

Archival Literacy for History Students: Identifying Faculty Expectations of Archival Research Skills

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ABSTRACT

Although finding, interpreting, and using archives is inherent in the study of history, no standard identifies the archival research competencies college history students should possess. The purpose of this study is to identify history faculty expectations of undergraduates regarding their archival research skills and, based on those expectations, to create a list of archival research competencies that could be incorporated into the history classroom or introduced by the archivist in archival literacy sessions. The study includes viewpoints of different stakeholders, a review of course syllabi, in-depth interviews with history department faculty at a large public research university, and comments from faculty and recent graduates on a draft list of archival competencies for history students. The practical recommendations encourage the implementation of the competencies for both history faculty as well as for archivists involved in teaching archival research skills to students. This article represents a preliminary report based on the authors' completion of the first phase of their research. In the second phase, currently underway, history faculty, university archivists, and selected academic librarians at a representative sample of other institutions will provide comments on the list of competencies developed in the first phase. These comments will be considered for a revised list of competencies that will be published at a later date.

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KEY WORDS

Academic Libraries, College and University Archives, Information Literacy

As frequent users of archives, historians rely heavily on archival source materials for their research and scholarship. To succeed in their professional endeavors, historians need to know how to use archives effectively in their research. History programs do not systematically offer training in archives, leaving history graduates without the skills they need to succeed.¹ Studies show that rather than learning archival research skills in history courses, most history majors learn by trial and error, an inefficient and often frustrating process that can result in historians' dissatisfaction with archivists and the services they provide.

Complicating the issue is the lack of standards defining the research skills college history majors should master to use archival materials effectively. Archivists can help fill an educational gap for history students, but first they need to know what skills historians need to function effectively as archival researchers. Clearly, the archival literacy competencies needed for teaching history students how to conduct research must be identified. The identification and standardization of archival literacy competencies for historians would enable archivists to demonstrate the types of research techniques and training they can provide to history students. Archivists also need tools for communicating with history faculty and convincing them of the value archivists bring to the overall educational enterprise.

The purpose of the first phase of this two-part study was to identify the extent to which primary sources are incorporated into history courses at Purdue University, establish the level of importance history faculty place on teaching students to use primary sources, and develop a list of competencies based on what history faculty at a large public research university expect students to know about using archives. These competencies are currently being tested on a nationwide basis for applicability in teaching archival literacy to history students. The resulting list of competencies is intended to be used by archivists, librarians, and history faculty to integrate archival competencies into courses, create lesson plans, and identify content for archival literacy instruction sessions. The competencies are also meant to assist archivists in communicating with faculty, supervisors, donors, and other stakeholders the value they bring to educating novice archival researchers, by providing specific examples of the skills archivists can teach.

This article represents one step forward in identifying a solution to the problem of how to provide archival literacy instruction to history students by identifying the archival research skills history students need at a major public research university. The findings, based on syllabus reviews and in-depth interviews with select history faculty at Purdue University, represent a first attempt to compile and standardize a list of archival literacy competencies based on those skills. This preliminary report is based on the authors' completion of the

first phase of their research. In the second phase, history faculty, university archivists, and selected academic librarians at a representative sample of other institutions will provide comments on the list of competencies developed in the first phase. These comments will be considered for a revised list of competencies that will be published at a later date.

Literature Review

This review examines the literature on the use of archival materials in learning history, introduces the concept of *archival literacy* as an application of information literacy, and discusses the literature on learning archival literacy competencies.

USE OF ARCHIVAL MATERIALS IN LEARNING HISTORY

The importance of archival sources in historical research and writing can scarcely be exaggerated. Historians have long relied upon archives as essential source materials,² and recent studies confirm the continued significance of archives to research in this field.³ According to a 2004 survey of 278 historians, the sources they used most frequently for primary information were, in order: archives, manuscripts and special collections, books, newspapers, and other sources.⁴

Digitization efforts since the 1990s have resulted in a plethora of archival source materials available online. Although students entering college today are more prepared to deal with primary source documents than any previous generation, they have not yet developed the skills they need to find and identify archival sources on their own.⁵ In an article on undergraduate research using primary sources, Doris Malkmus urged archivists to collaborate with teachers to offer more effective educational experiences utilizing primary sources.

In his practical guide written for historians on how to conduct archival research, Samuel Redman pointed out that despite digitization efforts by many archives and special collections, so many archival materials remain undigitized that it is critical for historians to know how to locate and effectively use archives in person in a physical repository.⁶ Redman's short manual presented his advice as an experienced user of archives, and, although the information he shared with novice historians is valuable, it does not provide a list of archival skills or competencies that archivists and educators could use to inform archival literacy instruction.

ARCHIVAL LITERACY

Information literacy encompasses the ability to know when information is needed; to identify the sources needed to address a given problem or issue; to find, evaluate, and organize the needed information; and to use the information effectively.⁷ As such, information literacy encompasses a range of information-related activities, skills, and processes.

Among information literacy scholars is a strong movement toward contextualizing the teaching of disciplinary research competencies.⁸ Because information literacy competencies differ for scientists, health practitioners, social scientists, and humanists, the Association of College and Research Libraries (ACRL) and related organizations have developed a variety of information literacy standards for use in teaching particular subjects.⁹ Unfortunately, archival literacy standards for the history profession have not yet been developed. This leaves the history professor without best practices to guide what archival research skills should be incorporated into the curriculum. Archivists can and should play an active role in addressing this need by communicating the archival literacy competencies they can impart to students either in formal instruction sessions or in informal archival outreach and orientation activities. We refer to archival literacy as the knowledge, skills, and abilities necessary to effectively and efficiently find, interpret, and use archives, manuscripts, and other types of unique, unpublished primary sources.

LEARNING ARCHIVAL LITERACY

At the college level, students commonly receive library instruction on the use of electronic, print, and microform resources. Not as many undergraduates, however, receive a glimpse of the other world of resources contained in archives. Even in disciplines such as history, which expects students to identify and select primary sources to use as evidence in support of an argument, few courses provide adequate study of archival principles and research methods.¹⁰ Historians must often learn these skills on their own, through time-consuming and inefficient trial and error.

Major differences between libraries and archives justify specialized instruction on archival research. Archivists and teaching faculty have found that students who express confidence in their information literacy skills are not at all prepared for working with archival materials.¹¹ Several scholars have mentioned the need to address *archival anxiety*, or the intimidation students feel using archives, due to the following factors:

- Rules on accessing and handling archives differ from those for circulating collections.

- Archival collections cannot be browsed.
- The organization of collections differs significantly between libraries and archives.
- Many students are unfamiliar with using archival finding aids.

Providing real-world experiences for students to conduct research in an archival repository resulted in reduced anxiety and increased students' confidence in their research abilities.¹²

The majority of special collections in academic and research libraries offer some instruction to students. Archivists and special collections librarians view instructional activities as important in fostering future researchers, advocates, and donors.¹³ But instruction does not often focus on archival research skills and learning how to locate sources. Instruction is largely limited to orientations, tours, and showing materials selected by faculty for students to view.

Almost no discussion exists in the archives literature about standards, competencies, or learning objectives for developing archival literacy skills in history students. Typically, publications addressing the education of historians attempt to cover several large areas, including administrative aspects,¹⁴ the shift in the education of archivists over the past half-century, and the increasing distance between the fields of history and archival science.¹⁵ The recent publication *Past or Portal? Enhancing Undergraduate Learning through Special Collections and Archives*¹⁶ included forty-seven short case studies demonstrating the breadth and variety of instructional activities using archives and special collections. The majority of the case studies did not address intended learning outcomes. Without clear statements of what knowledge, skills, and abilities students should gain as a result of successfully completing a course, it is difficult to assess whether the course goals have been met. This topic has been thoroughly neglected in the literature.

The Joint Committee on Historians and Archivists of the American Historical Association, the Organization of American Historians, and the Society of American Archivists acknowledged in their 1993 publication *Historians and Archivists: Educating the Next Generation* that "historians recognize that knowing how to use archives has been and will continue to be a basic part of historical research."¹⁷ Courses in research methods would be a natural venue for teaching archival research skills to history students, but a survey of 143 history departments indicated that few courses include such instruction.¹⁸

Several authors emphasize the need to develop archival research competencies that could be incorporated into archival user education and instruction programs. Beth Yakel and Deborah Torres identified three general types of knowledge necessary to work effectively with primary sources: domain (subject) knowledge, artifactual literacy, and archival intelligence.¹⁹ Defined as "a researcher's knowledge of archival principles, practices, and institutions,"

archival intelligence is the most natural component for archivists to teach; yet, the archival community has not defined the skills of an effective archival researcher.²⁰ Yakel and Torres identified clear gaps in users' knowledge: understanding archival terminology; researcher rules and procedures in archival repositories; and interpretation of finding aids, catalog records, and related representations of primary sources.

Joel Kitchen's "History," a chapter on information literacy in that discipline,²¹ provides excellent treatment of primary sources within the purview of library and Web resources, but clearly slights archival research. The author mentioned the *National Union Catalog of Manuscript Collections (NUCMC)* and manuscript records in WorldCat, as well as the ArchivesUSA database (now known as Archive Finder), but acknowledged archives only insofar as they are represented online.

Following the work of the Joint Committee on Historians and Archivists as well as Yakel and Torres, Peter Carini identified a short list of concepts that could serve as a starting point for creating a list of archival research competencies. In his article advocating that archivists become more involved in teaching, he identified a clear need for guidelines on what students need to know about archives.²² Carini participated in a discussion held by the New England Archivists to begin developing a set of core concepts archivists should impart to students. The concepts included evaluation of the physical artifact; understanding of the historical context and relationships between primary source materials; defining a primary source; methods of analyzing documents; and how to identify relevant collections.²³ He encouraged archivists to further identify and develop the core concepts needed. Unfortunately, archivists have not yet answered this challenge.

In 2012, the American Historical Association initiated a project to identify the competencies a student should have upon completion of a history degree program. The draft document confirmed the need for history graduates to use information, distinguish between primary and secondary sources, develop the historical context for sources and evaluate them for credibility, and select appropriate primary and secondary sources as evidence in an argument. Surprisingly, the document did not mention archival materials or the specific skills needed to locate and use them effectively.

The literature reveals the stark reality that almost no sources exist addressing the skills or competencies comprising archival literacy. This creates a clear knowledge gap in meeting historians' needs for using archival sources in their research.²⁴ Unfortunately, not all historians recognize the need to incorporate archival research skills into the teaching of history students. It is evident that these students have not been systematically offered training in the research skills they need for professional success. They must learn techniques and strategies while on novice research trips, rather than through systematic preparatory

instruction involving cooperation between professors in their departments and archivists in nearby repositories. Time and money represent significant constraints on historical research when travel to a distant archival repository is necessary, making the process of learning on one's own how to conduct archival research inefficient, less productive, and more expensive.

Purpose

This study begins to define core competencies for history students in using archives. Its purpose was to develop a preliminary list of knowledge, skills, and abilities related to finding and using primary sources and archives that undergraduate history majors should master. As the first phase within a larger overall research project, we sought input from history faculty at Purdue University on what archival skills they perceive history students to need. The first phase of the study was limited to input from faculty at one institution. The second phase expands the study to incorporate input on archival research competencies from a national perspective.

Methods

Purdue University is a large public research and land grant university in the Midwest. The university enrolls 39,000 students, 77% of whom are undergraduates, and has 1,800 tenured and tenure-track faculty.²⁵ The school is particularly strong in STEM (science, technology, engineering, and math) disciplines, with more than half of the students enrolled in majors in those areas; it ranks fourth among colleges and universities in total STEM degrees conferred.²⁶ The Department of History in the College of Liberal Arts has approximately 200 undergraduate majors, 155 undergraduate minors, and 60 graduate students.²⁷

Our team, the Purdue University archivist, the librarian who is the liaison to the history faculty, and a professor of library science with expertise in information literacy collaborated to conduct the study. Members of the Purdue history faculty were involved and informed throughout the process as stakeholders with experiential knowledge.

STUDY PHASES

After receiving approval from the Purdue Institutional Review Board, the first phase of the study commenced and comprised the following 4 stages.

1. **Compilation of Potential Archival Literacy Competencies**

Since the review of the literature revealed no established list of archival competencies that faculty expect history majors to have, in August

2012, the Purdue University archivist drafted a list of 13 competencies. She based these on her 10 years of experience teaching undergraduate students either as a part of semester-long courses or in providing one or multiple teaching sessions for a course. During her teaching, she frequently observed components of archival research that students found frustrating or difficult to understand. The archivist also discussed the competencies with 5 other staff members in her division who were seasoned instructors. Two of the archives staff were graduates of the history program at Purdue; one had been an undergraduate student and then became an archivist after obtaining his MLS and the other was a recent graduate student in the Purdue Department of History who had just been awarded his PhD in the program. Their participation expanded the number of stakeholders with experiential knowledge to represent the perspectives of alumni from the history program.²⁸

2. Review of Course Syllabi

We analyzed 37 syllabi representing all of those available for all undergraduate history courses offered at Purdue University during the fall 2012 semester. We then identified the courses that included coverage relating to archives or other primary sources. The course listing for the semester comprised 70 courses; however, only 54 would have used syllabi (courses listed as directed reading hours, film labs, research credit hours, and cancelled courses were automatically disqualified). Of the 54 total courses that could have syllabi, 37 included links to syllabi on the history department's website (68.5%). For the 17 courses that did not post links to syllabi, but *could have* (i.e., discrediting those listed as directed reading hours, film labs, and research credit hours), the information on the site included only the course number, title, instructor name, meeting schedule, and location. It can only be assumed that some history faculty chose not to share their syllabi openly.

The university archivist developed the following indicators of faculty expectations for students to find and use archives or other primary sources:

- The course objectives included reference to primary sources.
- At least 1 assignment used primary sources.
- Assigned reading included at least 1 primary source.
- Recommended reading included at least 1 primary source.
- Assigned reading focused on locating primary sources.
- Recommended reading focused on locating primary sources.
- The course included a field trip to an archival repository.

We reviewed each syllabus and recorded whether the indicators were present.

3. Interviews with Selected History Faculty

Following the assessment of the syllabi, the library liaison to the History Department recommended 3 history professors to invite for in-depth, hour-long interviews to determine their expectations for history students relating to archival awareness and research skills. The 3 professors were chosen because of their known interest in archives and experience in teaching courses using primary sources. The librarian and the archivist conducted structured interviews with the 3 history faculty members, asking a set list of questions to give all interviewees equal opportunities to respond within the same research constructs. The archivist and librarian recorded the interviews in November 2012. The interview questions are included in Appendix 1. History faculty made valuable suggestions on different aspects of the archival literacy they expected their history students to achieve prior to graduation (see Appendix 2). These additional competencies were incorporated into the initial list compiled by the archivist.

4. Request for Faculty Comments on the Competencies

After incorporating suggestions from the interviews, the authors sent the revised draft list of competencies by email to all 33 history faculty members, as well as separate emails to 2 recent graduates of the history program, asking for their comments on any competencies missing from the list, as well as any that should be eliminated. Although several of the respondents merely thanked the authors and confirmed that the list appeared complete, 3 faculty members and 2 graduate students in the History Department provided substantial feedback that greatly enhanced the initial draft list of competencies. Their comments are found in Appendix 3 and were incorporated into the final list of 51 competencies.

Triangulation to strengthen the validity and credibility of the findings occurred in these ways:

1. The research methods included expert opinion, interviews, syllabi review, and surveys.
2. Three coresearchers collected and analyzed the data.
3. Data from several sources were included.

Results

The review of 37 course syllabi posted on the Department of History website in fall 2012 indicated that 10 of the syllabi (37%) referred in the objectives to primary sources. Twenty-one (57%) of the syllabi indicated that at least 1

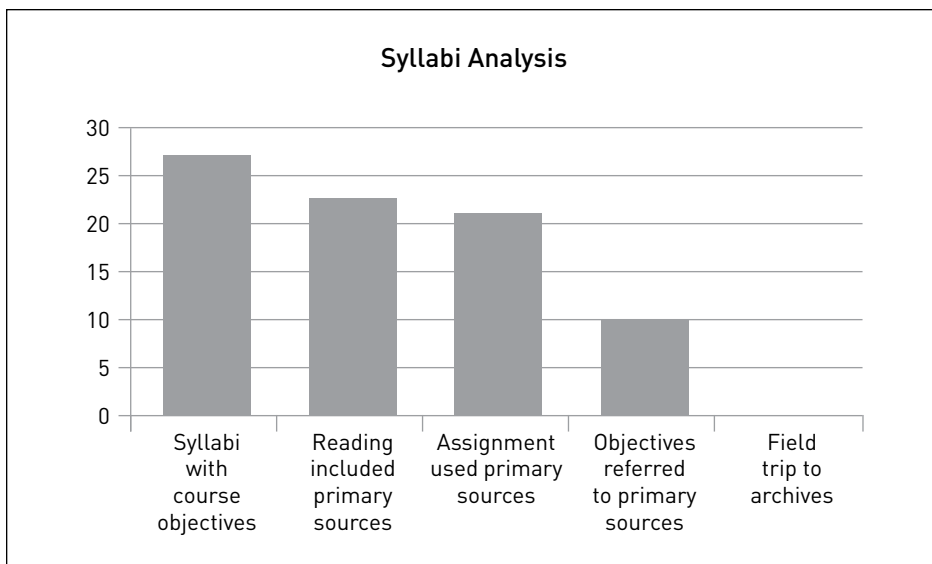


FIGURE 1. Course syllabi were analyzed for the inclusion of primary sources or archives.

course assignment used primary sources. Twenty-two syllabi (60%) included an assigned reading of at least 1 primary source. None of the syllabi indicated that the course included a field trip to an archival repository. Figure 1 shows the results of the syllabi analysis.

The interviews conducted with the 3 history faculty members confirmed and enhanced the original draft list of competencies. The competencies provided by the history faculty built upon or related to the original list of competencies, with 1 exception. One faculty member, having conducted extensive archival research internationally, substantially improved the list of competencies by emphasizing the ways archival repositories outside the United States can differ radically from those in America. Based on her international research experiences, we added to the competency list the need for historians to acclimate to the variety of ways in which repositories operate outside the United States.

One recurring theme was the importance to history majors of using original archival sources (rather than relying upon digital, microfilm, or print surrogates). Another fortuitous realization on the part of the faculty interviewed was that they could work more proactively with the archivist to incorporate archival research training into existing undergraduate research courses. Faculty commented on the value of providing undergraduates with a real-world research experience using archives the way a professional historian would.

Including the suggestions by faculty members and graduate students significantly expanded the original list of 13 competencies created by the archivist to 51. The faculty and graduate students did not suggest that any of the original competencies be removed; however, for the sake of organization and

consistency, many were reworded or categorized to make the list more useful for both archivists and history faculty seeking to incorporate the competencies into their teaching and learning activities. A full list of the competencies follows.

Undergraduate history majors with archival literacy competencies can

Accurately conceive of primary sources.

1. Define and articulate differences between primary, secondary, and tertiary sources.
2. List common types of primary sources used in conducting historical research.
3. Articulate the value of primary sources to historical research, communicating a real or imaginary example illustrating value. Explain why historians are expected to use primary sources in their research and scholarship.

Locate primary sources.

4. Distinguish between types of repositories that collect primary sources, including libraries, archives, museums, and special collections.
5. Name some of the wide variety of types of archival repositories, using adjectives that refer to various spheres of organized activity, such as *business*.
6. Give examples of some kinds of materials held in different types of archival repositories, such as religious archives, business archives, university archives, government archives, etc.
7. Locate and effectively use the websites created by archival repositories and special collections libraries including reviewing finding aids, hours, and policies prior to visit.
8. Locate particular special collections and archival repositories in a given geographic proximity, including capabilities for obtaining copies of documents without travel, and search effectively for primary sources within these existing archives and special collections in the community, state, region, and country.
9. Identify and effectively use (search) the major bibliographic databases for locating primary sources.
10. Describe how to locate and use archival finding aids.
11. Explain the lack of online access to many archival materials.

Use a research question, evidence, and argumentation to advance a thesis.

12. Formulate and develop a research question to be answered using primary sources.

13. Accumulate multiple primary sources, as well as secondary resources, to build or support a case for a research thesis or argument.
14. Evaluate and synthesize information and arguments from both primary and secondary sources for evidence.
15. Construct an argument using primary source materials.
16. Explain the constructed nature of history, some possible reasons for gaps in the historical record that might result from war and other circumstances, and how to identify promising and possible alternative search strategies for the information one is seeking.
17. Recognize historical styles of handwriting and outmoded printed scripts or fonts. Read manuscripts and books that are written or printed in these.
18. Interpret and analyze both print and electronic primary sources. Include: description of the features and vulnerabilities of the physical object, means for evaluating authenticity including provenance, methods for historical contextualization, indications of the purpose and intended audience, and observations that may be used to identify bias.
19. Interpret a variety of types of primary sources to glean information from them. Critically analyze and write in a critically informed way about a variety of types of sources used in historical research, such as institutional records, rare books, photographs, charts and maps, manuscripts and personal papers, ephemera, born-digital materials, 3-dimensional artifacts, audiovisual materials, and oral history interviews.
20. Articulate common biases in primary and secondary sources to be aware of in assessing their trustworthiness.
21. Describe tactics for gaining access to multiple perspectives and narratives.

Obtain guidance from archivists.

22. Explain the role and potential value of the research consultation with archives staff.
23. Communicate a variety of information needs effectively to archivists, both orally and in writing.

Demonstrate acculturation to archives.

24. Define common terms used by archivists and historians in conducting research, such as “repository,” “finding aid,” “manuscript,” “provenance,” “IRB,” etc.

25. Describe the differences between archival records, personal papers and manuscripts, and rare books.
26. Communicate a rationale that justifies security and preservation measures taken by archival repositories.
27. Find the requirements for researchers' use of a specific archival repository.
28. Describe common policies and protocols for archival repositories, including the researcher registration process, the kinds of materials that are commonly not allowed into the repository, and processes for duplication.
29. Describe the care and handling processes for using original physical materials. Explain both why these processes are necessary and why they are important.
30. Articulate the ways in which experiencing and handling original primary sources differ from use of digital or other facsimiles.

Follow publication protocols.

31. Explain the differences in copyright for published and unpublished sources.
32. Describe how one can legally and ethically incorporate unpublished sources into one's work.
33. Take effective notes on unpublished materials to capture full citation information for the materials in a paper.
34. Cite different types of unpublished primary sources such as documents, photographs, and artifacts, using more than one style of citation.
35. Describe how to obtain permission from the archival repository or library to quote from, reproduce, and/or reuse the collections in a paper or other type of publishable work.
36. Specify some common restrictions placed on unpublished materials and justify such restrictions by giving the legal and ethical reasons for them.

Have advanced skills.

37. Explain how to locate special collections and archival repositories internationally.
38. Describe some ways that archival materials are collected and processed by archivists, as well as the primary archival theory and practices that guide this work (provenance, original order, etc.).
39. Recognize common preservation, organization, and archival processing techniques to distinguish the way materials have been altered since being acquired by a repository. Distinguish between

the work an archivist may do to make a collection accessible and to preserve it versus the work an author, creator, or collector might do, and give some instances of when to avoid drawing false conclusions based on appearance of the items.

40. Give examples of factors that might influence the order in which materials are organized in an archival repository.
41. Describe effective techniques for conducting oral history interviews so that the interviews can be reused in a publication or scholarly work.
42. Describe common requirements for creating, storing, and publishing oral histories (IRB certification for conducting human subjects research).
43. Use materials from multiple archival repositories or special collections libraries.
44. Describe some ways in which archival repositories function in other countries and how access to primary sources may differ in those countries.
45. Communicate effectively about one's research experience orally, visually, and in writing.
46. List various ways in which collections in archival repositories and special collections grow over time and how materials that may not have been available on initial visits to archives may become available in the future.
47. Produce a scholarly work that incorporates primary and secondary sources as evidence and is suitable for publication, both in writing and in a formal oral/visual presentation or demonstration.
48. Articulate issues relating to the historical memory of society that are relevant to archival research.
49. Plan all aspects of an archival visit that requires travel and advance accommodations including researching available travel grants.
50. Describe some of the reasons a history major might consider a future career in the archives profession.
51. Interpret and analyze both print and electronic primary sources. Include description of the features and vulnerabilities of the physical object, means for evaluating authenticity including provenance, methods for historical contextualization, indications of the purpose and intended audience, and observations that may be used to identify bias.²⁹

Discussion

The applied research method used for this study resulted in the development of a credible list of archival literacy competencies undergraduate history majors should possess by the time they graduate. Expert opinion and different stakeholder groups, including history faculty, history alumni, an archivist, a History Department liaison librarian, and an information literacy expert contributed to the document. The interviews were particularly rich in validating the original draft list of competencies compiled by the archivist as well as contributing additional competencies. The interviews gave the faculty the opportunity to reflect on how they learned to find and use archives. This helped them understand what their students experience and how defining core archival competencies will be helpful in curriculum planning.

Although the review of course syllabi confirmed that history faculty members expect their students to become familiar with how to use archives and other primary sources, this stage of the study was not as fruitful as we had hoped it would be, for several reasons:

- Lack of consistency among syllabi: they did not all include course objectives or assignments.
- Course objectives, when present, were not always clearly stated.
- The syllabi did not always list additional recommended or required readings beyond the required textbooks, making it impossible to determine whether they included primary source materials. Other studies of faculty syllabi indicate that they infrequently include supplemental readings.³⁰
- It was not always possible to determine whether the assigned readings constituted primary sources without examining them; in many cases only author names, or partial titles, were provided.
- The syllabi for 31.5% of the courses offered that semester were not available online.

Faculty in the Department of History at Purdue University agreed that the list of archival competencies developed through the project were appropriate for history majors. However, further research is needed to incorporate perspectives from history faculty nationally and at different types of higher education institutions, as well as perspectives from archivists and academic librarians, to ensure that the findings are applicable to history courses taught at a variety of institutions. We are currently working on the next phase of the study, involving history faculty, librarians, and archivists at colleges and universities across the United States.

Recommendations

The following recommendations for archivists resulted from this project:

Increase collaboration among history faculty, archivists, and librarians. Partnerships among disciplinary faculty, archivists, and academic librarians will ensure that history majors receive training in the archival research skills they need prior to graduation. To reach all history majors successfully, this training needs to be progressively integrated into required courses in the academic program. The recent Ithaka report on the changing research practices of historians confirms the need for archivists to take more active roles in helping historians interpret collections and instruct students in using archives.³¹

Contextualize archival literacy in history courses. Only a high-level course devoted explicitly to archival research skills could integrate all of the archival literacy competencies. Select archival literacy competencies, however, could easily be incorporated as learning outcomes in a course syllabus. The competencies are intended to complement a professor's existing course goals and objectives, and to be integrated seamlessly into existing classes with minimal effort. This can be achieved by adding one or more assignments using archival materials, incorporating lectures or class discussions and problem solving with an archivist or seasoned archival researcher, and/or assigning readings focusing on archival research methods.

Develop online archival research tutorials that are institution-agnostic. As Beth Yakel's research has shown, the proliferation of online finding aids and digitized collections increases the importance of students' ability to evaluate the materials they find, assess the reliability of a source, interpret a finding aid, and place a source in context, since an archivist may not be available for real-time assistance.³² With in-class time limited, many archival literacy competencies can be introduced or reinforced with online archival research tutorials; however, it is important that these tutorials teach students how to apply the skills they learn in other archival repositories in the future. This means placing less emphasis on a repository's particular holdings and more emphasis on the research strategies students will need throughout their future careers.

Assess instruction and students' mastery of archival competencies. Research on teaching with primary sources emphasizes the need for more assessment of instruction.³³ Magia G. Krause found that the majority of archives and special collections repositories rarely or never conduct formal assessment of their instructional efforts.³⁴ Krause, Zhou, Duff, and Cherry have made strides in experimenting with approaches to evaluating student learning, but more work is needed in this area.³⁵

Provide training to archivists in pedagogical methods. The lack of training available to students on archival research and the need to incorporate

critical thinking skills into the use of primary sources underscore the need for archivists' involvement in teaching.³⁶ However, few opportunities exist for archivists to receive formal training in pedagogical methods within the archives profession. Professional organizations such as the Society of American Archivists, the Association of College and Research Libraries, and the American Historical Association need to work together to provide convenient and affordable training designed for archivists in educational theory and effective teaching methods.

Develop practical guidelines on how to teach archival research skills. Buehl, Chute, and Fields have pointed out the dearth of guidelines and best practices available to archivists on how to create lesson plans and learning activities on archival research.³⁷ The need for these guidelines will continue to grow with the increasing emphasis on using primary sources, and more archivists collaborate with teaching faculty to create or transform courses by incorporating archival research.

Develop archival literacy competencies for other disciplines. Although historians may have traditionally represented the majority of archival researchers, a growing number of other disciplines use archival materials. These include English literature scholars, researchers specializing in rhetoric and composition studies, as well as visual and performing arts and communication scholars. Although the archival literacy competencies included here were developed specifically for the history discipline, many of them may be applicable to other disciplines. Further research is needed to identify whether disciplines outside of history require subject-specific archival research skills.

Conclusion

Undergraduate history majors are expected to understand and use primary sources. College and university archives hold innumerable original archival sources, offering students easy access to the sources themselves and the opportunity to experience the archival research process as a professional historian does. Yet, because procedures for using archives and methods for conducting archival research differ from traditional library research, students need specific instruction to acquire the knowledge, skills, and abilities to become proficient archival researchers. Both the history and archives literature show that students do not receive the instruction they need in finding and using archives. To bridge this gap, archival literacy research competencies need to be identified to provide a starting point for archivists, librarians, and history faculty in meeting students' needs in learning how to use archives.

This article described the first phase of a research project to identify archival literacy competencies for undergraduate history majors. The principal investigators included an archivist, a librarian with liaison responsibilities to a

history department, and an information literacy expert. The faculty of a history department provided information critical to the success of the project through interviews and responses to requests for feedback. We have been continually mindful of the relevance of this study to the professors' teaching, as well as of the potential for implementing these competencies in information literacy sessions conducted by archivists.

Acknowledging that use of archival materials and working with archivists are essential to developing these research competencies in students of history, we encourage stronger collaborations between archivists and historians to address this gap in training. History faculty, archivists, information literacy instructors, and curriculum planners in colleges and universities can use the list of archival literacy competencies to incorporate systematic training in them as an integrated part of the academic program. Because no other list of archival research competencies exists for historians, the results of this study will be of interest to any archivist, academic librarian, or professor wishing to improve history students' success in using archival materials. Additional research is needed to collect feedback on the competencies from more and different types of higher education institutions. We are addressing this need in the second phase of our study, currently underway, which includes a broad sample of history faculty, archivists, and librarians in the United States.

The competencies are intended to serve as a starting point for archivists in partnering with teaching faculty to develop learning outcomes and content for instruction sessions. This full range of competencies can be utilized by history faculty, archivists, and librarians. Archivists will also find the competencies useful in discussing with teaching faculty the specific concepts the archivist can cover, and ultimately the value they could bring, to teaching students archival research skills. Perhaps most important, professional organizations such as the Society of American Archivists, the Association of College and Research Libraries, and the American Historical Association can use the competencies as a starting point for crafting nationally recognized standards for archival literacy instruction.

Appendix 1—Interview Questions for Department of History Faculty

1. What do you expect undergraduate history students to know about finding and using archival resources by the time they graduate?
2. What do you wish you had learned about finding and using archival resources when you were an undergraduate?
3. What do you think graduate students in history should know about finding and using archival resources?
4. We would like to conduct our study with history faculty at several other universities. Which ones have comparable history departments to yours? (in terms of size, subject focus, ranking)
5. Do you have any additional comments about history students and finding and using archival resources?

Appendix 2—Faculty Interview Comments

Question 1: What do you expect undergraduate history students to know about finding and using archival resources by the time they graduate?

- I would like them [undergraduate history students] to realize that not everything is online . . . in order for them to understand that I guess they have to know what are in archives.
- It is important to appreciate the possibilities that are in archives and then at the same time they [students] need to know the limitations.
- The constraints put upon archivists in terms of what is made available to the public and what is deposited or not deposited would be helpful for students to understand the whole archival process.
- I would like them [students] to have the practice of going into an archives with some idea of what they need to fulfill an assignment and then having them go through the whole process so they understand searching methods, how archivists can help them, the serendipity of surprise discoveries, the frustration when you don't find what you think you want to find.
- I think they should have some experience not only with primary sources, which as we know can be print reproductions, but with actual things themselves. . . . I think just encountering the original thing is crucial for undergraduates. For any undergraduate to complete a history major now . . . there is just no reason for them not to have some encounter with the thing itself [in the archives]. One reason that I am so committed to having them look at the original thing itself is that it's too easy to believe that somewhere there is a full accounting of what really happened. When you have to make sense of something that is original, it's not neat, it's not the whole story, but rather a piece of the story. Then students come to realize the constructive nature of history. That's why it is an art . . . we are in fact trying to make a sense of the past honestly and . . . objectively.
- My first sort of magical moment [as a student] happened when a professor in my freshman year projected an image of an auction bill. Everything just changed for me at that moment because I thought, "Okay, this is for real. Slavery is not an abstraction. People were selling other people and here is something from the past that tells us that really happened."
- Having some form of the real thing is better than a typed script because you always have that sense that somebody else has mediated it . . . when you actually hold a piece of paper in your hand or you stand in front of an actual original canvas—that is just alchemy. There

is just something magical about putting your life in relation to people who lived maybe hundreds . . . thousands of years before . . . the direct contact between you and that object for historians is really important that they learn that experience so they can convey to others that we still have a lot to learn from people who are long gone.

- Our upper division research courses should have a component that forces the students . . . to make use of this archives.
- Something really amazing happens when you send students on what they think is going to be an easy task [to find information]. . . . It forces the student who really wants to do a good job to come to the archives . . . then that means going to another set of research questions. . . . It is jumping into the thing itself that leads to the most interesting insights by students. [You] just spark their curiosity and their detective instincts and there is nothing better than that, than sending them to original materials and saying “What do you make of this?” Just asking two or three simple direct questions and they are like “Yeah, I guess I don’t really get that” and then that becomes a researchable moment. So, I think that is indispensable for flipping that switch that distinguishes the okay history student from the one that is potentially a really good researcher, and archives are a key.
- In an ideal world, I would expect our [history] majors to have been able through their coursework—we have a minimum of two required research seminars for our majors . . . where students get for the first time indoctrinated with the challenges and pleasures of doing historical research. . . . So that would be an opportunity for them to conduct research, some kind of a research project [using archives]. . . . Just learn how to use an archives. It would be great if we could build into that a requirement that they use the resources here [in the university archives]. . . . I could offer . . . a kind of orientation for undergraduates . . . so they would know how to go about finding and using archival resources easily accessible to them here on campus.
- A key competency for history majors is to understand the difference between a primary source and a secondary source. So one challenge is just teaching them what are primary sources.
- When we have them in these research seminars, when we say come up with a topic, they come up with a topic. And then we say, well, go forth and go find sources and report back to me. And they don’t have a clue. They don’t even know how to use, how to find original sources . . . in the collections. And they certainly don’t know how to use the Internet, because there is so much digitized.

- [They should know] source materials are located here [on campus] as well as the materials that would be located . . . on the Internet.
- The idea of [requiring history majors to use the archives would be] a cool thing. Thinking maybe they want to go on and get their master's in library science, and maybe become an archivist themselves, because we're always talking about career paths, what you can do with a history degree.
- Maybe there [could] be a way for us . . . all of us who are doing History 395 [required research seminar for undergraduate history majors] to make sure that during one of those class periods, make it an archives experience day. We could come up with a 50-minute teaching module where they would come here, have exactly that experience of signing in, we would explain to them why you do that, and show them what a manuscript box looks like, pull out some documents, maybe organized around a topic, sort of close to if not right on what they are studying in 395. . . . That's something we could do together, we could initiate some kind of discussion like that, an appeal to my colleagues to try harder to do that.

Question 2: What do you wish you had learned about finding and using archival resources when you were an undergraduate?

- I knew nothing [about archives] as an undergraduate. I learned it all in graduate school on the spot. . . . [It] would have been helpful . . . [to know] what kinds of things a particular archives might have and how to go about finding anything in archives. Learning how to use indexes, learning how to rely upon the expertise of archivists.
- Learning how to read handwriting from previous centuries . . . it took me a long time to learn about the different German scripts from before the twentieth century.
- Through the many different kinds of archives there are I realize that artifacts . . . [when I was a student] nobody ever told me about artifacts.
- In one course . . . [we as undergraduates had] to identify the original materials you would use to make your case. . . . I actually was able to make use of archival materials and got a little bit of the experience of who is in charge of archives. . . . I had to make a special appointment and before I was allowed in the room I was told the terms like I could only use a pencil, I could provide my own paper but they wanted to look at everything before I left so they could make sure I wasn't carrying anything away, and the hours were limited. So it was unlike other kinds of research. . . . They had some collections that the donors had placed restrictions on so that nobody could see them for twenty-five

years . . . and I would have loved to get my hands on them . . . so, recognizing that just because it is extant doesn't mean it is accessible was a real important lesson.

- I kind of wished that I had been able to go to multiple archives . . . but they were far away. . . . When you have the freedom to visit wherever the materials take you it is actually a richer and fuller experience.
- As an undergrad . . . I got great training . . . we had research seminars, we were required to go to the college archives and to use materials there to write papers . . . in a sense our hands were held and we were walked through all of that. I was in a great place, at a great time, to have that kind of training. By the time I got to graduate school . . . they took us to the [archives] and they showed us how to do this . . . how to use the card catalog, and here is a manuscript box, and here are the sources in a manuscript box. And here is how you take notes. It's down to that level, that holding of hands, and showing of what do we mean when we say a manuscript box? That's what you need, that kind of guidance . . . to give the student the kind of confidence to go forth and then do it themselves. They need that, because it's so different than telling a student okay, go to the library. It's very different to tell them, there is this manuscript collection out there, go use it. It's incredibly intimidating, it's a very scary process [for the student]. So you do have to do that hand holding, I think, to give them that kind of experience.
- Part of the challenge is for us [faculty] to get off our butts and think about assignments that will have our students come here [to the archives].

Question 3: What do you think graduate students in history should know about finding and using archival resources?

- Well, really the same things [as undergraduates]. Of course, they should be at a higher level.
- Graduate students should be able to know what they can get online because I think just about every archives has a website so they need to understand what kind of information they can get online, how to communicate with archivists and ask questions through e-mail.
- Find out what the requirements for use [of the archives] are, find out what kind of identification they need, what kind of letter of recommendation they need because not all archives are completely open to the public.
- There are a lot of gaps in archives for a whole variety of reasons . . . there was wartime destruction. . . . I think it would be useful for them to somehow come to appreciate some alternative strategies, when

they don't find what they think they must find, what other possible archives might fill in a gap. There are other ways to get at material that may not be available in an archives.

- All the things involved in archival research that you might not anticipate . . . not being able to read the handwriting . . . [or] the fact that the picture [of the interior of an archives] was completely illegal because they didn't allow cameras in there.
- Archivists know what's there and a user may not know everything that is in an archives. But, by talking with the archivist, the archivist can often open up possibilities that a user hadn't thought of and being open to that I think is really important.
- Things change and you need to almost, not quite reinvent the wheel, [but] go to each new place and find out how they are functioning and what they have. I mean even if you have gone some place and . . . you realize, "Oh, they got additional materials since the last time I was there" and how would you know that if you weren't able to just go and ask?
- They should have spent time in more than one archives.
- I don't care what field a student is in, I don't think there is an excuse to not make use of the university archives wherever they are located. If nothing else, just to get used to looking at, learning how to handle respectfully original materials, recognizing that there are protocols. Sometimes you don't know what to expect when you make your first visit to the archives unless you've had that first experience where someone says, "No, you are going to have to turn in a piece of identification . . . and no you may not bring in your book bag and no you may not have your Sharpie."
- Students should have the experience of knowing how precious these materials are and that they should be expected to be watched. That came as kind of a shock the first time I went to the archives.
- I'm not sure how good of a job we do in the History Department . . . in introducing students how to locate archives. . . . We should probably be doing more in research seminars to guide them to these databases for locating archives.
- I'd hover more with my undergraduate students. But graduate students, I would expect, after [an] initial show-and-tell and teaching them about [finding and using archives], I expect them to take the initiative and to be assiduous in their efforts to find and use archival sources and be ambitious in doing that. . . . I want to see how well they did given that imperative . . . to find materials, do your research, and produce a piece of scholarship with an eye on submitting for publication.

- At some point it becomes important to look at the originals, because there is something I think really different about holding the letter. Oh my God. Part of that is just scratching that itch that we have. When you become a historian you want to hold the original, you want to look at the original things. It's like a spiritual thing. Sometimes it becomes part of the research process, because you want to see if there are things [like] annotations. Even typescripts . . . things like transcripts of meetings where . . . somebody sat there and typed up—using the machine . . . and somebody must have looked at it and edited it in some fashion or made comments on it and . . . probably used different color ink . . . and then you discover that a page had been retyped . . . and those things all have meaning if you're studying the making of policy and the way in which people have edited or come to different decisions about [things]. . . . It's so expensive to travel, I don't think there is anything wrong with relying on using digitized material if it's available, but at some point it becomes important to study the originals. . . . You could even do a little training lesson showing the difference between an original source as opposed to the digitized.

Appendix 3—Responses to Request for Final Review of Competencies

Faculty Responses

1. Wow, this is a very comprehensive list of archival competencies. I wish I could implement it in my courses. Since it is intended for undergraduate history majors, I understand that it is focused primarily on the U.S., though you do include the possibility of archives in other countries. I was pleased with HIST 395's archives experience, and I expect to do something similar in the future. However, I do not expect that students could fulfill the many excellent competencies you list. Thank you. This is very helpful and inspiring.
2. I really think this looks like an excellent list. I can't think of anything to add.
3. The list that you put together is excellent in all respects. I have just one very small suggestion for the next version. On page 1 Locate primary sources, at point three, you might add government archives to the sample list of types of archives. You've done a terrific job!

Alumni Feedback

1. That list is pretty thorough, though I did note a few things that might need clarification/expansion and one or two items that you may have missed. I like that you mention the thorny issues surrounding societal/individual memory and how that influences historical analysis. Any competent historian, even if they do not work specifically with memory, needs a basic understanding of it and the recent scholarship on how it works and how it influences our work.

You might want to mention also that archival researchers need to be very careful in discovering and assessing the chronological and spatial relationship of a particular document to the events it describes. Is this someone's diary entry, written down the day of the event, or a summary letter, written a week later, an official report, summarizing the event, or reminiscences or a memoir, looking back on an event? That will influence the interpretation of the source and its reliability and/or usage as a source. Make sure to stress the importance of developing information literacy in regards to the internet. More and more primary sources are available online, but sometimes it is difficult to establish provenance. There are also good secondary materials online, but, again, provenance is important.

It might not hurt to address not only learning how to cite properly within different citation systems, but also how to deal with common citation problems. Students should be able to identify potential pitfalls

(forgetting to write down the date of a document, authorship, failing to clarify between direct quotations and summations of material, etc.) and articulate their specific plans to avoid these problems. More and more archives allow digital cameras, vastly expanding a researcher's ability to examine documents. Instead of being able to access only those items that you can read within your time at the archives, you can take photos and read through them later. However, students need to be aware of archival policies regarding the use of digital cameras and proper techniques in taking them (so you do not end up with a shoddy image after you get home).

You mention learning how to use finding aids. Perhaps add a note on learning how to access finding aids ahead of time online in order to plan one's visit and make best use of the time. Sometimes you simply cannot get to an archives, yet you still might be able to order a copy or digital image of a document. Students should be aware of archival policies regarding this. Establish or clarify standards regarding appropriate and effective note-taking, including copying down all relevant information for citation, learning how and when to quote directly, how to summarize or paraphrase (preserving clarity without getting too verbose, which wastes time).

Along with my note on finding aids, stress the importance of planning all aspects of an archival visit. Archives may have odd hours (due to budget cuts, the nature of the archives, location, etc.), there may be parking difficulties, a university archives may have fewer hours in the summertime, you may have to stay a distance away and allow for commuting time each day, etc. Do not forget to research lodging, food, the layout of the town, public transportation, etc. Also, if you are planning a trip which will include visits to multiple archives, take note of their geographical relationship to each other, the amount of total time you have available, the hours of each archives, and your finances.

Proper planning saves time and helps you to get the most out of your money and effort. Archival researchers should know how to learn about and apply for travel/research grants. Sometimes one's department/school has money set aside for this, some archives have funding for this that many people do not know about so it sits there unused, or there might be a third-party source. I hope these suggested additions/revisions help. Please forgive my verbosity.

2. [Name omitted] reminded me of something else. Researchers need to find out an archives' policies regarding access to documents. For example, at the National Archives, you need to find out the file information for the items you need, fill out a form for each item, and drop it in a

box. They only pull documents at set times during the day, so you need to get your request in sufficiently ahead of time to get it pulled at the right time. Also, you can view a maximum of twenty documents in a given day. You can only check out a certain number at any one time. Researchers need to know about these types of policies in order to make best use of their time and in order to maintain cordial relationships with archivists (essential to one's success!).

3. I have looked over the list several times. I am attuned to finding something to correct or to suggest revision. In this list, however, I can find none. I found the list thoughtful. It appreciates the growth in understanding and research proficiency that an undergraduate experiences during her or his academic tenure. As I read the objectives, I thought of my own students. The objectives seemed to mirror a normal progression of undergraduate history students through the freshman and senior years. I hope this assessment is helpful. If I could have suggested revisions beyond minor word changes, I would have.

NOTES

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- ⁴ Margaret Stieg Dalton and Laurie Chamigo, "Historians and Their Information Sources," *College and Research Libraries* 65 (2004): 405.
- ⁵ Doris J. Malkmus, "Primary Source Research and the Undergraduate: A Transforming Landscape," *Journal of Archival Organization* 6, nos. 1–2 (2008): 48.
- ⁶ Samuel J. Redman, *Historical Research in Archives: A Practical Guide* (Washington, D.C.: American Historical Association 2013), 5.
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- ¹⁷ Joint Committee, *Historians and Archivists*, 31.
- ¹⁸ Joint Committee, *Historians and Archivists*, 38.
- ¹⁹ Elizabeth Yakel and Deborah A. Torres, "AI: Archival Intelligence and User Expertise," *The American Archivist* 66, no. 1 (2003): 52.
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- ²³ Carini, "Archivists as Educators," 47–48.
- ²⁴ Dalton and Chamigo, "Historians and Their Information Sources," 400–25.
- ²⁵ "Data Digest 2012–13 West Lafayette" (West Lafayette, Ind.: Purdue University, 2013), http://www.purdue.edu/datadigest/2012-13/PDF/Data_Digest_2012-13.
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- ²⁷ Purdue University, "Department of History" (September 11, 2013), <http://www.cla.purdue.edu/history/>.

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- ²⁹ Interestingly, although the archives literature promotes this type of competency, such as document analysis, as an important entry-level archival competency for undergraduates, and in some instances for K–12 learners, several historians and librarians surveyed responded that they viewed it as an advanced skill. The authors do not necessarily agree that this competency is an advanced skill. The survey responses could indicate lack of familiarity on the parts of history faculty and librarians in effective methods of teaching this type of analysis to students, emphasizing the benefits of further involvement by archivists in the teaching process.
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- ³⁶ Joint Committee, *Historians and Archivists*, 38; Robyns, "The Archivist as Educator," 364.
- ³⁷ Buehl et al., "Training in the Archives," 299–302. One recent and noteworthy exception is the excellent TeachArchives.org online resource available from the Brooklyn Historical Society. <http://www.teacharchives.org/>

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