

From “Outside the Box” to “Out the Window”: Teaching with Primary Sources through the Pandemic

Paula S. Kiser, Christina Larson, Kevin M. O’Sullivan, and Anne Peale

This study draws upon faculty interviews conducted in 2019 and 2021 to document dramatic shifts in primary source instruction of undergraduate students during the COVID-19 pandemic. Synthesizing these data, it analyzes how faculty cultivated pedagogical practice, developed practical approaches to teaching with primary sources, and adjusted goals for student learning outcomes. The study also identifies lessons that may be learned from the pivot to remote and hybrid instruction, including ways to support new and emerging instruction practices; developing instructor training programs; better showcasing collections of digital primary sources; and adopting a trauma-informed approach to outreach in the years to come.

Introduction¹

The importance of teaching with primary sources is unquestioned in the disciplines of humanities and social sciences. Extolling the virtues of using primary sources with undergraduates to instructors in disciplines like history, English, and art history is preaching to the choir, and the move to virtual teaching due to the onset of the COVID-19 pandemic in 2020 did little to change this attitude. But as much as teaching faculty in the humanities and social sciences agree about primary sources being essential in their teaching, there is a high level of variability in how and why people incorporate them into the classroom. These variations beg the question of how staff can best support this work: as stewards² of primary resources in special collections, archives, galleries, and other unique collection areas; creators of digitized collections of primary sources; and purveyors of large databases of commercially digitized primary sources content, while also serving as pedagogical consultants and educators in their own right.

Origin of the Project

To address these issues, librarians, information specialists, and a museum educator from Texas A&M University, the University of Miami, Williams College, and Washington & Lee

**Paula S. Kiser is Assistant Professor and Digital Scholarship Librarian at Washington and Lee University Library, email: kiserp@wlu.edu; Christina Larson is Assistant Director at the University of Miami Center for the Humanities, email: clarson@miami.edu; Kevin M. O’Sullivan is Associate Professor of English at Texas A&M University Libraries, email: kmosullivan@tamu.edu; Anne Peale is Chapin Librarian at Williams College, email: aep3@williams.edu. ©2024 Paula S. Kiser, Christina Larson, Kevin M. O’Sullivan, and Anne Peale, Attribution-NonCommercial (<https://creativecommons.org/licenses/by-nc/4.0/>) CC BY-NC.*

University participated in a multi-institutional research project organized by Ithaka S+R in 2019, which investigated how undergraduate instructors used primary sources in their classrooms and how librarians and museum professionals could support them.³ The study included twenty-two additional research institutions which each produced an institutional report; Ithaka authored a bird’s-eye-view report using data from all participating institutions. Upon conclusion of the project, four individuals from the research teams at Texas A&M, University of Miami, Williams, and W&L elected to continue this research to dig deeper into areas outside of the original scope of the project and to compare data, looking for patterns that fell along their Carnegie classification lines. Of particular interest were three core themes: how faculty learn to teach with primary sources; pedagogical approaches to teaching with primary sources; and faculty goals for student learning outcomes regarding primary source instruction.

Institutional Backgrounds

Texas A&M University and the University of Miami are large doctoral granting institutions with high research activity (R1 schools). Texas A&M is a public university in College Station, Texas with a total enrollment of 73,284 in Fall 2021, consisting of 53,876 undergraduates and 13,257 graduate and professional degree students across several branch campuses.⁴ The University of Miami is a private university in Coral Gables, Florida with a total enrollment of 18,485 students in Fall 2021, 11,716 undergraduates and 6,692 graduate students (and 78 non-degree seeking students).⁵ At the other end of the spectrum, Williams College and Washington & Lee are both small liberal arts schools with a Carnegie classification of Baccalaureate College - Arts and Sciences. The highest degree at Williams is a master’s degree and it had 2,121 undergraduates and 50 graduate students in Fall 2021 for a total enrollment of 2,171 students.⁶ Washington & Lee includes a law school; it had 1,859 undergraduates and 381 law students for a total enrollment of 2,240 in Fall 2021.⁷

Rescoping in Response to the Pandemic

In the spring of 2020, faculty and professionals overseeing primary source collections dramatically shifted their practices in response to the COVID-19 pandemic. As those working in higher education navigated remote and hybrid teaching, the range of “outside the box” thinking that had historically produced creative approaches to teaching with primary sources went, as one interviewee put it, “out the window.”

This research study expands the scope of the initial Ithaka S+R study to investigate how the pandemic affected instructors’ use of primary sources in their classrooms, their pedagogical goals, student learning outcomes, and to see if the way they learned to incorporate primary sources into their classroom assignments had an impact on their approach to adapting to new teaching environments. In the late summer and fall of 2021, the authors conducted additional interviews to collect data reflecting on how instructors taught with primary sources through the pandemic, which is an aspect that could not be fully addressed with interviews that preceded the outbreak of COVID-19 and the need for virtual classrooms. This study documents these adjustments, seeking to identify what lessons may be learned from the pivot to remote instruction and what strategies might be carried forward as librarians, archivists, and museum professionals continue to navigate new models for primary source instruction.

By taking advantage of the opportunity to interview the same cohort of instructors both before and after the onset of the COVID-19 pandemic, and by tailoring follow-up questions directly to the effect the pandemic had on instructor use of primary sources, this research stands to make a significant contribution to the professional literature supporting teaching with primary sources. The nature of the interview timing allows for responses that reflect both the instructors' initial reactions to the crisis and their longer-term adaptations to the ongoing pandemic. From these responses, it is possible to analyze feedback from constituents across departments and institutions to offer more generalizable suggestions for what lessons may be learned and what strategies adopted to better navigate the far-reaching effects of COVID's disruption of the classroom.

Literature Review

The original Ithaka S+R research study highlighted existing research that underscores the pedagogical value of primary sources.⁸ Much of this literature provides models and methods for instructors interested in incorporating primary sources into their curriculum. This literature is a key means of knowledge sharing, as despite the widespread popularity of primary source instruction, there remains a scarcity of formal education opportunities for faculty and graduate instructors.⁹ In recent years, several prominent edited volumes have offered strategies for teaching with primary sources: *Using Primary Sources: Hands-on Instructional Exercises* (2014); *Teaching With Primary Sources*, published in 2016 as part of the Society of American Archivists "Trends in Archival Practice" series; *Teaching Undergraduates with Archives* (2019); and *The Teaching with Primary Sources Cookbook* (2021).¹⁰ Beyond these edited collections, the Teaching with Primary Sources Collective maintains an updated bibliography that touches on the use of primary sources in various educational settings.¹¹ Garcia, Lueck, and Yakel (2019) also provide a thorough survey of the professional literature pertaining to teaching with primary sources that includes 154 books and articles published on the topic since 1949.¹² Recent examples include a wide array of works considering how primary sources can enhance student engagement across academic disciplines, primary sources related to underrepresented groups and social movements, as well as those which focus specifically on digital themes.¹³ Of particular note pertaining to this last topic is the work of Brianna Gormly, et al., who have thoughtfully explored the particular challenges and opportunities inherent in teaching with digital primary sources, a topic of increasing concern in undergraduate student education.¹⁴

A growing concern among this literature focuses on the importance of relationships between library, archives, and museum professionals, and their counterparts in the teaching faculty. Alyse Minter, Ashely Todd-Diaz, and La Shonda Mims share their experience embedding information literacy concepts into a required first year seminar course through "co-teaching and collaborative planning" between librarians and instructional faculty with an emphasis on primary source literacy.¹⁵ Beginning in 2018, the Library of Congress implemented a program to help secondary social science student teachers learn historical thinking and plan how to incorporate it into their classroom, delivered through a program of mentorship/apprenticeship and a professional development program with on-site workshops and follow-up activities.¹⁶ And it was the importance of collaboration and fostering relationships between information professionals and instructional faculty that prompted the Teaching with Primary Sources Ithaka S+R study.¹⁷

Building upon the general literature advocating for teaching with primary sources, a significant subset of this growing discourse has emerged, offering guidance for taking on this kind of work in specific academic settings. For example, whereas most authors would agree that primary source-based activities work best in a small- to midsize course section, Flynn (2021) advocates an approach that makes primary source instruction available even to large classes.¹⁸ This subset of the broader literature supporting primary source instruction points to a growing awareness that unique teaching environments demand their own tailored approaches. These lessons would be made abundantly clear with the onset of the COVID-19 pandemic in spring 2020.¹⁹ It is unsurprising, then, that with the arrival of the pandemic there emerged a new and urgent need to foster a dialogue with educators about what support they needed from libraries and museums to effectively teach with primary sources.²⁰ Articles such as these make up one facet of a much broader research trend to analyze and understand the effects of the COVID-19 pandemic on higher education.

Methods

The researchers conducted two rounds of semi-structured interviews with faculty members at their respective institutions. The first round, during the fall of 2019, was in conjunction with the Ithaka S+R Teaching with Primary Sources study. Teams at 26 institutions engaged with a cohort of approximately 15 faculty members at their university or college. Of the 59 interviewees from the four institutions featured here, 44 (74.6%) were from humanities departments, seven (11.9%) from social sciences, and eight (13.5%) from global languages. The researchers coded the interview transcripts using grounded theory methodology and used them as the basis for individual institutional reports, as well as for a summary report by Ithaka S+R.²¹ The authors re-coded the transcripts during the summer of 2021 with a set of core themes and subcodes relevant to this subsequent inquiry. In particular, the authors sought to analyze what similarities or distinctions might appear by a comparison of answers from instructors from their four institutions. They combined the data into one dataset as they moved forward to focus on the out-of-scope issues that were not addressed in the earlier reports. Using one larger dataset proved beneficial once the study pivoted into an examination of how the pandemic may or may not have affected the same issues they were investigating.

Because the COVID-19 pandemic fundamentally altered the way faculty taught with sources, the authors decided to conduct follow-up interviews at each institution. If the 2019 interviews showed a pre-pandemic attitude towards primary sources in the physical classroom, a 2021 follow-up interview could specifically address how the pandemic impacted faculty use of primary sources in a virtual or hybrid classroom. During the fall of 2021, the team re-interviewed almost half of the instructors (26 people out of 59). Twenty-four (92.3%) of these instructors were from humanities departments, one (3.8%) from social sciences, and one (3.8%) from languages. The number of follow-up interviews was lower, because some faculty were on leave from teaching during the pandemic, had left their institutions for other positions, or did not respond to researchers' requests for a second interview. The researchers analyzed these interviews with revised subcodes and an additional core theme designed to capture the adjustments faculty made to their teaching with primary sources during the course of the pandemic across all four institutions (see appendix A). The dataset at each individual school was not large enough to be significant but by combining the data into one large dataset, taking care to notice if any patterns emerged more strongly at one location than another, the

study moved beyond a case study model to a large-scale investigation with implications at institutions of various sizes.

Results and Analysis

Learning to Teach with Primary Sources

One of the three central questions driving the original study was, “How do instructors develop approaches to teaching with primary sources?” Beyond the literature directly related to teaching with primary sources, there is also a significant amount of literature about the lack of formal pedagogical training in graduate programs that is relevant to the present study.²² Many doctoral graduate programs operate on the model of prioritizing research skills over teaching skills.²³ To address this issue, the 2019 interview included the question, “How did you learn how to teach undergraduates with primary sources?” The answers presented a foundation for understanding the types of pedagogical training instructors received before they began teaching undergraduates. Stemming from their disciplinary training, there was significant variation in how faculty defined primary sources in the context of this research. For example, instructors in archeology, art history, and museum studies emphasized physical objects such as buildings, ceramics, and paintings as primary sources while faculty in literature and history mostly focused on the written word.²⁴ The interview prompts excluded discussion of sources gathered in anthologies and critical editions but were intended to include digitized as well as born-digital sources. Instructors tended to combine different types of computer-accessed sources, where a librarian might distinguish between digitized primary sources (e.g., images of book pages) and born-digital primary sources (e.g., the text of a book on a webpage). Even when interviewers knew that faculty engaged with digital and digitized sources, they gravitated more towards discussing physical sources.

Participants often discussed their general disciplinary training. Referencing experiences as early as their undergraduate coursework—whether as students, or as graduate assistants—most described learning by watching more senior faculty model primary source pedagogy. Mentions of formal training of any nature were infrequent, and those who described specific training in primary source pedagogy indicated that those opportunities were provided by museums and special collections, not their own graduate programs.²⁵

Where formal training—whether offered through graduate programs or continuing education opportunities—has fallen short, informal approaches for developing methods of primary source instruction have filled a significant need. Respondents described being “thrown into teaching and told to just kind of do it,” but benefiting greatly from the example of peer mentors. As one interviewee summed it up: “I didn’t have any pedagogy training really whatsoever... I had excellent teachers and I tried to imitate them.” As such, teaching assistantships doubled as apprenticeships. Nearly all respondents (46 interviewees) spoke to learning by observation and having mentors who provided an example to follow, suggesting these experiences are an integral facet of how strategies develop for teaching with primary sources. In a similar vein, many interviewees also spoke about gleaning ideas from syllabi and class assignments that had been shared by these mentors as well as members of their peer group.

In the absence of formal education, many faculty also noted the importance of trial and error in developing strategies for teaching with primary sources. As one respondent commented, “The way that I use [primary sources] changes based on the class, mostly because I learned through the practice of teaching what different classes are capable of.” This experi-

mental approach used by so many of the instructors speaks to a perception of their teaching as something that could evolve and change depending on the course and the students. This spirit of experimentation proved vital after the onset of the pandemic, as instructors were forced to try new and different strategies in remote and hybrid classrooms.

The responses made it clear that the absence of formal training in teaching extends to primary source pedagogy. Rather, respondents pointed to informal methods, such as learning from their own experience as students, drawing on the experience of peers, and self-guided trial and error as the most prevalent ways to hone these pedagogical skills.

Challenges with Pedagogy during the Pandemic

The interviews conducted in 2019 included questions about course design that addressed pedagogical aims, how it evolved over time, and how they incorporated primary sources. These answers became a snapshot of how instructors approached their classes before the pandemic. In the second set of interviews, the question, “How did teaching remotely or to remote students during the pandemic change your approach to using primary source materials in class?” directly addressed the question of change. The authors then compared these responses to the earlier interviews to learn what did or did not change.

Faculty described guiding students’ engagement with sources using a wide variety of pedagogical approaches and tools, many of which had to change when teaching moved online. The abrupt transition to online teaching during the pandemic highlighted the benefits and challenges of teaching with digitized and digital primary sources. Instructors’ reasons for teaching with primary sources remained the same, but they adjusted source format and classroom activities to accommodate a virtual environment.²⁶ Despite the logistical challenges of delivering effective pedagogy in an online environment, faculty participants found engagement with primary sources a strongly positive and worthwhile aspect of their teaching, benefiting students’ intellectual and emotional engagement with learning.

Faculty were highly motivated to continue teaching with primary sources during the pandemic, both to bring novelty to the online classroom and to maintain academic rigor. While a few faculty canceled their planned use of primary sources—especially during the initial move to remote teaching—more than twice that number described adapting existing engagements with primary sources to work within COVID-19 constraints. One participant who refused to work with digital facsimiles bewailed: “It doesn’t have the magic; it doesn’t cast the spell that it needs to. It doesn’t inspire the right kinds of questions,” but many faculty members rapidly adapted their teaching to a fully digital environment. Some faculty who sought new sources and platforms to best fit with virtual teaching reported a shift towards audiovisual formats and even augmented reality for content delivery, so that one participant explained how materials “would feel like [they] were still primary, even though they were remote in some way.” Notably, few described creating entirely new sessions centered around primary sources; instructor comments overwhelmingly focused on adaptation rather than innovation.

The background in experimentation and self-reliance common to many instructors served them well in the pivot to online and hybrid teaching during the pandemic. The instructors talked about using digital primary sources—sometimes new to them and sometimes not—as well as digital tools that they began incorporating into their courses.²⁷ How instructors conceptualized using primary sources was often dependent upon their understanding of and approach to using various types of digital and digitized examples. For some, it was exciting

to find newly digitized items that allowed greater access to collections across the world. Instructors using films or scripts, art, photographs, and foreign language items appreciated the primary source materials they were able to share with their students. Others saw the shift to using digital primary sources as neither better nor worse than using physical items, while a few instructors had a complete lack of interest in finding digital materials or adapting their class in any way.

Bringing primary sources into a virtual environment required extra labor and planning on the part of faculty, minimizing opportunities for spontaneity when bringing primary sources into the online classroom. Many interviewees spoke about the preparation required for virtual teaching, beyond what had been required for in-person instruction. If instructors wanted to use high-resolution digital images of locally held material, it was necessary to ask library or museum staff to prepare those images before class. Instructors who wanted their students to explore new sets of digitized items first needed to become familiar with these resources themselves. Others described preparing videos, data sets, and linking to videos as organizational elements that were not as necessary when they were teaching in-person.

Several participants expressed gratitude for on-demand digitization that allowed online use of locally held collections. One interviewee described the multiple iterations of photographs necessary to capture the detail they wanted their students to see in the item and spoke highly of the staff members who were willing to do this extra work. However, library staff also invested time and energy into preparing virtual teaching methods and tools that were often not used by instructors. Only one interviewee described the use of a virtual reading room format in which a staff member taught with an object via document camera, despite the widespread availability of this assistance. This imbalance is notable in the context of the extensive professional training and conversations around virtual reading room practices that emerged among librarians, archivists, and museum professionals in the early months of the pandemic.

Interviewees who took advantage of digital tools expressed more enthusiasm for online sources than those who treated them as static facsimiles of the original. Several people acknowledged the versatility of using digital primary sources while still preferring physical versions, "Of course there's nothing like holding something in your hands and reading it and seeing it, smelling... And it's always better getting your eyes on something because there are things that aren't captured when you're digitizing a text (but the technology is catching up)." Some instructors vocally resented digital interactions with students and were looking forward to getting back to using physical objects as soon as possible: "Perhaps that experience of being in special collections, especially is heightened more by the fact that we've been doing all this digital stuff."

Adjusting Student Learning Outcomes

The third theme of student learning outcomes surfaced from Ithaka S+R's question in the 2019 study, "How do the ways in which you teach with primary sources relate to goals for student learning in your discipline?" The authors' 2021 question, "How did your goals for student learning outcomes—specifically those related to primary sources—change when you moved to remote teaching?" directly addressed changes in response to the pandemic. The answers to these questions provide a foundational understanding of student learning outcomes related to primary sources and if teaching online had any impact on those goals.

Faculty from all four institutions relayed in 2019 that one of their primary goals for student learning was awareness of the materiality of primary sources, using descriptors like “original” and “authentic” while emphasizing how students were often inspired by these experiences. One faculty member expressed, “They have to interact with the actual object. And that’s where knowledge is built. And knowledge is also built on the materials, the way it’s made, the indentations, the process, and you can’t necessarily get any of that from an image.” Indeed, this preference for physical primary sources *in situ* was prominent for those interviewed and has been central to scholarship on engaging the senses through object-based learning.²⁸

Faculty also described introducing undergraduate students to campus resources as another fundamental purpose of working with primary sources. Physical visits additionally served as a way of building academic community. Interviewees mentioned a wide range of destinations relevant to primary sources: a campus arboretum, academic museum, academic library, special collections, archives, a working letterpress studio, and a campus public sculpture collection. During these visits, faculty introduced students to colleagues working with collections, such as librarians, archivists, curators, educators, and museum professionals. These types of inter-collegial partnerships enable connections between primary sources and a range of academic disciplines.²⁹

No matter the format—physical or digital—instructors described how student learning benefited from primary sources in ways that might be unexpected to others. They relayed how primary sources exposed students to alternative narratives that challenge dominant ways of thinking, encouraged students’ development and practice of close reading and analysis, and provided contextualization of course material. More than half of the participants of the initial interviews (38 interviewees) discussed the use of primary sources in developing students’ critical thinking skills. They saw primary sources as “essential to get students to think for themselves.” More than half of those interviewed (39 instructors) conveyed that primary sources improved students’ understanding of research in their discipline, suggesting it is among the foremost student learning outcomes.³⁰ As one interviewee expressed, “I want them to catch that bug. It’s contagious, the passion for research is something that I want them to experience firsthand.”

But the pandemic posed a fundamental challenge: how can faculty and students learn with primary sources when they no longer have access to physical objects or the physical spaces that house them? Which approaches to primary source instruction can be kept and which ones need to be abandoned? What needs to be adjusted to ensure the success of student learning with primary sources during a global pandemic?

Despite the enormous shift in delivery of instruction as a result of the pandemic, the majority of faculty interviewed (16 out of 26) in the fall of 2021 reported zero to minimal changes to their student learning outcomes. Although they supplemented or replaced material objects with digital ones, they did not report a great amount of disruption in the content of their courses. For instance, one professor said, “I don’t think that [my anticipated learning outcomes] changed at all. I just think that my methods for delivering an experience of analyzing primary materials changed.” Notably, most faculty relayed that they plan to continue employing digital tools and resources when returning to in-person instruction.

For faculty in some specific disciplines, however, digital sources provided a fundamentally inadequate substitute for their pedagogical goals. About one fourth (6 out of 26) of the interviewees did substantially alter their learning outcomes during the pandemic. These indi-

viduals all came from the disciplines of history and art history, areas of study that emphasize physical objects and material culture. One faculty member described their frustration: "It's not fair... to have expectations and learning outcomes associated with the materials if they're simply not accessible. There's no opportunity."

Beyond prompting increased use of digitized sources, the pandemic required faculty to adopt the use of digital tools for accessing, interpreting, and curating those sources. While faculty had previously used digital tools mainly to provide access to sources, in follow-up interviews, faculty from all four institutions described a shift towards student learning outcomes focused on digital scholarship. In order to effectively maintain or enhance student learning, faculty employed a range of tools, including digital exhibitions; images of primary sources from around the world; ArcGIS Story Maps; digital access to primary texts; virtual collections; Zoom interviews with authors, artists, scholars, and colleagues who oversee primary source collections; and multimedia presentation platforms.

When asked about adjustments they made to learning outcomes during the pandemic, many faculty (11 of 26 interviewed) described emotional as well as practical reasons for the changes they made. They refocused priorities to ensure the emotional well-being of their students and themselves. One interviewee explained, "Well, I mean I lowered my expectations. I think my main goal was to keep all the students engaged and to keep them in the class." Such data reflect an important affective facet of faculty decisions to shift their practice in response to the challenges of a global pandemic and point to a broader emotional undercurrent of the 2021 interviews more generally.

Instructors described a wide range of student learning outcomes related to primary sources, and consistently indicated that engagement with primary sources was a core activity for learning. The interviews showed why instructors used primary sources in their classroom, what student learning outcomes they hoped to attain, and what changed (or did not change) during the pandemic and virtual teaching.³¹ Responses reflected faculty concerns that students have tangible experiences, become familiar with local resources, and use sources to expand and challenge their thinking. The pandemic had less of an impact in this area than it did on many other aspects of teaching with primary sources, as faculty reported using new tools and methods, but fundamentally aspiring to the same or similar learning outcomes as they had before the shift to remote learning.

Affective Responses

A prevailing narrative among those who write and think about teaching with primary sources describes the emotional benefit to participants who come to a library or museum to experience materials first-hand. The professional literature abounds with examples describing the "magical awe" of engaging with collections materials.³² 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." 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. Perhaps more surprising, however, were the affective responses of faculty during their follow-up interviews. These more personal statements offered important insight into instructors' emotions and their general attitude toward material sources during the pan-

demical. These responses reveal the personal investment on the part of many faculty in the use of primary source collections and suggest a sense of duty to advocate for them.

In response to questions asked during the initial phase of this study about why they incorporated primary sources into their classroom, respondents shared many of their own emotional responses (or those of students) to first-hand experiences 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. Especially when course content is foreign to students by virtue of temporal or physical distance, responses suggest that in-person engagement provides a sense of immediacy. 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.”

In the follow-up interviews, 16 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.” During the pandemic, a faculty member who canceled planned hands-on use of material sources reported: “I just felt that everyone was so dispirited that it was really difficult to find hooks and ways of interjecting some excitement and interest in the material.”

For even among those who pivoted to online instruction comfortably, there was a common nostalgic longing for the freedom to visit special collections not unlike homesickness. The separation from the physical space and the community supporting it was as significant as the loss of access to the collections themselves. Nevertheless, 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. 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.

As one respondent suggested, libraries and museums are “just as fundamental [to students’ university experience] as the dorms and the food court.” This sentiment was echoed by faculty who reported the reactions of students fortunate enough to spend time with collection materials after a return to in-person instruction. Students were described as experiencing “gratefulness to be engaging with primary sources together live in the class,” and exhibiting “real joy... to actually be in a space and looking at things and talking with one another.” In general, there was a pervasive expression of recommitment among faculty respondents to teaching with primary sources. As one interviewee succinctly put it: “Physical sources remain incredibly important to me. They always worked before, and I think they always will.”

Continuing Practices

As instructors experimented with new ways of teaching in a virtual environment, the researchers

saw value in learning what practices instructors planned to continue to use. Institutions cannot assume that as students and instructors return to the physical class, everything will return to the pre-pandemic normal. The final follow-up question in the 2021 interview, "Which practices of teaching virtually with primary sources will you carry forward as we return to in-person instruction?" addressed this issue. The responses to this question will help academic librarians, archivists, and museum professionals anticipate the continued level of support or provision of services that began during the pandemic that they may not have planned to continue.

Many faculty intend to maintain using pedagogical practices that they adopted during the pandemic. For example, multiple interviewees commented on the benefits of using high-resolution digital facsimiles of collections materials. In contrast to the classic in-person model whereby students hovered around a cradled book or squinted to see details presented by a document camera, digital surrogates allowed students to individually and simultaneously examine and appreciate the granular details of the captured image. As one respondent noted, this opened new possibilities of inquiry for students: "It was really cool thinking about the quality of those digital files and being able to manipulate those digital files in a different way than you would with gloves on in a library session." The digital facility that instructors and staff have gained in providing access to sources in more than one format, and over a longer period of time than a single class visit, can support a broader range of learning and accessibility needs than was possible pre-pandemic. Following the return to face-to-face primary source instruction, such exercises may be paired with hands-on experiences using material to offer an enriched approach to primary source instruction that accurately reflects the digital-analog convergence of twenty-first century academic research.

Remote learning during the pandemic also encouraged faculty to try new digital tools, access primary sources online, and experiment with a greater range of deliverables. While the first two responses might have been anticipated, interviewees emphasized how offering alternative options to the term paper (including student presentations, ArcGIS sites, virtual exhibitions, and creative projects) accommodated a more diverse range of academic strengths and learning styles. One interviewee mentioned that students even shared these types of term projects with family and friends.

The inclusion of virtual guest speakers in classes was another positive practice characterized by respondents as a "silver lining." Prior to the pandemic, many faculty incorporated sessions with primary sources as a "productive disruption" intended to augment the normal rhythm of the semester; virtual guests and virtual visits to collections were essential disruptions to the monotony of online teaching. Every interviewee who mentioned bringing guest speakers to their virtual classroom planned to continue that practice even after campuses have resumed welcoming guests on-site. They noted benefits such as cost savings, logistical ease, and accessibility for guests with disabilities. Having developed lectures, tutorials, and exercises for remote audiences during the pandemic, librarians, archivists, and museum professionals should continue to showcase their institutional collections and widen their impact by seeking out such opportunities for remote class visits. Virtual guest lecturers also open possibilities for inter-institutional collaboration and research in the classroom and beyond.

Discussion

Never has there been such a compelling case for the impact of digital primary sources on student success; most interviewees utilized digital primary sources in their remote classrooms,

either from their own institution or part of a digital collection from another museum, library, or archive. However, while the importance of digital surrogates for remote teaching has been increasingly acknowledged since the onset of the pandemic, the “invisible labor” that makes this possible has not. Even before the pandemic demanded that faculty rely on digital primary sources, the work of digitization was often overlooked or not understood by people using the digital surrogates.³³ The need to provide digital access to primary sources will continue to grow as instructors, students, and the general public expect libraries, archives, and museums to digitize their unique and rare materials. As institutions continue to create enhanced access to materials through digital collections, they should simultaneously advocate for additional resources to support these efforts. Likewise, as librarians, archivists, and museum professionals strive to ensure digitized surrogates are easily discoverable through the incorporation of robust metadata, so too should they advertise other online resources, such as licensed databases and born-digital materials, that are made available through their organization.

Librarians, archivists, and museum professionals will also be in a unique position to assist campus constituents in developing digital scholarship assignments as these innovative deliverables continue to populate course syllabi. In particular, they can support faculty as they design such projects by providing access to primary source content, guidance with technological tools, and pedagogical collaboration for scaffolded assignments; and they can support students as they navigate the tools and resources necessary to successfully complete their work.

Collaboration and mentorship are an essential part of how faculty learn to teach, especially since, as noted earlier, most graduate programs do not offer substantial pedagogical training.³⁴ As this study has revealed, faculty rely heavily on informal relationships among peers and mentors to develop their skill set supporting instruction with primary sources. However, such opportunities may not be universally available to all instructors. As Shiri Noy and Rashawn Ray have demonstrated, ad hoc mentorship relationships have historically been subject to discrimination along race and gender lines, with white men remaining a privileged group across academia.³⁵ An external teaching training program sponsored by a library or museum poses a more egalitarian alternative. Given their resources and extensive expertise with both collections and modes of outreach, institutional collections can serve as a hub for primary source instruction training. By being housed outside a specific academic department, such a program may foster a community of practice wherein instructors from across an organization can connect and share. In establishing such a program, it also behooves librarians, archivists, and museum professionals to reach out especially to potential partners from historically underrepresented groups—for example, through their institution’s faculty of color network.

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.”³⁶ 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.³⁷ 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.³⁸ 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.”³⁹ Much in the way interviewees in the present study responded to the switch to remote instruction by adjusting learning outcomes and expectations, librarians, archivists, and museum professionals should seek to reinforce personal connections to the campus community and empower students with the self-construction of knowledge through personal encounters with collections materials.

Conclusion

With detailed datasets reflecting teaching practices before and during the COVID-19 pandemic, the present study documents an important shift in the development of primary source instruction.⁴⁰ While it is still too soon to know what the long-term effects of this disruption will be, there are strategies that may be carried forward as we continue to navigate new models for this work. Among these are ways to support new and emerging practices for teaching with primary sources; developing instructor training programs; better showcasing collections of digital primary sources; and adopting a trauma-informed approach to outreach in the years to come.

Following the conclusion of the 2019 Ithaka S+R study, several avenues for further research on the nature of teaching with primary sources were apparent to those involved. Perhaps unsurprisingly, the same is equally true for the present study, as interviewees’ responses prompted as many new questions as they answered. As institutions bring faculty and students back on campus for more face-to-face interactions, will course and faculty engagement with collections return to or even increase from pre-pandemic levels? Will the emotional yearning to touch and smell physical objects described by many of the interviewees result in a rush at the gates of special collections, archives, and galleries? Or have people become accustomed to having online access to digitized items from their institutions’ collections? Or both? It will be essential to continue listening to and learning from colleagues and students as we all navigate teaching with primary sources in response to the pandemic.

Appendix A. Follow-up Questionnaire

1. How did teaching remotely or to remote students during the pandemic change your approach to using primary source materials in class?
2. How did teaching remotely or to remote students impact your attitude toward physical and digital primary sources? Was there anything that surprised you?
 - a. What did you think about using physical primary sources before the pandemic?
 - b. What did you think about using digital primary sources?
 - c. Did you have a preference for physical or digital? Did that change?
3. How did your goals for student learning outcomes—specifically those related to primary sources—change when you moved to remote teaching?
 - a. Did you rein in any expectations related to teaching with primary sources?
 - b. Did you change the requirements for any assessments or projects related to primary sources? Number of sources? Complexity of expectations?
 - c. Did you alter the deliverables for the course?
4. Which practices of teaching virtually with primary sources will you carry forward as we return to in-person instruction?
 - a. What practices did not work? Which will you not continue using?
 - b. Did any new resources come available that you are glad exist? Are there any resources that you became aware of during the pandemic that were particularly helpful?

Notes

1. Authorship of this article was shared equally; attribution is thus listed alphabetically.
2. We use this term deliberately to acknowledge the intellectual and pedagogical support that non-faculty instructors, including librarians, archivists, curators, support staff, and other educators provide for primary source teaching.
3. Kurtis Tanaka, Daniel Abosso, Krystal Appiah, Katie Atkins, Peter Barr, Arantza Barrutia-Wood, Shatha Baydoun, et al., "Teaching with Primary Sources: Looking at the Support Needs of Instructors," *Ithaka S+R*, March 23, 2021, doi.org/10.18665/sr.314912.
4. Texas A&M University, "At a Glance," <https://www.tamu.edu/about/at-a-glance.html>.
5. University of Miami, "Fast Facts," <https://irsa.miami.edu/fast-facts/>.
6. Williams College, "Fast Facts," <https://communications.williams.edu/media-relations/fast-facts/>.
7. Washington & Lee University, "Enrollment Report for Fall 2021," <https://my.wlu.edu/prebuilt/fall-2021-enrollment-report.html>.
8. Tanaka, et al., "Teaching with Primary Sources."
9. Patrick Garcia, Joseph Lueck, and Elizabeth Yakel, "The Pedagogical Promise of Primary Sources: Research Trends, Persistent Gaps, and New Directions," *Journal of Academic Librarianship* 45, no. 2 (2019): 95, <https://doi.org/10.1016/j.acalib.2019.01.004>. Garcia, Lueck, and Yakel cite primary source instruction using physical collections as "a key engagement strategy for those working with archival materials." See also: Meggan Press and Meg Meiman, "Comparing the Impact of Physical and Digitized Primary Sources on Student Engagement," *portal: Libraries and the Academy* 21, no.1 (2021): 99, <https://doi.org/10.1353/pla.2021.0007>. Press and Meiman claim teaching with primary sources to be "the most common outreach strategy of archives."
10. Anne Bahde, Heather Smedberg, and Mattie Taomina, eds., *Using Primary Sources: Hands-On Instructional Exercises* (Santa Barbara, CA: Libraries Unlimited, 2014); Christopher J. Prom and Lisa Janicke Hinchliffe, eds., *Teaching with Primary Sources* (Chicago: Society of American Archivists, 2016); Nancy Bartlett, Elizabeth Gadelha, and Cinda Nofziger, eds., *Teaching Undergraduates with Archives* (Ann Arbor, MI: Maize Books, 2019); Julie M. Porterfield, ed., *The Teaching with Primary Sources Cookbook* (Chicago: ACRL, 2021).
11. TPS Collective, "Teaching with Primary Sources Bibliography," TPS Collective, <https://tpscollective.org/bibliography/>.
12. Patricia Garcia, Joseph Lueck, and Elizabeth Yakel, "The Pedagogical Promise of Primary Sources: Research

Trends, Persistent Gaps, and New Directions," *Journal of Academic Librarianship* 45, no. 2 (2019): 94–101, <https://doi.org/10.1016/j.acalib.2019.01.004>. Additional surveys include Lijuan Xu, *Engaging Undergraduates in Primary Source Research* (Lanham, MD: Rowman & Littlefield, 2021) and Sonia Yaco, Arkalgud Ramaprasad, and Thant Syn, "Themes in Recent Research on Integrating Primary Source Collections and Instruction," *portal: Libraries and the Academy* 20, no. 3 (2020): 449–74, <https://doi.org/10.1353/pla.2020.0025>.

13. Bridget Draxler, "Designing Publicly Engaged First-Year Research Projects: Protest Art and Social Change." *Prompt: A Journal of Academic Writing Assignments* 5, no.1 (January 18, 2021): 7–14, <https://doi.org/10.31719/pjaw.v5i1.74>; Meggan Press and Meg Meiman, "Comparing the Impact of Physical and Digitized Primary Sources on Student Engagement," *portal: Libraries and the Academy* 21, no. 1 (2021): 99–112, <https://doi.org/10.1353/pla.2021.0007>; Lijuan Xu, *Engaging Undergraduates in Primary Source Research. Innovations in Information Literacy* (Lanham, MD: Rowman & Littlefield, 2021); Jen Hoyer, "Out of the Archives and into the Streets: Teaching with Primary Sources to Cultivate Civic Engagement," *Journal of Contemporary Archival Studies* 7, no.1 (2020), <https://elischolar.library.yale.edu/jcas/vol7/iss1/9>; Courtney Jacobs, Marcia McIntosh, and Kevin O'Sullivan, "Make-Ready: Fabricating a Bibliographic Community," *The Journal of Interactive Technology & Pedagogy* 18 (December 10, 2020), <https://jitp.commons.gc.cuny.edu/make-ready-fabricating-a-bibliographic-community/>.

14. Gormly, Brianna, Maura Seale, Hannah Alpert-Abrams, Andi Gustavson, Angie Kemp, Thea Lindquist, and Alexis Logsdon, "Teaching with Digital Primary Sources: Literacies, Finding and Evaluating, Citing, Ethics, and Existing Models," #DLFteach (October 7, 2019) <https://doi.org/10.21428/65a6243c.6b419f2b>.

15. Alyse Minter, Ashley Todd-Diaz, and La Shonda Mims, "Breaking Down Traditional Territory Lines: Building Instructional Relationships between Librarians, Archivists, and Discipline Faculty" *LOEX Conference Proceedings 2018* 15, (2022), <https://commons.emich.edu/loexconf2018/15>.

16. Stewart Waters, Anthony Pellegrino, Matt Hensley, and Joshua Kenna, "Forming School and University Partnerships to Learn and Teach with Primary Sources," *Journal of Social Studies Education Research* 12, no. 3 (2021): 47–78, <https://jsser.org/index.php/jsser/article/view/3289/513><https://jsser.org/index.php/jsser/article/view/3289/513>.

17. Tanaka, et al., "Teaching with Primary Sources."

18. Kara Flynn, "Archives and Special Collections Instruction for Large Classes," *portal: Libraries and the Academy* 21, no.3 (2021): 573–602, <https://doi.org/10.1353/pla.2021.0031>. Another example of primary source pedagogy for large classes can be found in Jessica Blackwell and Trevor Holmes, "An Archive Assignment in Women's Studies 101: Designing Hands-on Learning in a Large Class," in *International Perspectives on Improving Student Engagement: Advances in Library Practices in Higher Education*, eds. Enakshi Sengupta, Patrick Blessinger, and Milton D. Cox, (Bingley, UK: Emerald Publishing Limited, 2020), 145–165, <https://doi.org/10.1108/S2055-364120200000026009>.

19. See, for example: Heidi Craig and Kevin O'Sullivan, "Primary Source Literacy in the Era of COVID-19 and Beyond," *portal: Libraries & the Academy* 22, no.1 (2022): 93–109; and Melinda McPeck, Jennifer Piegols, and Ian Post, "Reconceptualizing the Classroom: An Immersive Digital Primary Source Exercise During COVID-19," *Museum and Society* 18, no.3 (2020): 337–40, <https://doi.org/10.29311/mas.v18i3.3534>.

20. Tanaka, et al., "Teaching with Primary Sources," Introduction.

21 A. Strauss and J. Corbin, *Basics of Qualitative Research: Techniques and Procedures for Developing Grounded Theory* (Thousand Oaks, CA: SAGE, 2014); 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://unbound.williams.edu/islandora/object/libraryannualreports%3A3?search=ithaka>; 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>.

22. Terrell E. Robinson and Warren C. Hope, "Teaching in Higher Education: Is There a Need for Training in Pedagogy in Graduate Degree Programs?" *Research in Higher Education Journal* 21 (August 2013), <https://eric.ed.gov/?id=EJ1064657>; Jesse Stommel, "The Human Work of Higher Educational Pedagogy," *Academe: Bulletin of the American Association of University Professors* (Winter 2020), <https://www.aaup.org/article/human-work-higher-education-pedagogy>.

23. Leonard Cassuto, "Why Teaching Still Gets No Respect in Doctoral Training," *The Chronicle of Higher Education*, March 10, 2022, <https://www.chronicle.com/article/why-teaching-still-gets-no-respect-in-doctoral-training>.

24. While this may seem like a generalization, few exceptions from the interviews countered this trend.

While one Classics professor used Roman coins in their class, most of the other humanities professors only talked about texts.

25. The only group of respondents who consistently cited formal pedagogical training were instructors in languages.

26. Instructors used primary sources in the classroom to foster critical thinking skills, humanize the past, appreciate material objects as sources, provide contextualization for material within the course, spark excitement and interest, engage in experiential learning, and train students as researchers. These findings are discussed in the *Teaching with Primary Sources* reports from the four institutions cited above.

27. Instructors rarely distinguished between online collections of primary sources provided as text/html and digital surrogates of the original physical sources unless they were specifically interested in the physical nature of the item as part of their research.

28. See Helen J. Chatterjee and Leonie Hannan, eds., *Engaging the Senses: Object-Based Learning in Higher Education* (United Kingdom: Henry Ling Limited, at the Dorset Press, 2015); and Joanna Cobley, "Why Objects Matter in Higher Education," *College & Research Libraries* 83, no.1 (2022): 75–90, <https://doi.org/10.5860/crl.83.1.75>.

29. See Kristen Totleben and Lori Birrell, eds., *Collaborating for Impact: Special Collections and Liaison Librarian Partnerships* (Chicago: Association of College and Research Libraries, a division of the American Library Association, 2016).

30. Amy Barlow, "Beyond Object Lessons: Object-Based Learning in the Academic Library," in *The Experiential Library: Transforming Academic and Research Libraries through the Power of Experiential Learning*, ed. Pete McDonnell (New York: Chandos Publishing, 2017), 22–42.

31. ACRL, RBMS, SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy, "Guidelines for Primary Source Literacy," *American Library Association* (2018), <https://www.ala.org/acrl/sites/ala.org/acrl/files/content/standards/Primary%20Source%20Literacy2018.pdf>. Instructors' desired outcomes adhered closely to many sections outlined in the Guidelines. Respondents mentioned learning objectives consistent with those described as Conceptualization; Reading, Understanding, and Summarizing; Interpreting, Analyzing, and Evaluating; and Using and Incorporating. However, there was a notable lack of evidence in the area of "Find and Access."

32. Garcia, Lueck, and Yakel, "The Pedagogical Promise of Primary Sources," 95.

33. Melissa Chalmers, "On a Mission to Scan: Visibility, Value(s), and Labor in Large-Scale Digitization," (master's thesis, University of Michigan, 2019), <https://deepblue.lib.umich.edu/handle/2027.42/153473>; Yoonhee Lee, "Towards Universal Access to Knowledge: The Invisible Labor of Digitizing," *Progressive Librarian* 47 (Winter 2019–2020): 118–27, <http://www.progressivelibrariansguild.org/PL/PL47.pdf>.

34. Cassuto, "Why Teaching Still Gets No Respect in Doctoral Training."

35. Shiri Noy and Rashawn Ray, "Graduate Students' Perceptions of Their Advisors: Is There Systematic Disadvantage in Mentorship?" *Journal of Higher Education* 83, no.6 (2012): 876–914, <https://doi.org/10.1080/00221546.2012.11777273>.

36. 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>. Significantly, the study reveals, "The prevalence of major depressive disorder and generalized anxiety disorder is higher among undergraduate and graduate students who did not adapt well to remote instruction."

37. "Faculty Wellness and Careers," *CourseHero* (November 18, 2020), <https://www.coursehero.com/blog/faculty-wellness-research/>. As this study reports, three quarters of faculty cite a loss of campus community as a facet of this stress.

38. 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://www.ncbi.nlm.nih.gov/pmc/articles/PMC7868774/>.

39. 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, <https://doi.org/10.1353/pla.2022.0003>.

40. Acknowledging that most data collected in the course of this study derived from the experience of faculty from humanities departments, the present conclusions are nevertheless applicable to teaching with primary sources across the curriculum.