger audience;” “I've been communicating with people all around the county and inviting them to look at the project, look at the research, and sharing the sources that we're making available through the project;” and “There was a real audience, you know, they know that this thing's actually going to be on the web and people are going to read it.” This practical application of scholarly skills is a great motivator for students to really engage with the sources and perform well in the class. Furthermore, through their work, they are adding to the growing body of digitized primary sources that others can consult. This is a great service to the scholarly and professional communities in which the students will work in the future. As one instructor said, “We have developed our own repository..., which will go public so that nobody else has to go through the tasks that we've gone through of searching.” While similar opportunities are available to students using exclusively physical primary sources, the impact of working in digital makes the impact of the students’ work more immediate and far-reaching.

In terms of teaching the students how to find and use primary sources, the digital world has a lot to offer. For faculty, digitization can make the selection and use of sources in the classroom much easier. They can also model how to find, evaluate, and use primary sources in class. One instructor said the following about how he does this with his students: “[On the computer] I walked them through...how I found the source that I was presenting on, told them why I chose the source that I chose out of the many I could have selected, told them how I narrowed in on that, and kind of walked them through that process.” Because of digitization and the placement of digital technologies within the classroom, faculty can lead by example, allowing their students to observe the same process they themselves are going to carry out later for their own projects. Furthermore, digitization makes sharing primary sources and lesson plans much easier. Faculty can share primary-source-based lesson plans among themselves, share digitized primary sources with their students, and students can share sources with each other in an easy and inexpensive way. Finally, student collaboration with primary sources is greatly facilitated by digital platforms. The platforms are not necessarily complex, such as Google Drive or Box, but they still allow simultaneous work among multiple collaborators, a process that will serve students well in their future employment.

#### **4. Faculty identified many challenges associated with teaching with primary sources**

This section discusses the main challenges that have arisen when incorporating primary sources into undergraduate courses. These challenges fall into two broad categories: challenges for faculty and challenges for students.

### *Challenges for Faculty*

The most basic challenge for faculty, in their eyes, was their lack of formal training in how to incorporate primary sources into their courses. The result of this lack, in their own words, was that, in their attempts to bring in primary sources in an effective way, they felt like “It was all...making it up as I went,” “I’m definitely winging it,” or “I’m still...trying to figure that out.” Their methods were a “trial and error kind of experience” or “exploring and figuring stuff out as I go.” This lack of training also produces complications in curriculum planning because once a course is designed it is harder to implement innovative changes in curriculum involving primary sources.

Related to this difficulty is the challenge of lesson preparation. Several faculty members indicated that undergraduates simply lack the skills to effectively study primary sources and that this complicated their ability to use primary sources because they had to teach students the difference between a primary and secondary source generally, distinguish how to find primary versus secondary sources, equip students with the appropriate terminology for primary sources in their field, inform the students of what to expect in the Special Collections reading room, train TAs to help students, or even explain the purpose and objectives in bringing primary sources into the class in the first place. Many indicated the need for prior pedagogical orientation or scaffolding to help the students along in the research process.

Reflecting on what they could have done better besides providing greater orientation to the students, many faculty members felt the need to modify aspects of the assignments dealing with primary sources rather than proceeding as they had originally envisioned the assignments. Due to their inexperience with teaching with primary sources, complications arose that they often had not anticipated, leading one instructor to comment after reflecting about one of their particularly difficult projects that at least it “was not a total train wreck.” One instructor commented on the logistical difficulties of using a TA to help in primary source instruction, declaring that “the students felt a little stressed having to rotate” between the instructor and the TA.

Faculty most frequently cited relying on their own research interests, disciplinary expertise, and/or their syllabus content to identify primary sources for teaching. One faculty member who teaches literature noted, “It always starts with the syllabus and what we’re reading and then I just go through the website. For example, I’ll go through the library’s website and Special Collections list of...what’s in the collections to see what might be around that lines up with what I’m teaching.” Faculty also rely on their subject expertise to identify repositories, databases, websites, and other types of sources to search for primary sources, and mine footnotes in their disciplinary literature. They described using library resources like catalogs and databases, both at the HBLL at other repositories, but also using Google and full-text sources like HathiTrust or Project Gutenberg.

Another logistical problem that faculty frequently encountered was the challenge of deciding which specific primary sources to use in a given course. “If it’s important for them to see an artifact,” one instructor asked, “which of the artifacts is it more important for them to see?” Faculty try to determine the best sources to use, but find they are limited by available sources. This sentiment was variously expressed as “Not all professors have the luxury of a really great Special Collections library,” or “There’s not as many [primary sources] available for the areas of

the world that I teach,” or “Twentieth-century primary sources are so much more available [than] if I was reading [in] the nineteenth [or] eighteenth [centuries] or...medieval times.” Often faculty used a printed “reader” textbook—i.e. anthologies of primary sources—but these do not always have all the sources an instructor might want and frequently change from edition to edition, obligating the instructor to search for a new reader.

Whatever an instructor’s preferred format of primary source, the reality is that the ideal source will not always be available for consultation in the conditions and circumstances that they might want. One respondent declared, “Based on the collection, that’s kind of the end of what [an instructor can] do in terms of primary sources in Special Collections.” In other words, local holdings, be they abundant or scarce, dictate what physical items are available for faculty to use in their courses. Because of this, faculty make do with what is available and what is accessible. For example, one instructor stated that, despite the importance placed on digital materials in that discipline, the students in those courses frequently used the physical library and Interlibrary Loan to acquire additional sources because that is what is available. Another faculty member affirmed that in their classes, “It’s always a combination of electronic sources online, sometimes actually old sources on microfilm and microfiche, and then hard copies,” suggesting that whatever format was available, whatever got the job done, wherever they could find the sources, that was what faculty used.

Intimately connected to the issue of primary source selection is the size, level, and composition of a given class. Regarding size, the larger the class, the more difficult it is to incorporate primary sources efficiently or meaningfully into it. “[It’s] harder...in the Fall, Winter with 150 students,” one instructor stated. Or as another said, “Just bringing in sample objects to talk about with the students, how do you get 30 people looking at a book object or a nineteenth-century periodical?” The challenges of class size are compounded when the course level is taken into consideration: “The hardest part...for the lower division classes is that they don’t really know what to do with it...It’s hard for them to see what they can do with [primary sources] at this level,” related one instructor. The introductory courses in particular are much more limited in the kinds of primary sources that can be incorporated—as well as the kinds of activities that they can do with those sources—because the skills and preparation of the students are underdeveloped, absent, or very unequal. While this is understandable since, in the words of an instructor in foreign languages, “I’m asking them to do graduate level work as undergraduates,” it increases the difficulty of using primary sources with these students.

On top of the aforementioned issues are the general challenges of teaching that faculty must help their students to overcome. However, as primary sources are brought into the mix, these challenges are compounded. Included among the struggles that the faculty encounter are the realization that most students are not likely to just figure out how to use primary sources on their own; the need to “re-teach them how to read something longer” than headlines or emails; low student commitment to the class and the work involved; encouraging students to manage their time appropriately and avoid procrastination; helping students “identify something exciting quickly so that they recognize the value...of what they might find”; and transferring their existing finding and research skills to the specific context of primary source research, among many others.

Underlying and magnifying all of these challenges is the issue of time. Two-thirds of the respondents mentioned this in one form or another: “So it is just a lot of time,” “Time is...often a challenge,” “Main challenge is time,” “It took a long time.” It is worthwhile to examine some of the time-related factors that they mentioned. The first is the time commitment required for an instructor to design and implement a research assignment requiring primary sources amidst their many other teaching, research, and citizenship responsibilities. This includes scheduling time to go down to view Special Collections materials prior to class to select materials to use, translating primary sources, crafting and preparing assignments, and acquiring new skills to implement in the classroom. For example, one respondent expressed interest in developing an assignment that would require students to use specialized digital editing tools to interact with the primary sources, “but the time commitment involved for the person in charge is quite high.” In this regard, one instructor expressed an interesting perspective: “It feels like every year we get more learning outcomes from the college or from the university. You now have to do more undergraduate mentoring projects, more computer literacy, ...etc.” The sentiment appears to be, then, that while laudable and maybe even necessary, these additional responsibilities, some imposed by administrators, reduce the time available for faculty to craft the assignments that would allow them to incorporate primary sources into their undergraduate classrooms.

A faculty member described putting together a primary source reader for an undergraduate class: “It took a long time, but I spent all summer...compiling all kinds of different collections of primary source excerpts that I had the library course reserve scan and approve and do all that copyright stuff.” Library search tools may not always allow them to manipulate searches in ways that seem useful to them. The same professor lamented, “I wish that there was a simple way to search for only books that have pictures [while crafting an assignment]...instead I just laboriously went through every book that was listed [in the catalog search results] as being published in [the historical period] and check to see if it had in the details, if it mentioned images.” While the sheer amount of searchable content can be overwhelming to faculty, they are also highly aware of gaps in digital repositories and other electronic portals and adjust their research strategies accordingly.

Once identified, however, difficulties remain when attempting to access those primary sources. Local museums or special collections departments in libraries may not have any relevant holdings for a given class or field, requiring faculty and students alike to travel to non-local institutions to consult their collections, something which is usually impossible given the financial and time constraints associated with travel during an active semester. If somehow researchers are able to visit an off-campus primary source repository, some of these institutions “don’t want undergraduates in their collections,” one instructor observed, while others may place restrictions on certain materials that either prohibit their use entirely or require special permissions to use them. Even when distance is not a factor, such as for digitized materials, the items may not as be complete as one might like. For example, one respondent mentioned that “a few countries...will keep an archive [of speeches] of the past one or two presidents, but once you go beyond that...you’re...on your own.” This is particularly true when attempting to access primary sources held in international archives.

Added to this are the time constraints of a 50- or 75-minute class, two to three times a week over a period of three-and-a-half months. Specific problems mentioned by faculty involve the



increased difficulty of the primary sources, which results in being able to do less with those same sources; the insufficiency of a single class period to include primary source analysis and class discussion; and most frequently, the “tension between...how much time do you spend on [teaching students how to use primary sources and] how much time do you spend on presenting... content.” Several voiced the concern that they often had to sacrifice other content and assignments to bring primary sources into the classroom. One expressed this conflict as a “tension between...focusing on content...and focusing on...skills. Skills such as...how to learn and how to read and analyze primary sources and how to use them to...develop an argument,” which are just as important as the disciplinary content of a course. For those faculty engaged in project-based courses or courses with real-life applications and impacts, the timeframe of a single semester presents a notable additional level of complexity and difficulty.

Given these challenges, it is an unfortunate but entirely understandable consequence that oftentimes faculty cannot always demand the highest level of work from students: “We as [faculty] will acquiesce to [students’ expectations of a quick research process] instead of realizing that part of our job is to actually engage them in something...that’s challenging but rewarding because of that challenge, instead of rewarding because it’s quick.” The ideal for faculty would seem to be an intensive and in-depth exploration of the sources by the students, but the time constraints of a single term or semester do not allow for this kind of work. Additionally, because of their time commitments, it is sometimes the case that faculty do not explore and are therefore unaware of the local special collections materials available to them, unknowingly diminishing the potential impact of the primary source assignments they are attempting to implement in their courses.

### ***Challenges for Students***

Faculty not only commented on their own difficulties. They also commented on the difficulties they have seen their students struggle with. Many of the problems discussed below have counterpoints in the challenges faced by faculty and as a result there is necessarily some overlap. However, the distinctions made here are useful, both as things to consider when planning to incorporate primary sources into undergraduate classes, as well as specific action items that faculty can implement to increase the possibilities of success in this regard.

A fundamental principle expressed by many faculty members was the idea that, simply put, working with primary sources is hard for students. Whether that is finding sources, carrying out phone interviews for textual analysis later, or researching hitherto unstudied texts or works of art, the level of the work that faculty are asking them to do is, initially at least, beyond the skill and knowledge of undergraduates. As one instructor put it, “I’m asking them to shoot beyond the mark hoping that they get to the mark somehow.” This important concept should be taken into consideration in working with students to teach them how to research with primary sources.

The underlying cause of this difficulty is obvious: a lack of knowledge of the field, a lack of awareness of the sources and repositories available, and a lack of experience doing research with primary sources. Undergraduates are, in general, almost wholly unprepared to undertake primary source research without guidance. They are unfamiliar with the objects that they are called to study and they simply do not know where to start with items distant from them in terms of time, geography, and culture. For many students this is the first time they have worked with primary

sources, much less stepped into an archive. They lack the training, vocabulary, or skills to approach the sources or articulate a thesis regarding them. They are unacquainted with the contours and context of a given field to be able to recognize the significance of a given source and lack the overall vision of a source or a project. These deficiencies on the part of the students should not imply that they are unintelligent. Simply, they reflect, in the words of one instructor, that “they just don’t have the depth of...knowledge that I have...[and]...there’s no reason why they should.” It is the role of the instructor to provide that, “to somehow create the experience that is going to be manageable for them because they don’t know how to deal with [these items] as objects of study. Then you have to give them the apparatus for doing that.”

Students need the most help in developing the skills of sophisticated researchers. These skills include: learning how to find both primary and secondary sources; selecting the best ones for their project; teaching them to read deeply the sources they utilize, not just skim them looking for interesting parts; learning to use the library effectively and efficiently, including its finding aids; to go beyond Google searches; checking the appropriateness and validity of their sources; teaching “the students how to...collect the data and then interpolate or analyze from the data rather than making a thesis claim and then try to find the data that it supports;” “helping students realize they need to allot a certain amount of time prior to going to identify the sources that they actually want to have pulled for them” in the case of physical collections; disabusing them of the notion that research is a quick process; “helping them come up with topics that can integrate this primary research into the kinds of research and writing skills that we’re doing;” among many other struggles.

Some specific challenges regarding the research process bear elucidating in greater detail. First, one instructor pointed out the necessity to follow up with their students on what they had learned, reminding, and encouraging them to put those principles into practice. Their students can forget instructions on how to search, as one professor related: “I take my [senior] class over to the library every year to meet with [a librarian], talking about all of the extant collections that BYU has, as well as all the digital things they’re subscribed to, and how to find things in newspapers and government documents and all these things. And so, we kind of think, okay, we just told you how to do it, go do it. But then you see them in a couple weeks, and they’re still deer in the headlights.”

Second, students are often overwhelmed by the amount of material that they must wade through to find the best sources, and this applies to both physical and digital materials. One instructor indicated that if they do not include preparations in the primary source assignment to mitigate this difficulty, “then the feeling of being overwhelmed just cancels out all the...good intentions of getting them connected to primary sources.” Another said, “the challenge isn’t accessibility... the challenges instead are finding your way through it. Many students will come to me and say, ‘I spent six hours yesterday and I couldn’t find anything on X.’ And I will say, ‘What the heck do you mean you cannot find any sources? You have like a billion resources in these databases and you couldn’t find anything?’...But in their mind, it doesn’t work, it’s not the right resource, right? So that’s the number one complaint or the number one challenge is, ‘I can’t find X,’ but what that means in their mind is ‘I’ve already decided what data should be there and the data isn’t cooperating with me and so I’m getting frustrated,’ right? So, you sort of have to teach the students how to collect the data and then interpolate or analyze from the data rather than making

a thesis claim and then try to find the data that it [supports].” Students’ general struggles with information literacy skills can be compounded when they engage with primary source research.

Third, students often do not know how to distinguish a good and appropriate source from a spurious, mislabeled one, nor how to determine bias one way or the other. Other faculty talked about how their students have trouble constructing searches and evaluating their search results or have difficulty with evaluating the validity and appropriateness of sources. One respondent reported it was a challenge “helping them recognize that they have to dig deeper to verify or [to] find the right kind of access to the source they’re trying to find. For example, if you’re looking for whatever manuscript, it might even be the right image, but if you’re pulling it off of somebody’s Pinterest post, that’s probably not the way you should get at it, you know? But because it’s expedient they want to.” All of these aspects require specific, explicit attention on the part of the professor.

Fourth and final among challenges regarding the research process, the language and handwriting that appear in primary source documents are the cause of substantial desperation, confusion, and frustration for the students. Language in this case refers both to foreign languages that the students may not speak, or speak in a limited fashion, as well as antiquated vocabulary with which the students are unfamiliar, requiring either a translation or a great deal of study on the students’ part. Even when language per se is not an issue, the handwriting, script, or characters in which a document is written are often unintelligible to students unversed in paleography and older scribal practices. These linguistic challenges are significant and require many tools, strategies, and workarounds to allow students to work with the texts they are analyzing. Added to these challenges is the fact that many primary sources are the product of cultures far away in time and space from most of the students who will analyze them, making an accurate understanding of the materials more difficult.

Students also experience challenges outside the research process itself. Like the faculty, students face significant constraints on their time. These constraints—other classes, internships, family, the operating hours of Special Collections, among others—limit the time that they can dedicate to primary source research, and the kinds of sources they have access to, especially if those sources are in Special Collections. Likewise, when primary sources appear in print and are available for purchase, these are sometimes prohibitively expensive for the students. One respondent stated that, “For the one course I’ve talked about, if I made them buy books, it would be \$700.” While such a high price tag is not always the case for every class or source, the financial capacities of students are more often than not unable to absorb the costs of rare and expensive primary sources.

The last set of challenges that students face is attitudinal, which in turn affects the level of engagement and commitment with the class and the primary source assignments. A predominant sentiment expressed by the faculty was that the students expect research to be quick, easy, comfortable, convenient, and requiring only minimal effort, and when it is not, they can become bored, frustrated, and irritated. Faculty acknowledge that students are busy and can have competing responsibilities or uneven access to technology that makes primary source research more difficult. While recognizing the benefits of digitization and online tools, faculty are concerned about students’ tendency to seek quick results rather than learning the ins and outs of

the research process. “Students are pressed for time, and the rationale of having to consult a physical original doesn't always clue into these really digitally attuned students. So, one of the challenges that I've faced is exactly that, getting them to understand why it's important to go see the physical item,” reflected one faculty member.

Faculty members overwhelmingly report that undergraduates prefer searching electronically using the internet or the library's electronic resources. They are dismayed and frustrated by students' inability or unwillingness to go to the library. “One of the biggest challenges, actually, that I'm aware of is students who don't know how to use the library and have no familiarity with it, [I'm] kind of horrified by that,” admitted one faculty member. Another reported, “The thing is, so many of the students...if you look at their bibliography for the research papers, it's whatever they could find online. They're not going into the library.” Another noted, “I suppose that, in some ways, the Internet has been a blessing and cursing because you know, we used to have to go over to the archives and go through the card catalogs and go through the periodical literature and, you know, do all those things. And now they're like, I can just get on Google, it'll tell me everything, I can pull up a couple articles and I'm good to go. Well, no. You're not going to find as many primary sources as you think.” It was also observed, “[L]azy is maybe not the best word but I think they're so conditioned in a lot of ways to...get on the library catalog they type in a search term and they just...use the first three sources that pop up...and they don't dig any deeper so that. That's something I find I'm constantly like battling against.” This expectation of quick results of course extends to primary source research. Another faculty member said, “I found that students can be a little frustrated by the amount of time necessary to just explore an archive that they can't just go click online and type in a word search and there [are] the three sources they need to use. Our current students are used to immediate results and Special Collections don't lend themselves to immediate results.”

Faculty want their students to branch out from digital searching. “I take every opportunity I can to actually force them to enter the building because I think it's really important,” said one professor. Faculty try to compensate for students' reluctance and weak search skills in various ways. They provide instruction about and model the research process, either in class (according to four respondents) or by bringing them to the library for instructional and/or hands-on presentations (eleven respondents). Faculty often provide in-class or one-on-one advice to students on search strategies like using library databases and other tools, talking to librarians, or footnote mining. Faculty are also likely to steer their students to sources, often by building a curated list of resources or by identifying specific portals, collections, or repositories students must use for assignments (eight respondents). Seven respondents reported creating scaffolded assignments or setting narrow assignment parameters to help students be more successful in their research. One professor noted, “I find that if I don't have a pretty specific task delineated for them when I send them off to do the research, they struggle [and] spend so much time wandering that I do almost always restrict their...search in some way.”

One instructor said regarding finding and evaluating appropriate sources that, “They're going to go for the news article, for the blog, for the fun op-ed before they pick [up] the academic article.” Furthermore, many other faculty members suggested that “the greatest challenge for teachers with primary texts is going to be to convince students that it's worth their time to slow down and make note of details.” The acceleration in the use of digital technologies and the speed at which

students are accustomed to acquiring information suggest that this will continue to be a challenge for the foreseeable future.

Ultimately, faculty want their students to learn to value the process of primary source research. As one professor noted, “I think that's been the biggest challenge, is helping students to realize or to find purpose and even joy in the exploratory process of Special Collections, rather than, this is an assignment that's due in two weeks, I just have to find the first source and get it done.” Because teaching faculty and librarians are equally invested in helping undergraduates to become successful researchers, there may be additional opportunities for the library to work with faculty to improve discoverability and library instruction related to primary source material in our collections.

It is worth noting at this point that the difficulties described here are challenges as reported by the *faculty*. We are missing the student perspective and so a future opportunity for study might be how the students view the inclusion of primary sources in their undergraduate course curriculum. It is also worth noting that many of the faculty are working hard to compensate for these challenges, employing a variety of strategies to instruct students in search techniques and foster use of library resources—and these strategies sometimes involve librarians.

## Discussion

Teaching with primary sources is a powerful way to help students develop critical thinking and analytical skills that are useful in other aspects of their lives. However, many faculty members do not teach with primary sources because of the challenges inherent in using them. The biggest challenge for faculty is time—time to prepare to use primary sources and time to help students use primary sources. Even though the faculty we interviewed have all successfully integrated primary sources into their teaching, they generally accomplished this through trial and error. They rely on what works for them as researchers because their training has not provided them a set of guidelines or best practices for pedagogy with primary sources. As a result, even highly motivated faculty may be frustrated by the time and effort needed to create and refine primary source assignments and to compensate for students' varied abilities.

Special collections and subject librarians are well positioned to help faculty navigate these challenges. They can aid in discovery, assignment design, and teaching students how to use primary sources. It is worth noting that all of the successful examples of teaching with primary sources brought up by the interviewees involved collaboration between a faculty member and a librarian. This point cannot be overstated: librarians and faculty need to work together to design successful primary source engagements.

## Conclusion & Recommendations

BYU faculty are doing amazing things with primary sources in the undergraduate classroom. We were inspired by the variety and depth of projects that respondents have designed for their students and their willingness to involve undergraduates in their own research. The faculty we spoke with find primary sources to be very valuable in their own professional work and place great pedagogical and personal value in integrating primary sources into their teaching. They are

motivated to provide their students with opportunities to engage with primary sources. Faculty efforts are even more commendable considering that they have received little formal training in primary source pedagogy and have had to figure out on their own how to integrate primary sources into their courses—a process which often takes much time and effort. Since training and conversations about teaching with primary sources seem to be happening in sporadic and informal ways within the academic departments, there is ample room for the HBLL to start a broader dialogue with faculty, perhaps in partnership with the Center for Teaching and Learning or the Faculty Center.

We were gratified to hear that so many of the respondents have positive feelings about the HBLL and have had good experiences with library personnel and library services such as class presentations and digitization of primary sources. Building on these positive experiences, we believe that the Library is well situated to support faculty currently teaching with primary sources and to promote teaching with primary sources more widely across campus to other interested faculty members. An overarching theme we heard from faculty related to primary source instruction was the challenge of *time*. It takes them time to identify and incorporate primary sources into their courses; time to build assignments; time to instruct students how to find, evaluate, and use primary sources; and time to learn and refine their own pedagogical techniques. The Library can offer time-saving services to faculty related to primary source pedagogy, discovery, and library instruction.

We recommend that the Library and Library employees pursue the following to help faculty successfully get started (and continue) teaching with primary sources:

- The Library, the Center for Teaching and Learning, and the Faculty Center should partner to create a module for new faculty discussing how to design and integrate primary sources into their courses, including how to avoid or mitigate the challenges the faculty indicated, whether related to their own deficiencies or those of the students.
- The Library should host faculty brown bag discussions about teaching with primary sources. These discussions should feature Special Collections employees and faculty who are successfully teaching with primary sources.
  - Brown bag discussions about teaching with digital primary sources would be of particular use to faculty who want or need to use born-digital sources or digitized surrogates in their courses.
- The Library should hold workshops to help faculty design assignments that leverage primary sources.

To foster better experiences for faculty and students searching for primary sources, we recommend:

- The Library should continue to improve discoverability of Special Collections materials, including enhancing search features in ScholarSearch and enhancing finding aids. Faculty who teach with primary sources should be contacted for feedback or focus groups about their specific search needs and their observations of students' search behavior.
- The Library should build tutorials on searching for primary sources and iterative search strategies. These tutorials could be used for asynchronous instruction or for in-class instruction.

- Brown bag discussions and faculty workshops should address such topics as scaffolding primary source discovery in assignment design and teaching students search strategies.

Librarians and curators should redouble outreach efforts to faculty to promote primary source instructional services and primary source literacy. We recommend the following:

- Library employees should promote their ability to save teaching faculty time by bringing their students to the library for hands-on instruction and practice working with primary sources, whether physical or digital.
- The Library should work to create specific teaching modules and activities related to primary source discovery to use in instruction.
- The Library should work to create specific teaching modules and activities to assist students in evaluating and contextualizing digital primary sources.
- The Library should work closely with faculty members to assess the effectiveness of these instructional modules.

Finally, it should be acknowledged that the University makes a tremendous investment of resources to be able to offer primary sources through the HBLL via the Library's general and special collections, database purchase and licensing, and the Library's digitization program. The faculty at BYU see great benefits for pedagogy and student research using these collections, both physical and digital, and are quite optimistic about future opportunities afforded by ongoing digitization efforts at the HBLL and institutions worldwide. Continued innovation in undergraduate teaching and research on campus will require a commitment from the University to providing the staffing, storage space (both physical and electronic), and other resources necessary to preserve and make primary source collections available, and in particular, to meet the rising demand for digitized materials.

# Appendix A

## 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*

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



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?