

PRIMARY SOURCE PIVOTING:

How Faculty Adapted Primary Source Instruction During the Pandemic and What is Here to Stay

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BACKGROUND

Like many institutions of higher learning across the country, Texas A&M University, the University of Miami, Washington and Lee University, and Williams College shifted to remote or hybrid teaching during the 2020-2021 academic year and into the 2021-2022 year. Prior to the pandemic, these four institutions took part in a multi-institutional study organized by Ithaka S&R with the goal of learning how best to support faculty and instructors with their use of primary sources in undergraduate teaching. Small teams from these four institutions conducted interviews with approximately fifteen instructors of undergraduates from each institution, predominantly from the humanities, asking them a series of structured questions about how they learned to teach, how they found and organized primary sources, why they taught with primary sources, and what their pedagogical goals were by incorporating primary sources into their classroom. The findings of this research, along with the list of questions, can be found in each institution’s report.² But one extraordinary aspect of the study that no one could have deliberately designed was its timing. These interviews created a perfect “before time” snapshot and painted a rich picture of how undergraduate humanities faculty were using primary sources in their physical classrooms prior to the pandemic.

METHODOLOGY

Researchers from each of these four teams wanted to continue to explore the data beyond the original research questions posed by Ithaka S+R. Kevin M. O’Sullivan, then Curator of Rare Books and Manuscripts at the Texas A&M University Libraries,³ Christina Larson, then Mellon Fellow in Academic Engagement at the University of Miami Libraries and Lowe Art Museum,⁴ Anne Peale, the Chapin Librarian at Williams College, and Paula S. Kiser, the Digital Scholarship Librarian at W&L, decided to work together to see what, if any, patterns emerged when they combined the data of their four institutions. These four schools represent a wide range of institutions and approaches to undergraduate education. Both Texas A&M and the University of Miami are large R1 universities with PhD programs. Texas A&M, a public university, has over 53,000 undergraduate students and the University of Miami, a private institution, has over 18,000 undergraduates. In contrast, Williams College and W&L are both small private liberal

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arts colleges with around 2,000 undergraduates each.⁵ The sample sizes from each institution were too small to allow for any statistically relevant comparison between the two types of schools. Despite this limitation, strong patterns transcending institution type emerged in the responses from faculty instructors across all four institutions.

When we began this subsequent research, we re-coded our original interviews to look more granularly at how faculty learned to teach, their pedagogical approaches to using primary sources in their teaching, and their desired student learning outcomes from the use of primary sources in their courses. We were interested in learning if there were any connections between the responses in these three areas. Just as we were starting to analyze our newly coded data, though, the pandemic forced all of our institutions to move to emergency remote teaching. As instructors adapted to teaching remotely, our faculty and staff in libraries, archives, and museums also adapted to support remote teaching and remote students. The instructors who had shared their love of physical items with students were forced to use digitized primary sources and to experiment with new ways of using primary sources in virtual environments. Libraries, archives, and museums shifted their educational outreach to online platforms and supported these new methods of instruction.

While teaching online is not new in higher education, it was a new practice for many of our interviewees, one that was not of their choosing. Our initial goal of more deeply analyzing the original interview responses no longer seemed relevant. What we realized, though, was that we had a unique snapshot of what primary source instruction looked like just before the onset of the pandemic. What if we went back to our interviewees with additional questions: Had their pedagogical goals changed? How had their teaching methods changed? Did any of those involuntary changes end up working better than they had expected? Which of these new approaches might they retain after a return to in-person teaching? We decided to reach out again to the same faculty members we had interviewed in the initial study with a new series of questions. Their answers showed what faculty were doing in the short term: on the whole, stopgap measures until they could return to their regular methods. But they also demonstrated that some of the changes faculty made during the pandemic worked out better than expected, and that faculty planned to continue to use these new approaches and methods even after returning to the classroom.

RESULTS

The responses to the 2021 interviews showed what aspects of teaching with primary sources remained the same, what areas changed, and—most importantly—what new practices the instructors planned to retain after the need for virtual teaching was over. Four themes emerged from the data from both sets of interviews: 1) how faculty cultivated pedagogical practice; 2) how they developed practical approaches to teaching with primary sources; 3) their goals for student learning outcomes; and 4) affective responses to both primary sources and to teaching during the pandemic. A full analysis of our findings will be published in the May 2024 issue of *Colleges & Research Libraries*.⁶ However, the research raised questions about the future of teaching with primary sources that we had limited time and space to discuss in our article. This paper focuses on the changes that have proven to be of lasting value and considers what libraries, archives, and museums need to do to support these new approaches.

DISCUSSION

Adapted Approaches to Teaching with Primary Sources

Three years on from the spring of 2020, our faculty and institutions are settling into new patterns of working and teaching. For some, this may feel like a return to patterns established well before the pandemic, but some tools and practices adopted during the acute phase of emergency remote teaching have become a durable part of our work. We identified key practices that will require ongoing support from libraries, archives, and museums staff.

Teaching How They Were Taught

The faculty we interviewed overwhelmingly taught their students using pedagogical practices they had encountered during their own education. The instructors learned by example, watching mentors, or by reaching out to

colleagues informally. The latter method proved more useful during the pandemic, as instructors who had never planned to teach online had no other option. Likewise, those faculty who were comfortable experimenting and trying new things as shown by their trial-and-error method of learning how to teach were familiar with how to “wing it” and see how it all panned out. Moving forward, if this method of graduate student learning how to teach continues, then the pandemic has ushered in a new era of examples of how to teach.

In 2019, 6 million undergraduates chose to take at least one distance course. That number jumped 97% in 2020, with 11.8 million students taking at least one distance course—in most cases, not by choice.⁷ The increase in students taking online courses was not as drastic for post-baccalaureate students, although the number who took at least one distance course did increase at both public and private non-profit universities.⁸ The next generation of faculty will all have firsthand experience as students in virtual and hybrid classrooms, something uncommon among their predecessors, and these experiences with digital learning environments will likely influence their teaching.

Class Preparation and Assignment Design

Despite their past experiences with primary source research and instruction, many faculty members described how a shift from physical to digital primary sources involved extra labor and planning—well beyond what they had experienced for in-person instruction before the pandemic. The changes faculty made to tools and practices during the pandemic were prompted not by a desire for progress, but a desperate need to adapt to a new and rapidly evolving pedagogical environment. While library, archive, and museum staff assisted in digitization and access to information about objects, faculty often had to learn the nuts and bolts of audiovisual resources as well as sharing them digitally with their students.

A few faculty in our study canceled their plans for teaching with primary sources. These were mostly from History and Art History, where material culture and physical objects are core to those fields of study. Of the 26 interviews that we conducted, most described how they adapted their plans with primary sources to the constraints of the COVID-19 pandemic in a fully digital environment. Some relayed their innovations and major changes with lessons, but many faculty described how they adapted their existing plans. Faculty who invested a significant amount of time to implement these adaptations should be able to conduct similar classes in the future without so much initial effort. Much like designing a new class, the initial creation phase requires a significant amount of planning, but future improvements should be minor tweaks of the original class, not a complete overhaul. However, faculty may be interested in updating other classes or preparing for a hybrid model when they create new courses.

Access to Expertise

Our interviewees reported that they regularly invited online guests to their classes, including authors, artists, scholars, and colleagues who oversee primary source collections. While not historically the domain of library, archives, and museum staff, we anticipate that support for hybrid teaching and virtual guest speakers will be a regular necessity in our spaces. Virtual guests provide a more diverse range of expertise than on-site faculty and staff, and hybrid classrooms are becoming a regular offering at many institutions. However, institutions must provide training, staff time, and equipment to support these needs. They also need to plan for management of the data generated during virtual events: will talks be live streamed or recorded? How will the recordings be stored and made accessible? Will there be a transcription or other accessibility provisions, and will the transcription be reviewed by a human?

Digital and Digitized Primary Sources

We also observed that faculty tend to teach with sources they already know well. Unless prompted by an exceptional event like the pandemic, they may not prioritize the introduction of new primary sources into their established curriculum. One faculty member explained: “all of those things I didn’t know existed before became

far more urgent... to figure out [how to] access.” When they default to mainstream databases, faculty decrease the diversity of sources their students encounter.

One of the simplest shifts was the incorporation of digitized primary sources—either using digital facsimiles of the originals or sharing digital textual copies. How faculty employed the digital surrogate or text depended on how essential the physical nature of the source was to the assignment. For instructors more interested in the content of the material, they needed to find the digital text that could be shared with their students—either openly or within a database. But for the items that were meant to stand in for the physical object—especially for items within their own institution’s archives—this required special collections, archives, and museum staff to create or share high-resolution images of the original objects. These requests for digitization of resources may continue as faculty want to maintain their ability to more easily share or inspect the items and libraries, archives, and museums should not plan on scaling back their digitization support services.

Digitization serves a dual purpose, enabling remote access by researchers from beyond campus and facilitating close looking by students and faculty who already have access to physical sources. Digitization is also crucial for accessibility—for students with disabilities, researchers without the ability or resources to travel, and instructors with hybrid courses or high student-to-primary source ratios. As one faculty member commented: “having 16 people look at one digitized document is a lot easier than trying to crowd 16 people around a table.” It is critical to invest in staffing levels, training, equipment, and digital asset management infrastructure to ensure that individual projects remain valuable resources for years to come.

In addition to accessing their own institution’s digital collections with greater frequency, faculty also described sharing online images and materials related to primary sources from around the globe with their students. They may have searched previously for these materials for in-person courses, but the pandemic provided greater urgency for locating and using these resources. In this “sink or swim” situation, faculty learned to swim (or swim better), reporting that digital primary sources (local, national, or global) were easier to access and teach with than they had previously believed.

Digital Tools and Scholarship

Remote teaching encouraged faculty to explore new platforms to access, interpret, and curate primary sources and to promote digital scholarship. The faculty we interviewed specifically cited augmented reality; digital exhibition creation and analyses; ArcGIS StoryMaps; and databases that provide access to digital primary texts and images. Other faculty offered newly expanded options for assessment; instead of a term paper, students were invited to create online presentations or digital projects. One faculty member relayed that this not only offered digital options for final projects, but that the projects themselves accommodated a range of learning styles for students that offered greater pedagogical benefits.

Because faculty tend to teach using methods they encountered as undergraduate and graduate students, most do not make an effort to explore the full range of digital tools available to them. Library, archives, and museums staff should develop familiarity with a select group of tools for digital inspection and presentation of primary sources; consistently demonstrate their benefits to faculty; and make sure that support is available for faculty who want to adopt these tools. Ideally, tools for both collaborative close looking and for formal presentation and exhibition should be included in the supported offerings.

Affective Responses to Primary Sources and Teaching

Those who work with physical collections, whether as researchers, instructors, or information professionals are well-versed in the proverbial “aura of the archive.” And indeed, the professional literature supporting teaching with primary sources is littered with references to the quasi-magical status of engaging with collections materials. While such literature often runs the risk of being overly sentimental about students’ responses to primary source instruction, responses gathered in the course of this study firmly corroborate what may appear at first glance to be “library hyperbole.” Beyond this, however, we would also submit that the affective responses that come from engaging with physical materials have an important role to play in transitioning both students and

instructors to a new, post-pandemic classroom reality—one that draws upon the thoughtfulness of the established community that supports this work as well as a new ethics of care in response to the trauma of these last few years.

As the data from both sets of interviews confirmed, faculty who partner with librarians, archivists, and museum professionals in providing primary source instruction have overwhelmingly positive feelings about the intangible benefits of those experiences. In response to questions asked during the initial phase of this study about why they incorporated primary sources into their classroom, respondents shared many emotional responses (or those of students) to first-hand experience of special collections, using words like “excitement,” “connection,” “sensory,” and “visceral.” The most frequently cited (32 out of 59 interviewees) benefit of engagement with primary sources was an impressionistic, emotional connection with a tangible material object. One professor remarked: “I think it makes it become alive for the student or become more real.” Another faculty member referred to this as “the aura of it, but also the possibility of it.”

Perhaps more surprising, however, were the affective responses of faculty during their follow-up interviews. Sixteen out of 26 faculty voiced emotional responses when asked “How did teaching remotely or to remote students during the pandemic change your approach to using primary source materials in class?” and “How did teaching remotely or to remote students impact your attitude toward physical and digital primary sources? Was there anything that surprised you?” Their responses brought forward a compelling but otherwise concealed trend in the data, speaking in strong terms about their feelings of loss and isolation. Many described the move to remote education using phrases like “soul-crushing,” “withdrawal,” “separation anxiety,” “disappointing,” and “sad.” Moreover, as responses made clear, separation from the physical space and community supporting it was as significant as the loss of access to the collections themselves.

As important as it is to acknowledge shifts in teaching practices that occurred during the pandemic, so too must we recognize the emotional and psychological disturbance experienced by members of our community. According to research conducted by the Student Experience in the Research University (SERU) Consortium, “the prevalence of major depressive disorder among graduate and professional students is two times higher in 2020 compared to 2019 and the prevalence of generalized anxiety disorder is 1.5 times higher than in 2019.”⁹ Similarly, a study on faculty wellness conducted by CourseHero cites that while stress was high at the onset of the pandemic, faculty anxiety actually appears to be increasing as the health crisis continues.¹⁰ Numerous studies have cited evidence pointing to a global mental health crisis following in the wake of the ongoing pandemic, which affects both students and instructors alike. A multi-national study published in the *Journal of Public Health* suggests that this trend is a near-universal phenomenon, indicating a common post-traumatic response among students and faculty around the globe.¹¹

As people adjust to a “new normal” in the wake of the COVID-19 pandemic, it is essential to acknowledge the emotional toll this experience has taken and adopt a trauma-informed instructional practice. In their recent article on instruction during the COVID-19 pandemic, Katherine Nelsen et al., described this as being “focused on decreasing cognitive load and providing students with stability, a sense of agency, and connection.”¹² In the second phase of our study, respondents spoke with hope about their renewed commitment to teaching with physical primary sources, citing the “talismanic quality” of such objects (especially after spending so much time interacting through screens), the ability to learn from objects through multi-sensory engagement, and preserving the personal encounter of connecting with something from the past. Positive emotions and moods have an impact on learning and retention of information, as Liz Chenevey, Psychology Librarian at James Madison University, reminded ACRL attendees in 2021.¹³ Making experiences with primary sources supportive and uplifting can have a positive effect on students’ learning, especially when combined with reflective practices. Classroom instruction that is experiential and hands-on will also help students have more positive experiences than lecture style, show-and-tell sessions, creating increased levels of excitement and leaving them with a greater sense of confidence in their abilities as scholars.¹⁴

Looking forward, librarians, archivists, and museum professionals should seek to reinforce connections to the campus community and empower students with the self-construction of knowledge through personal encounters with collections materials. These experiences offer “a sense of creating community”—an antidote, in other words, for the feelings of isolation and joylessness many expressed regarding online instruction. His-

torically, primary source pedagogy has focused on moving beyond affective responses toward more concrete learning outcomes.¹⁵ In light of both pre- and post-pandemic resources, we recommend that staff take a hybrid approach to outreach and instruction by celebrating the affective benefits of in-person encounters with the material we care for and encouraging faculty to make space in their lesson plans for both emotional and intellectual engagement with primary sources.

CONCLUSION

Instructors will not set aside all of the changes forced into their classrooms by the pandemic. Librarians, archivists, and museum staff should expect that instructors will continue to make increased use of digitized primary sources and assign more digital scholarship projects than they did before the pandemic. To support this shift in pedagogical practice, we strongly recommend fostering robust connections with partners across campus to build a community of practice. As librarians, archivists, and museum staff, we can help faculty discover—and consequently help students encounter—a more diverse set of sources than our faculty were exposed to during their own education. Continuing to help faculty find new collections of digitized primary sources shared by other institutions can help diversify their curriculum and improve the visibility of historically under-represented groups in the curriculum. Libraries, archives, and museums need to continue investing in digitization of their unique collections, with a strong emphasis on making those digitized collections accessible for teaching as well as research use. Both staff and faculty must acknowledge the emotional impact of primary sources, and we must practice compassion toward students, faculty, and colleagues. Advocating for primary source instruction that makes space for affective responses alongside practical outcomes will better align with faculty instructional needs than a purely skilled-based approach. By analyzing the results of interviews conducted with faculty in 2019 and 2021 and sharing our findings, we hope to have helped librarians, archivists, and museum professionals understand what faculty want their students to gain from encounters with primary sources, how their methods of achieving those goals changed during the pandemic, and how we can support faculty teaching as we return to in-person teaching.

NOTES

1. Authorship of this article was shared equally; attribution is thus listed alphabetically.
2. Joel D. Kitchens, Kevin M. O'Sullivan, and Tina Budzise-Weaver, "Teaching with Primary Sources: Report from Texas A&M University for Ithaka S+R," (internal report, Texas A&M University, 2020), <https://hdl.handle.net/1969.1/191016>; Lisa Conathan, Lori DuBois, and Anne Peale, "Teaching with Primary Sources at Williams College: A Summary Report of the Ithaka S+R Teaching with Primary Sources Project," (internal report, Williams College, 2020), https://librarysearch.williams.edu/permalink/01WIL_INST/1htsahc/alma991013796700202786; Christina Larson, Shatha Baydoun, and Roxane V. Pickens, "Supporting Teaching with Primary Sources at the University of Miami," (internal report, University of Miami, 2020), <https://scholarship.miami.edu/esploro/outputs/report/Supporting-Teaching-with-Primary-Sources-at/991031505389302976>; Paula Kiser and Emily Cook, "Teaching with Primary Sources at Washington & Lee University: Humanizing History and Engaging with the Topics of Today," (internal report, Washington & Lee University, 2020), <http://hdl.handle.net/11021/34876>.
3. Kevin is now an Assistant Professor of English at Texas A&M.
4. Christina is now the Assistant Director at the Center for the Humanities at the University of Miami.
5. Williams College had 2,121 undergraduates in 2021; W&L had 1,859.
6. Our analysis of this second round of interviews will be published in the May 2024 issue of *College & Research Libraries* in the article, "From 'Outside the Box' to 'Out the Window': Teaching with Primary Sources through the Pandemic." This conference paper uses that article as a jumping off point to talk more directly to what libraries, special collections, archives, and museums should do to support some of the pandemic-led changes that we will continue to see.
7. National Center for Education Statistics, "Fast Facts: Distance Learning," U.S. Department of Education, Institute of Education Sciences, May 2022, <https://nces.ed.gov/fastfacts/display.asp?id=80>.
8. National Center for Education Statistics, "Postbaccalaureate Enrollment," U.S. Department of Education, Institute of Education Sciences, May 2022, <https://nces.ed.gov/programs/coe/indicator/chb>.
9. Igor Chirikov, Krista M. Soria, Bonnie Horgos, and Daniel Jones-White, "Undergraduate and Graduate Students'

- Mental Health During the COVID-19 Pandemic,” *SERU Consortium Reports* (2020): 1-7, <https://escholarship.org/uc/item/80k5d5hw>.
10. “Faculty Wellness and Careers,” *Course Hero* (November 18, 2020), <https://www.coursehero.com/blog/faculty-wellness-research/>.
 11. Mohammad Nurunnabi, Norah Almusharraf, and Dalal Aldeghaither, “Mental health and well-being during the COVID-19 pandemic in higher education: Evidence from G20 countries,” *Journal of Public Health Research* 9, no.1 (2020): 60-68, <https://doi.org/10.4081%2Fjphr.2020.2010>.
 12. Katherine Nelsen, Kate Peterson, Lacie McMillin, and Kimberly Clarke, “Imperfect and Flexible: Using Trauma-Informed Practice to Guide Instruction,” *portal: Libraries and the Academy* 22, no.1 (2022): 178, doi:10.1353/pla.2022.0003.
 13. Liz Chenevey, “An Emergent Pedagogy of Presence and Care: Addressing Affect in Information Literacy Instruction,” ACRL 2021 Conference Proceedings, <https://www.ala.org/acrl/sites/ala.org.acrl/files/content/conferences/confsand-preconfs/2021/EmergentPedagogy.pdf>.
 14. Chris Marino, “Inquiry-based Archival Instruction: An Exploratory Study of Affective Impact,” *American Archivist* 81, no. 2 (2018), <https://doi.org/10.17723/0360-9081-81.2.483>.
 15. Peter Carini, “Information literacy for archives and special collections: defining outcomes.” *portal: Libraries and the Academy* 16, no. 1 (2016): 191-206, <https://doi.org/10.1353/pla.2016.0006>. Wendy Duff, Elizabeth Yakel, Helen Tibbo, et al., “The Development, Testing, and Evaluation of the Archival Metrics Toolkits,” *The American Archivist* 73, no. 2 (2010): 569-599, <https://doi.org/10.17723/aarc.73.2.00101k28200838k4>. Magia G. Krause, “Undergraduates in the Archives: Using an Assessment Rubric to Measure Learning,” *The American Archivist* 73, no. 2 (2010): 507-34, <https://doi.org/10.17723/aarc.73.2.72176h742v20l115>. Clare Withers, Diana Dill, Jeanann Haas, Kathy Haines, and Berenika Webster. *Library Impact Research Report: A Toolkit for Demonstrating and Measuring Impact of Primary Sources in Teaching and Learning* (Washington, DC: Association of Research Libraries December 9, 2022), <https://doi.org/10.29242/report.pitt2022b>.