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Scaffolding the collection manager-instructor relationship

Partnerships for primary source instruction

Whereas the literature on incorporating primary sources into undergraduate education is large and growing,[1] a sustained discussion of the relationship between the collection manager—be it librarian, archivist, or curator—and the course instructor is conspicuously absent. Unlike secondary source material, which can generally be accessed independent of collection managers (or any other gatekeepers), primary source material is often mediated, making it almost impossible for course instructors wishing to use these sources to bypass collection or repository personnel. The partnership between them is therefore vital.

While our professions recognize the centrality of this partnership, we don't discuss the underlying relationship in explicit ways, except perhaps anecdotally. The underlying rationale seems to be that relationship-building of this type does not lend itself to prescriptions or guidelines, and our default position tends to be to wait for time and familiarity to deepen trust and improve communication.

This article challenges that assumption and approach, and, instead, offers some suggestions for aligning the instructor/collection manager relationship with other recommendations outlined in the ACRL RBMS-SAA Guidelines for Primary Source Literacy.[2]

Background

In recent decades, trends in undergraduate education have brought the use of primary source material into the mainstream. Instructors often see this as a way to increase student engagement, to enrich course content, and to distinguish their teaching by fostering the knowledge creation and originality associated with using primary source material.[3]

Collection managers have responded with enthusiasm to these opportunities to put students into meaningful contact with the materials they manage, with a marked increase in dedicated outreach and instruction positions in many archives and special collections. This shift toward more collaboration between collection managers and faculty using primary source material gave rise to the need for a set of use guidelines, which, as one of the members of the ACRL/RBMS/SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy put it, "present core ideas and learning objectives for those using and teaching primary sources."[4] The task force, formed in 2015, produced several iterations of the guidelines, which were open to public comment and published the final draft in summer 2017.

The guidelines were approved by ACRL and SAA in 2018. Guidelines for Primary Source Literacy, which can be found in its entirety on ACRL's website, consists of four core ideas, including analytical, ethical, and

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theoretical concepts, and five key learning objectives, which are essentially a restatement of the hallmarks of a person knowledgeable in the use of primary sources. The present document aims to serve as a companion to these guidelines by addressing ways to optimize the relationship that activates/enacts these core ideas and learning objectives.

Scaffold your relationship

We think of information literacy and the research it enables as being iterative, and I would argue that a parallel exists with the relationship between collection managers and course instructors. I would like readers to consider the notion of scaffolding your relationship with discipline-based faculty or any other instruction collaborators. For our purposes, we can define scaffolding as deliberate, explicitly articulated relationship-building actions and strategies that can become less explicit over time as relationships mature and situations warrant.

Course instructors do not receive guidance about the nature of their relationships with librarians and archivists nor about how to develop these relationships. Further, a widely held, yet narrow, understanding of archivists and librarians as support staff, regardless of faculty status, can be an unhelpful paradigm when it comes to establishing effective instructional partnerships. While it is true that librarians and archivists are institutional staff who support the mission of the university, as well as the course objectives of instructors, scaffolding can help to structure the working relationship as an equitable, collaborative partnership that fosters optimal student learning outcomes.

Just as in instructional scaffolding, scaffolding this relationship necessitates an objective. The objectives for your relationship to your discipline-side instructional partner will vary, but for our purposes, let us consider original undergraduate student research as the objective. Scaffolding for this objective could develop as follows.

- **Keep the big picture in mind.** In all of your interactions with your instruction collaborator, keep the larger picture in mind, namely optimal student learning outcomes. Articulating this learning outcome framework allows you to communicate effectively with your partner(s) regarding important instruction elements and best practices. Without a reminder of the organizing frame of optimal student outcomes, e.g., original research, research best practices—such as interacting with primary source materials only once a research question is in place or creating a plan for instruction assessment—can seem like unnecessary (or needlessly time-consuming) requirements.

- **Understand the course objectives.** Ask for, and read, the instructor's syllabus (or course description in the absence of a finalized syllabus) in order to understand the objectives and trajectory of the course. Syllabi can be in flux until the beginning of the term (and sometimes beyond). This makes planning an impactful intervention challenging, and can lead to frustration on the part of the collection-side instructor. Any information you can gather about the course, however, will help you do a number of things, including determine the optimal number of library sessions needed to achieve identified learning objectives, scope the range and quantity of materials you try to incorporate into a given library session, and determine the best assessment strategies.

- **Advertise your credentials.** This is less an exhortation to be braggadocious about your credentials than an encouragement to underscore them where relevant. In particular, evidence of your own original research produced using primary sources can be an important factor in building a (potential) collaborator's confidence in your understanding of the mechanics of this type of research. Discipline-side instructors are not universally experienced in the use of these materials but, nonetheless, feel, in many instances, obligated to unilaterally set the terms of course interventions involving primary sources. Understanding that they are working with someone experienced with these materials and trained in relevant literacies, can go a long way toward relieving this pressure.

Explaining in an introductory e-mail any training or experience you've had or sharing samples of your work can help to make clear the sorts of assignments you're willing and able to support, or even create. Anecdata abundantly support the notion that discipline-based faculty are often unaware of the educational backgrounds of the librarians/archivists with whom they work most closely. In addition to e-mail, communicating this information can be done simply in a bio appended to an e-mail signature or link to a personal webpage. It can also be incorporated into a course or subject guide.

• **Set expectations.** Another way to be intentional about the cultivation of the collection manager/instructor relationship is to be clear (and confident) about your expectations for your working relationship, and for your course intervention. Setting expectations can be done in an unambiguous yet nonthreatening way that communicates the parameters of your working relationship, pedagogical perspective, learning outcomes for the class, and any logistical concerns. Depending on your comfort level, you can approach this part of building the relationship in different ways. One approach is to embed these expectations in a standing subject guide (as opposed to a guide created for a specific course), to which you can tactfully refer when asked to collaborate or when proposing a collaboration. In such a format, you can explain your teaching philosophy, expectation of the instructor's presence during the session, and the lead time and logistics required to put together a session featuring primary source material, etc. This communication helps instructors understand that this process is one you take seriously, and which requires their commitment.

• **Use easy forms to ask hard questions.** Making arrangements for an instruction session that involves rare or unique materials, or materials requiring special handling, involves logistical planning that can be streamlined through easily accessible web forms. If an intake form is easily accessible and user friendly, instructors will be happy to fill it out. Forms help further set expectations and eliminate misunderstandings because they 1) convey that a lot of preparation is needed for these sessions, 2) allow you to address anything that is of concern to you prior to a session, and 3) make clear your understanding of how the session will unfold.

Questions can include: Objectives for the session? Number of students in the class? Session dates/times? Which materials would you like students to see and interact with? Do students currently know how to use finding aids to locate and retrieve primary source materials? Who else in the library are you and/or your students working with on this project/assignment? With an acute focus on this last point, don't make assumptions about intraorganizational communication, and don't let instructors you collaborate with make them either. Depending on your institution, the size/complexity of your organization might be unknown to your discipline-side partner. It is very important to know whom else they've spoken to/arranged to work with so that you can coordinate within the library or archive, in order to eliminate any misunderstandings or duplication of effort.

Additionally, having these questions answered via a form allows the collection-side instructor the time and room to respond with an intervention strategy, including the optimal number of sessions needed to achieve course objectives.

• **Schedule face-to-face meetings.** Even for the best communicators, e-mail has serious drawbacks, and online forms can't solve every potential problem. E-mail communication should therefore be used as a supplement to in-person meetings, not as a substitute for them. As mentioned, course syllabi don't always reflect course objectives, and course objectives can also change as a function of what is happening in the classroom. Since librarians/archivists are rarely privy to what happens in the classroom outside of sessions they are involved in, it is important to touch base in person when planning an instruction session in order to make certain that the planned session still makes sense within the current reality of the course. For each planned classroom intervention, one face-to-face meeting is recommended. Structuring these in-person meetings along the lines of a reference interview allows not only for further clarification of session objectives, but also for the informal interaction conducive to building an enduring working relationship.

Conclusion

The foregoing is premised on the suspicion that a fear of upsetting a dynamic in which the librarian/archivist is presumed to be the junior partner or helpmeet of the discipline-side instructor often prevents librarians and archivists from being assertive both in establishing the parameters of their relationship to discipline-based faculty, and shaping their course interventions. While it is undeniable that the hierarchical nature of the academy makes it a reasonable assumption that many collection-side instructional partners hold this view consciously or subconsciously, we do ourselves, our instructional partners, the materials with which we have been entrusted, and our students, a great disservice if we do not challenge this way of thinking. There is a distinct possibility that clarity and assertiveness on the part of librarians and archivists would be welcomed by our instructional partners, and could become a highly beneficial professional norm. This article is meant to encourage collection-side professionals to confidently and effectively assert their expertise born of training and experience and in so doing, do justice to students' education.

Notes

1. J. Archer, A. M. Hanlon, and J. A. Levine, "Investigating primary source literacy," *The Journal of Academic Librarianship,* 35(5), 410–20.

2. ACRL RBMS, SAA Joint Task Force (2017), "Guidelines for Primary Source Literacy [PDF document]," retrieved from www.ala.org/acrl/sites/ala.org.acrl/files/content/standards/PrimarySource20Literacy2018.pdf.

3. E. Yakel (2004), "Information literacy for primary sources: Creating a new paradigm for archival researcher education," *OCLC Systems & Services: International Digital Library Perspectives* 20 (2), 61–64.

4. S. Horowitz, "Putting the Draft Guidelines on Primary Source Literacy into Practice," blog post retrieved from www.archivejournal.net/notes/putting-the-draft-guidelines-on-primary-source-literacy-into-practice/.

("Defining and teaching information literacy," continues from page 13)

Notes

1. For more on this see Laura Saunders, "Faculty Perspectives on Information Literacy As a Student Learning Outcome," *The Journal of Academic Librarianship* 38, no. 4 (2012): 226–36.

2. Todd J. Wiebe, "The Information Literacy Imperative in Higher Education," *Liberal Education* 101, no. 4-v102 (2016).

3. Alison J. Head and Michael B. Eisenberg, "Truth Be Told: How College Students Evaluate and Use Information in the Digital Age," Project Information Literacy Progress Report (2010), www.projectinfolit.org/uploads/2/7/5/4/27541717/pil_fall2010_survey_fullreport1.pdf (accessed April 26, 2018).

4. Christine Bruce, "Seven faces of Information Literacy in Higher Education," Website of Christine Bruce, www.christinebruce.com.au/informed-learning/seven-faces-of-information-literacy-in-higher-education/ (accessed April 27, 2018).

5. Carol Kuhlthau, "Information Search Process," Rutgers School of Communication and Information, http://wp.comminfo.rutgers.edu/ckuhlthau/information-search-process/ (accessed April 27, 2018).