

TEACHING METHODS AND PARTNERSHIP DEVELOPMENT PATTERNS FOR
NON-UNIVERSITY ARCHIVISTS

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Ch. 1 Introduction

Teaching with primary sources in the archives allows a wide range of audiences to gain skills in primary source use. It is a vital task for archivists who are assisting new generations of users and helping them understand how archives can assist them in achieving their research goals throughout their lives. Teaching not only acts as an effective form of outreach to its user base, but also allows a larger number of people to access records at one time in a way that facilitates primary source and archival literacy.

University archives often carry an explicit mandate to contribute to the educational environment of their institutions. The university archives and special collections are usually located within easy and convenient reach of professors and their classes for use as teaching tools. But teaching in the archives does not just take place on university campuses. In fact, thoroughly innovative teaching is taking place in non-university archival institutions, with staff incorporating the most modern pedagogical methods and practices. Though many of these institutions place teaching as a lower-level priority compared to their university counterparts, they are still using sophisticated teaching methods that are worthy of research and attention. This thesis explores how archival teaching is practiced outside of the university and offers suggestions for how institutions can implement and improve teaching programs, as well as how library and information science (LIS) programs can better prepare archivists to teach in a wide range of institutions upon graduation.

1.1 Background

Archivists began to seriously examine the role of teaching in the profession in the 1970s with Hugh Taylor and the 1980s with Ken Osborne.¹ Around the turn of the Millennium, teaching archivists began to shift their teaching methods to those of active learning and away from passive learning.² These active learning methods came from the constructivist school of education, which shifted the role of the teacher from an authoritative force to that of a guide who facilitates students' learning through experience, allowing students to put the intellectual pieces together themselves.³ Twenty years later, the archival literature is full of examples of how archivists have designed active learning sessions, started new teaching partnerships, and nudged reactions out of students.

I approached this topic as an archivist who began teaching classes on history, primary sources, and archival literacy with middle and high school students involved in an extracurricular program at a small museum. As I quickly realized that passive learning methods such as tours and show-and-tells did not induce excitement for the subject matter, I began to look to the literature and to my colleagues for advice. I was fully aware that learning and working with classrooms was not restricted to universities, and the meaning of "class" extended beyond an enrolled group of students with a teacher or a professor coordinating the experience. I therefore found it striking that the vast majority of the case studies, examinations, and depictions of teaching in the archival literature took place in university settings.

¹ Hugh Taylor, "Clio in the Raw: Archival Materials and the Teaching of History," *American Archivist* 35, no. 3-4 (1972), 317-330; Ken Osborn, "Archives in the Classroom," *Archivaria* 23, (Winter 1986-87), 16-40.

² American Library Association, *Information Literacy Standards for Higher Education* (Chicago: American Library Association, 2000).

³ Char Booth, *Reflective Teaching, Effective Learning: Instruction Literacy for Library Educators* (Chicago: American Library Association, 2010), 37.

In my case, I did have program coordinators to work with in place of teachers and professors, but I had minimal guidance on how to run individual sessions. In some sessions, the program coordinators did not always understand the archives, and they sometimes suggested topics far outside the scope of the collections. In other instances, I saw ways to incorporate underutilized collections and materials that they were unaware existed and therefore did not plan for into their lesson plans. The nature of the program meant that I did not have formally graded assignments to keep in mind or research papers that the students were writing. Although I knew that archivists, even outside of universities, were doing this type of work, I began to see how the established literature made assumptions about teaching that did not ring true for me. I began to wonder about the extent to which my case was similar to others in the field.

1.2 This Project

This project began as a way to investigate the practices, goals, and objectives of archivists who engage in various teaching programs and who are not located in academic institutions. By utilizing qualitative interviews with teaching archivists, my goal was to learn about the methods being used outside of university settings and how these archivists formed their teaching partnerships in order to undertake this vital form of outreach. Through comparison of the results to the established literature, the goal is to show the areas in which the experiences between university and non-university archivists converge and diverge as they relate to their classes and teaching programs. The additional events of the COVID-19 pandemic – beginning in 2020 and continuing through the present writing in early 2022 – sparked additional questions as to how teaching archivists were adjusting to broader shifts in the nature of work, practice, and education.

With my own initial use of passive teaching methods such as lectures and show-and-tell, I expected to find many non-university archivists doing the same. To a certain extent, the interviews did show this, but I found far more examples of archivists who were finding new ways to share the collections under a number of different institutional structures. Some participants described institutions which strongly supported the teaching initiatives of their archivist; other institutions were utterly indifferent to their archivists' work. Like me, many archivists looked to the field, their colleagues, or their own experiences for advice and inspiration on how to teach. I can personally attest that I have taken formal coursework on teaching since the teaching program began at my institution, and it has helped me significantly, both as an archivist who teaches and as a researcher conducting the work presented here.

The interviews reveal a portion of the field in flux between passive and active teaching methods, more so than the literature focused on universities indicated. They indicate a widespread desire to incorporate active learning methods and that these methods are broadly seen as a goal to reach in teaching, even when difficult institutional situations and structures – or unforeseen events like the pandemic – stand in the way of change. They also indicate that institutions such as boarding schools, with their own built-in user base and partners, function very similarly to their university counterparts, and that archivists outside the university realm are attempting to expand the subjects that they teach about and diversify the audiences that they teach to and about. On the other hand, the different institutional structures and user bases mean that forming partnerships becomes far more based on networking and word-of-mouth advertising rather than active processes of searching for partners. Particularly when these partners include people like volunteer groups, genealogists, and community-interest groups, the goals of the lesson change significantly, along with the teaching methods.

The interviews also reveal a hesitancy to teach among many in the field. Even those that do not have this hesitancy face a challenge in preparation for the role. Just as I initially turned to colleagues when I began teaching, many others did the same or pulled from past experience before becoming archivists. I was fortunate enough to take a course on user instruction here at the University of Maryland iSchool; if I were included in my data set, this would make me an outlier. The lack of formal training certainly plays a part in archivists' hesitancy in being willing to take on this task.

I can also say that the benefits of active learning became apparent to me very quickly once I began using them. Students grew more excited and made greater intellectual strides, and I became far more comfortable in the classroom as I went from knowledge fount to guide. With the success of the second year of the teaching program in my institution, in which I incorporated far more constructivist teaching methods than in the first, I have begun to expand the number of classes I teach and even occasionally reach out to new audiences. I can say that it has become among the most rewarding of my job duties and most beneficial to my institution. I am not in a university archive, and I do not have an institutional mandate to teach necessarily, but I have accepted the mandate of the profession to ensure that the collections are put to beneficial use.

1.3 Structure of This Thesis

“Chapter 2: Literature Review” will examine the literature that influenced this study from the education and LIS fields. It will focus on different schools of thought in teaching and the development of active learning teaching methods, as well as case studies and examinations of teaching programs in the archival literature. Although the overwhelming majority of these take place in university contexts, they provide a measurable experience against which to compare the

results of the qualitative interviews, with the notable exception of a small number of very recent studies that do focus on non-university institutions.

“Chapter 3: Methodology” focuses on the reasoning behind the way this study was conducted, the way participants were recruited, and the way questions were created. This chapter also contains statistics about the participants who formed the dataset for this study.

“Chapter 4: Findings” shows the trends and results of the interviews. This includes the role of institutional contexts in forming teaching partnerships and the use of passive and active teaching methods. It also contains discoveries of the ways that their institutions attempt to broaden the subjects of their teaching curriculums and how participants received their pedagogical training. Lastly, it looks at changes that occurred in teaching programs since the start of the COVID-19 pandemic.

“Chapter 5: Discussion” proposes that the LIS field embrace a more expansive view of what teaching in archives encompasses, discusses how teaching archivists outside universities are confronting the challenges of institutional colonialist legacies, and explores the implications for teaching in the wake of the pandemic. It also explores the demographics of the archival teacher and the implications for achieving workplace equity. I also offer recommendations on how to form partnerships and expand teaching programs, based on my synthesis and interpretation of the qualitative data arising from the interviews.

“Chapter 6: Conclusion” offers some final advice for archivists looking to begin teaching themselves or to incorporate teaching programs into their institutions.

Chapter 2: Literature Review

The literature that discusses archival teaching programs comes from both the library and information science (LIS) and education disciplines. The LIS profession has applied many of the practices of the education field to fit their specific needs and circumstances, which take the form of such structures as the one-shot session, the embedded archivist, and long-term partnerships with teachers/professors. Common topics of study in the literature include teaching methodology and various techniques, but this only forms a portion of the literature related to archivists and teaching duties. Other topics that receive significant scholarly research include the formation of teaching partnerships, the need to reach out to various audiences, or ways that various audiences interact with the archives.

While my research focus is on archivists who teach in institutions outside of the universities, the literature of the profession rarely reflects these teaching experiences. At the time of this writing in 2022, the last five years' worth of *The American Archivist* and the *Journal of Contemporary Archival Studies*, both published in the United States, included seven articles related to teaching. Five related to teaching of undergraduates, and two related to teaching of K-12 students. Only one of the articles addressed this topic in a non-academic institution.¹ None at all discussed adult learning or adult groups. One addressed more generalized concepts and therefore had not specified the type of institution conducting the teaching.² The literature extensively reflects the methods, partnerships, and institutional experiences of teaching archivists in university settings and forms the standards promulgated by the literature today.

¹ 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. 9 (2020), 1-16.

² Anderberg, Lindsay et. al., "Teaching the Teacher: Primary Source Instruction in American and Canadian Archives Graduate Programs," *American Archivist* 81, no. 1 (2018), 188-215.

2.1 What is Teaching and How Is It Done?

Ultimately, the definition of “teaching” can be tricky. For the purposes of my study, I have intentionally kept it vague, only specifying that I did not mean teaching courses on archival theory in an LIS program when asked. Steven Escar Smith defined teaching, particularly in a K-12 environment, rather broadly and specifically listed, in addition to “traditional classroom teaching,” the creation and facilitation of “exhibits, displays, guided and selfguided [sic] tours, lectures, readings, demonstrations, colloquia, symposia, conferences, publications of all kinds, Web-based projects, etc.”³ He suggested that teaching and outreach are two sides of the same coin, while also bemoaning the lack of funding and time that archivists are able to devote to these projects. Wendy Duff and Joan Cherry, focusing on university archives, pointed to a wide range of tasks as well, including:

...five general areas of archival instruction: short, one-on-one orientation interactions that take place during registration or at the reference desk; tours of archival facilities that may include an introduction to the archives’ policies and procedures; online or hands-on tutorials that cover archival sources, ninety-minute to three-hour sessions that describe the archives and discuss a variety of sources, or full-term courses that involve research training and promote critical thinking skills.⁴

For the purposes of this project, I did make the choice to focus on teaching as it takes place in a group, as I consider this most necessary for some sort of “class.” Thus, this does not include assistance for individual projects, such as that done in a reference interview.

Patricia Garcia contributed a new meaning of teaching that could only come after the wide acceptance of the Internet and its use in the classroom – the ability to make documents and teaching materials available from a distance. These packages and lesson plans were for the

³ Steven Escar Smith, “From ‘Treasure Room’ to ‘School Room’: Special Collections and Education,” *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 7, no. 1 (2006), 31.

⁴ Wendy Duff and Joan Cherry, “Archival Orientation for Undergraduate Students: An Exploratory Study of Impact.” *American Archivist* 71, no. 2, (Fall/Winter 2008): 501-502.

direct use of teachers and educators for their students, rather than for direct use by the students.⁵ The largest archival institutions in the United States, the Library of Congress (LOC) and National Archives and Records Administration (NARA), follow this method through their own curated packages of lesson plans, materials, and digitized primary sources.⁶

Direct utilization of the archives was not the first use of primary sources in the classroom. According to Hugh Taylor, one of the first to discuss teaching with archives in the early 1970s, publishers have been creating compilations of sources and documents for K-12 English and history classes since the turn of the 20th century, even if they did not begin to receive wide use in their early days with the primarily passive learning methodology of the time.⁷ While he appreciated the efforts to engage students beyond mere instruction, he considered the compilations substantially not much better, quoting P. J. Lee in his critique that “they posed no problems essentially different from secondary sources.”⁸ These tools only reinforced the “sage on the stage” in their passive instruction and, in his context of local English history, poor alternatives to the plethora of local history collections that could create “kits” that provide the opportunity to truly question and interact with documents far more substantially than the published collections.⁹

School librarians were confronting the challenges of teaching information literacy sooner than the archival field. From the tradition of the school librarians, the efforts of Anne J.

⁵ Patricia Garcia, “Accessing Archives: Teaching with Primary Sources in K-12 Classrooms,” *American Archivist* 80, no. 1 (2017), 189-212.

⁶ “Education Resources from the Library of Congress,” Library of Congress, accessed January 30, 2022, <https://www.loc.gov/education/>; “Educator Resources,” National Archives and Records Administration, <https://www.archives.gov/education>, accessed January 30, 2022.

⁷ Hugh Taylor, “Clio in the Raw: Archival Materials and the Teaching of History,” *American Archivist* 35, no. 3-4 (1972), 318.

⁸ P. J. Lee, “History at the Universities: The Consumer's View of Oxford History,” *History* 55, no. 185 (1970), 333, quoted in Taylor, “Clio in the Raw,” 321.

⁹ Taylor, “Clio in the Raw,” 322.

Gilliland-Swetland, Yasmin B. Kafai, and William E. Landis investigated the methodology being employed in K-12 schools to incorporate primary sources. These researchers focused on the methods of implementation, such as pre-selecting materials for younger audiences and doing so in a way that kept documents safe, while still preserving the material experience of interacting with primary sources.¹⁰ Thus, the school librarians were also creating the “kits” so advocated by Taylor and later created in the digital realm by the LOC and NARA.

In 2000, when the Association for College and Research Libraries (ACRL) approved their *Information Literacy Standards for Higher Education*, they officially endorsed a field of pedagogy for the university library that recommended “strategies that require the student to engage actively.”¹¹ In other words, the ACRL expected their students to be able to question, research, and communicate discoveries. This pedagogy, known as constructivist or active learning, focuses on students as active participants in creating their own knowledge, rather than passively absorbing information as it is presented to them. As a contrast, the methods of passive learning consist of such methods as tours and “sage on the stage” lectures where there is the expectation of an expert passing on information. The use of passive methods increasingly fell out of favor after this, with Elizabeth Yakel criticizing the effectiveness of sessions in which they were utilized, citing users that called them “non memorable,” and with minimal applicability.¹² When the *Standards* were first approved, they built upon the work already being undertaken by K-12 librarians and approved and encouraged them for use in the university library.¹³

¹⁰ Anne J. Gilliland-Swetland, Yasmin B. Kafai, and William E. Landis “Integrating Primary Sources into the Elementary School Classroom: A Case Study of Teachers’ Perspectives,” *Archivaria* 48 (1999), 89-116.

¹¹ American Library Association, *Information Literacy Standards for Higher Education* (Chicago: American Library Association, 2000), 4-5.

¹² Elizabeth Yakel, “Listening to Users,” *Archival Issues* 26, no. 2 (2002): 111–27.

¹³ American Library Association, *Information Literacy Standards for Higher Education*, 5.

After revisions in 2011 and 2015, ACRL and the Society of American Archivists (SAA) jointly approved their *Guidelines for Primary Source Literacy* in 2018. This sought, firstly, to address the gap that existed in both the original and subsequent editions of the *Standards* and addressed primary source materials, university archives, and special collections settings for the first time, along with the unique challenges that accompany these resources. Secondly, although the guidelines also sought to expand the scope of the *Standards* to audiences beyond university students, the primary audience was still “librarians, archivists, teaching faculty, and others working with college and university students.”¹⁴ In this way, the *Guidelines* advocate their use amongst archivists and teachers to “develop significant learning experiences and assessment strategies and measures appropriate to their local needs and specific pedagogical aims.”¹⁵

Although neither the *Standards* nor the *Guidelines* explicitly chastises any teaching methods, they were written with the goal of moving the field towards methods of active learning and away from those of passive learning. Other members of the profession documented their incorporation of primary source literacy and active learning in the professional literature, particularly in the university setting. The Reference, Access, and Outreach Section of SAA started their “Case Studies in Primary Sources” series in 2017.¹⁶ All of this points to active learning becoming the standard, yet the standard place for teaching being understood almost exclusively as a university setting. For reference, all but two of the Case Studies take place in university settings.

¹⁴ Association of College and Research Libraries’ Rare Book and Manuscript Section and Society of American Archivists Joint Task Force, *Guidelines for Primary Source Literacy* (N.p.: Association of College and Research Libraries’ Rare Book and Manuscript Section and Society of American Archivists, 2018), 1.

¹⁵ Association of College and Research Libraries Rare Book and Manuscript Section, *Guidelines for Primary Source Literacy*, 2-3.

¹⁶ “Case Studies on Teaching with Primary Sources,” Society of American Archivists, accessed January 24, 2022, <https://www2.archivists.org/publications/epubs/Case-Studies-Teaching-With-Primary-Sources>.

When the *Guidelines* were published, they codified some of the changes which the archival field had undertaken to bring the methods of the *Standards* into the special collections and archives. By 2010, a study by Magia G. Krause found that archivists and special collections librarians were already heavily involved with their institutions' information literacy instruction and focusing their teaching on primary sources. Furthermore, responses revealed that the majority of respondents utilized active learning with undergraduate participants.¹⁷ In addition, Yakel noted that the shift in language of archival and primary source teaching from tour guides and "greatest hits" to that of a teacher opened up the potential for archivists to create curricula and new models of assessment rather than mere lessons.¹⁸

Another aspect of active learning that the field began to confront with the *Standards* was the need to assess and measure the quality of the teaching experiences for learners. In traditional courses and in teaching sessions outside of a library setting, assessment typically takes the form of assignments and tests. According to Mary Snyder Broussard, Rachel Hickoff-Cresko, and Jessica Urick Oberlin, using this as the sole method of assessment was not particularly helpful because "the evidence of student learning is received too late to be useful."¹⁹ Teaching archivists must assess their teaching in the moment or in more "formative" ways rather than through these final, "summative," assessments.

Libraries and archives often utilize informal assessment, particularly when they are teaching one-shot sessions and facing a highly limited amount of time. Brandy Whitlock and Julie Nanavati looked at the benefits and drawbacks of both formal and informal assessment,

¹⁷ Magia G. Krause, "'It Makes History Alive for Them': The Role of Archivists and Special Collections Librarians in Instructing Undergraduates," *Journal of Academic Librarianship* 36, no. 5 (2010), 405.

¹⁸ Elizabeth Yakel, "Teaching Undergraduates with Archives," in *Teaching Undergraduates with Archives*, ed. Nancy Bartlett, Elizabeth Gadelha, and Cinda Nofziger, (Ann Arbor, MI: Maize Books, 2019), 283.

¹⁹ Mary Snyder Broussard, Rachel Hickoff-Cresko, and Jessica Urick Oberlin, *Snapshots of Reality: A Practical Guide to Formative Assessment in Library Instruction* (Chicago: Association of College and Research Libraries, 2014), 4.

pointing out that formal assessment, while creating hard data that can be heavily analyzed later, required “the structure to house, analyze, and report collected data, as well as significant human resources to manage the data and make it meaningful.”²⁰ It is this difficulty that led Krause to point out that, “In practice...few repositories have any kind of formal evaluation for their instruction efforts,” and led them to advocate for a rubric to better gain benefits of analyzing effectiveness of teaching methods through an assessment method.²¹ This rubric eventually took the form of the Archival Metrics Toolkit, which, among practical ways to capture data on users, reference requests, and processing, included data to capture during teaching sessions in a “Teaching Support Questionnaire,” which gathers data on a 1-5 scale on how such factors as reference staff, finding aids, and instruction space met teaching goals for a given institution.²²

2.2 Forming Partnerships and Finding Students

In order for a session to run smoothly and meet the goals of all parties, including the archivists and instructors, the ideal teaching scenario described in the literature involves the archivist and instructor in a university setting having a relatively high level of collaboration. Rather than the archivist being in a position of providing typical reference service or “customer service,” Kathryn G. Matheny wrote how the archivist and instructor must communicate to clarify goals, without the archivist being dismissed by the partner. Her requirement was that both should have a say in the designing of an active lesson with objectives

²⁰ Brandy Whitlock and Julie Nanavati, “A Systematic Approach to Performative and Authentic Assessment,” *Reference Services Review* 41, no. 1 (2013), 34.

²¹ Magia G. Krause, “Undergraduates in the Archives: Using an Assessment Rubric to Measure Learning,” *American Archivist* 73, no. 2 (2010), 507–534.

²² University of Michigan, the University of North Carolina-Chapel Hill, and the University of Toronto, “Teaching Support,” Archival Metrics, accessed March 24, 2022, <https://sites.google.com/a/umich.edu/archival-metrics/>.

beneficial to all parties.²³ Numerous case studies about positive education initiatives in the archives, including those by Danielle Emerling and Leslie Waggener, stress the importance of having this positive relationship where the instructor communicated their goals and intentions clearly to the archivist and the archivist was clear about expectations and their ability to fulfill them.²⁴ It is noteworthy that these case studies took place well after publication of the *Standards* and into the era when the *Guidelines* were being written and published.

Of course, a university archive has the advantage of being able to advertise itself across a limited scope of a user base – that of the university it serves. When an archive has a far wider scope, or one that can be quite amorphous across geographic bounds and every conceivable age and interest group, this type of advertising becomes far more difficult. This may force an archive to fall back upon the relationships that it knows and is far more comfortable with. In a non-university setting, with a user base often consisting of a geographic area – or even an entire region, state, or nation – the potential partners grow to include so many different audiences that forming teaching partnerships must naturally differ. While this may not necessarily increase the number of partnerships, archives may hope to achieve more frequent uses or utilization of a wider variety of materials.

2.3 What is Being Taught?

Forming new partnerships also serves to expand the use of archives to different subject areas, therefore showing the relevance of the materials to a wider range of people for a wider

²³ Kathryn G. Matheny, “Instruction Consultation for Archives Visits: Why No One Talks About It, and Why They Should,” *American Archivist* 82, no. 2 (2019), 488-500.

²⁴ Danielle Emerling, “Civics in the Archives: Engaging Undergraduate and Graduate Students with Congressional Papers,” *The American Archivist* 81, no. 2 (2018), 310–322; Leslie Waggener, “Milestone, Not Millstone: Archivists Teaching First-Year Seminars,” *American Archivist* 81, no. 1 (2018), 165-187.

range of purposes. In the recent collection of archival case studies, *Teaching Undergraduates with Archives*, multiple articles touched upon the gathering of a wide range of professors at different universities. For example, Joshua Youngblood wrote about his own experience in a university library having a series of strong experiences with the university's history department. After past sessions where students received a show-and-tell, multi-visit active classes, and instruction sessions on a variety of subjects, he pointed to the need to look toward new subjects to increase the scope of the teaching audience. Bringing this to his administration secured him a place in the orientation for the Honors College and for junior faculty.²⁵

Alongside the attempts to increase subject diversity are the ways that archivists are attempting to confront the historical legacy of colonialism and whiteness in the act of collecting and in the institutions in which archivists serve. These colonialist archives uphold the power structures of the settler colonialist state, in this case the universities, governments, and museums centered and founded around whiteness.²⁶ The movement for community archives has been a way to confront the “symbolic annihilation” of institutional collections that occurs when marginalized groups were “absent, grossly under-represented, maligned, or trivialized” by the mainstream, as Michelle Caswell discussed in 2014.²⁷ This echoed a call being made since the 1970s by Howard Zinn to document a further and wider range of experiences in the archives.²⁸ Although these works do not directly address teaching with archives as a way to address whiteness, designing sessions and working with teaching partners to incorporate

²⁵ Joshua Youngblood, “Oh, It’s You Again: Increasing Archival Instruction through Sustainable Relationships,” in *Teaching Undergraduates with Archives*, ed. Nancy Bartlett, Elizabeth Gadelha, and Cinda Nofziger (Ann Arbor, MI: Maize Books, 2019), 120-121.

²⁶ Jeannette Allis Bastian, “Reading Colonial Records through an Archival Lens: The Provenance of Place, Space and Creation,” *Archival Science* 6, no. 3-4 (2006): 278-79.

²⁷ Michelle Caswell, “Seeing Yourself in History: Community Archives and the Fight Against Symbolic Annihilation,” *Public Historian* 36, no. 4 (November 2014), 27.

²⁸ Howard Zinn, “Secrecy Archives, and the Public Interest,” *Archival Issues* 2, no. 2 (1977), 14-26.

materials of more diverse subjects certainly fits into the work of addressing the destructive “isms” related to race, gender, social class, disability, and sexuality.

Beyond the methods and goals of archival teachers, there are also the demographics of how many archival teachers are within what types of institutions. Krause’s survey in 2008 provides the most recent data regarding membership of the SAA Reference, Access, and Outreach Section, which often addresses archival teaching. Of the over 200 responses to the survey that she received, 54% came from academic archives or special collections. The remaining 46% came from all variety of institutions, including government, religious, corporate, museums, public libraries, and historical societies.²⁹ Keeping in mind that this survey was conducted about halfway between the *Standards* and the *Protocols*, the results related to characteristics of instruction also showed that “the tendency of instruction sessions was to lean toward procedural information rather than conceptual knowledge” and also usually included such elements as a tour of the reading room and an overview of the website.³⁰ Krause noted that, at this stage, libraries and museums had largely adopted constructivist learning, while archives largely had not, still maintaining a fairly consistent practice of these passive methods of learning.

2.4 Teaching Outside the University

Since the publication of the *Framework*, archival literature related to teaching has focused on university libraries, the *Framework*’s target audience. Usually, as would be expected, this addressed university archivists teaching undergraduate and graduate students,

²⁹ Magia G. Krause, “Learning in the Archives: A Report on Instructional Practices,” *Journal of Archival Organization* 6, no. 4 (2008), 238-239.

³⁰ Krause, “Learning in the Archives,” 240-244.

although it occasionally addressed teaching K-12 students.³¹ These cases that address K-12 learning typically took place in K-12 school settings or under the purview of university archival collections. Gilliland-Swetland addressed this during the time when the *Framework* was being written, and called early on for using archives to “grow a ‘records literate’ as well as ‘information literate’ audience” amongst K-12 students. Advocating for this in the late 1990s, Gilliland-Swetland encouraged early use of the Internet to bring archives to as wide an audience as possible, while also taking measures to keep the materials safe.³² Although Gilliland-Swetland still envisioned this as a university special collections reaching a new audience, it was an audience that was beyond the standard community of a university.

Hoyer’s case study of the “Brooklyn Connections” program at the Brooklyn Public Library was the exception of an article in the leading publications of the archival literature not related to a university teaching program. This case study utilized the special collections to teach under-resourced local K-12 schools about civic engagement, examining three partnerships between the Library and area schools, each with a slightly different project and goal. These partnerships utilized methods of active learning, such as utilizing assessment tools to measure student growth and utilizing places and materials relevant to the students’ lives. The archivist had prepared beforehand to provide relevant materials through discussions with the primary teacher. The classes were conducted in an “on the road” format, with the librarian traveling to the school for four to six sessions, which diverged from much of the literature on university or K-12 teaching which assumed the sessions were taking place in a library environment or in a heavily virtual space with digitized materials. It is also worth mentioning that these lessons

³¹ Anne Gilliland-Swetland, “An Exploration of K-12 User Needs for Digital Primary Source Materials,” *American Archivist* 61, no. 1 (1998), 137.

³² Gilliland-Swetland, “Exploration of K-12 User Needs,” 142-156.

involved teaching with an explicit goal – civics education – rather than library and information literacy skills.³³

2.5 Summary

This chapter presents some of the major themes in the archival literature as it relates to teaching and instruction in classroom settings. The vast majority of it utilizes the university as its frame of reference, to the neglect of a wide swatch of the teaching as it occurs in the field. The themes that I address in this literature review reflect the definition and primary way that teaching takes place; methods of teaching, specifically the incorporation of active learning methods; the need to form teaching partnerships in an archival teaching program and the method with which those partnerships are formed; and, lastly, the goals and methods of non-university teaching archivists. The literature of the field on this final topic is very small at this point, vastly disproportionate to the percentage of the field that falls into this category. It is a goal of this thesis to show the ways in which teaching does take place in these institutions and the degree to which it reflects and diverges from the literature derived from the university teaching experience.

³³ Hoyer, “Out of the Archives and Into the Streets,” 1-16.

Chapter 3: Methodology

This project utilized a constructivist grounded theory approach to analyze interviews from archivists who have teaching duties and are employed in institutions outside of university settings. I selected this approach as the best way to gather information to allow for a range of experiences and institutional situations, as well as offer research subjects the opportunity to go into as much or as little detail as they felt was necessary to explain their circumstances. The interviews focused on the teaching methods, ways that they developed teaching partnerships, and education in the field of teaching. It also asked about recent developments in their teaching regimens related to the ongoing COVID-19 pandemic of 2020 through the present.

3.1 Developing Interview Questions

This thesis began as a class project for INST 608I at the University of Maryland iSchool, a course on qualitative research methods. In this class, I began to craft a series of interview questions and conducted two interviews. These first interviews were with archivists whom I knew personally, and the interviews were conducted through video conference software. They were conducted as semi-structured interviews; not every question was included in every interview, based on applicability. There were also several unscripted questions which came up based on the individual situations of test subjects.

As this class project expanded to a full thesis, I began to consider these two initial interviews as test interviews. They were not included in the final set of data, so as to avoid potential conflicts of interest from my conducting of interviews with people I knew well in my private life. I then refined the questions in order to conduct a third test interview and finalized

the question set that I would use for all interviews in the formal dataset [See Appendix A: Interview Questions]. The test interviews were coded T1-T3.

3.2 Recruitment

My goal was to gather between 10 and 15 interview subjects. This would provide a balance between a critical mass of data and my own abilities to find research subjects and conduct interviews of significant depth. As a first recruitment attempt, I posted an advertisement to the individual state caucus listservs of the Mid-Atlantic Regional Archives Conference (MARAC) [Appendix B: Recruitment Note]. The state caucuses covered the states of New York, New Jersey, Pennsylvania, Maryland, Delaware, West Virginia, Virginia, and the District of Columbia. The notice explicitly asked for archivists from non-university institutions who have teaching duties. My contact information was included, and interested participants were free to respond directly to me.

I offered each research subject a \$25 Visa gift card as an incentive to participate, and I asked each interested subject to review and sign a consent form [Appendix C: Consent Form]. This form detailed how the interview materials would be used, asked interviewees if they were comfortable being recorded, and stated that they may back out of the project at any time with no penalty, save the loss of the \$25 gift card. Nobody declined to participate in the study after an interview, although several participants did decline the gift card for personal reasons or to avoid conflict of interest laws related to their positions.

When posting the recruitment notice failed to garner the desired number of respondents, I posted the notice to another listserv, that of the Teaching with Primary Sources (TPS) Collective. I also asked my advisors for their recommendations of individuals to contact directly

through email. This brought me to my desired number of interviews. There were a handful of respondents who misunderstood my recruitment advertisement, thinking that I was asking for teachers of classes in archival theory and practice in Library and Information Science Programs. I politely declined these volunteers.

While I made the offer to travel to a public location to conduct interviews for those that were within convenient travel distance of me, I also was open to using video conferencing software or the telephone to conduct interviews. Due to travel inconveniences and the ongoing COVID-19 pandemic, all interviews ended up being conducted remotely through Zoom or similar videoconferencing software. Most research subjects indicated their willingness for the audio and video to be taped. However, a few demanded that only the audio of their interview be used, and some declined to be recorded on camera or audio. In these latter cases, I took detailed notes in lieu of recordings. Each research subject was assigned a code number from P1-P12 for the purpose of anonymization.

3.3 Transcription and Analysis

For each interview in which the research subject allowed me to record the session, I utilized the rev.com transcription service to transcribe the interviews. I then proofread the transcripts and removed any identifying information. My research subjects were given the opportunity to read their interview transcript in order to ensure it was anonymized to their comfort. For those interviews in which the participants declined audio recording, I transcribed and anonymized the detailed notes as if they were the transcripts and made them available to the research subject for approval.

The call for volunteers advertised that interviews would take around one hour. The longest recorded interview was 70 minutes, with the shortest lasting 35 minutes. The average of the recorded interviews, not including those for which I took detailed notes and an exact length was unavailable, was 48 minutes. After all of the above-stated recruitment efforts, I was able to conduct 12 interviews with research subjects. Although I had expected the interviewees to exclusively be drawn from institutions based in the United States, based upon the organizations I posted the notice to, a portion of my interviews were with archivists located in Canadian institutions.

The research subjects that I interviewed came from three categories of institution: historical societies, government of various levels, and boarding schools. While I do not claim that this is an accurate statistical representation of the archival professionals who are teaching outside of universities, the combined testimony of their experiences provides insight into the state of teaching in these types of institutions, as well as insights that may be extended to other types of organizations such as corporate archives, public and private libraries, and museums with archival collections. The testimonies provide a way for me to compare and contrast their experiences with the written experiences of archivists in university settings that most commonly form the archival literature on the subject, revealing places of similarity and places of divergence in priorities, methods, and practical experiences. There were six participants from government institutions of all levels, from local to state to federal; three participants from historical societies; and two from boarding schools. One participant had experience teaching as an archivist in both a boarding school and a historical society.

I categorized the participants on the basis of career stage: early, mid-career, and experienced, where early career is defined as five years or less, mid-career as 6-10 years, and

experienced as more than 10 years specifically in the archival field. Participants included two early career archivists, four mid-career archivists, and five experienced archivists. One did not disclose this information. As it relates to each specific type of institution represented in the data, government archivists had two representatives early in their career, one mid-career, two experienced, and one who did not disclose this information. Boarding schools had one mid-career and one experienced archivist. Historical societies had representation from two mid-career archivists and one experienced archivist. The archivist with experience in both a boarding school and historical society setting was classified as experienced in their more recent position and early career in their previous institution. This information is summarized in Figure 1.

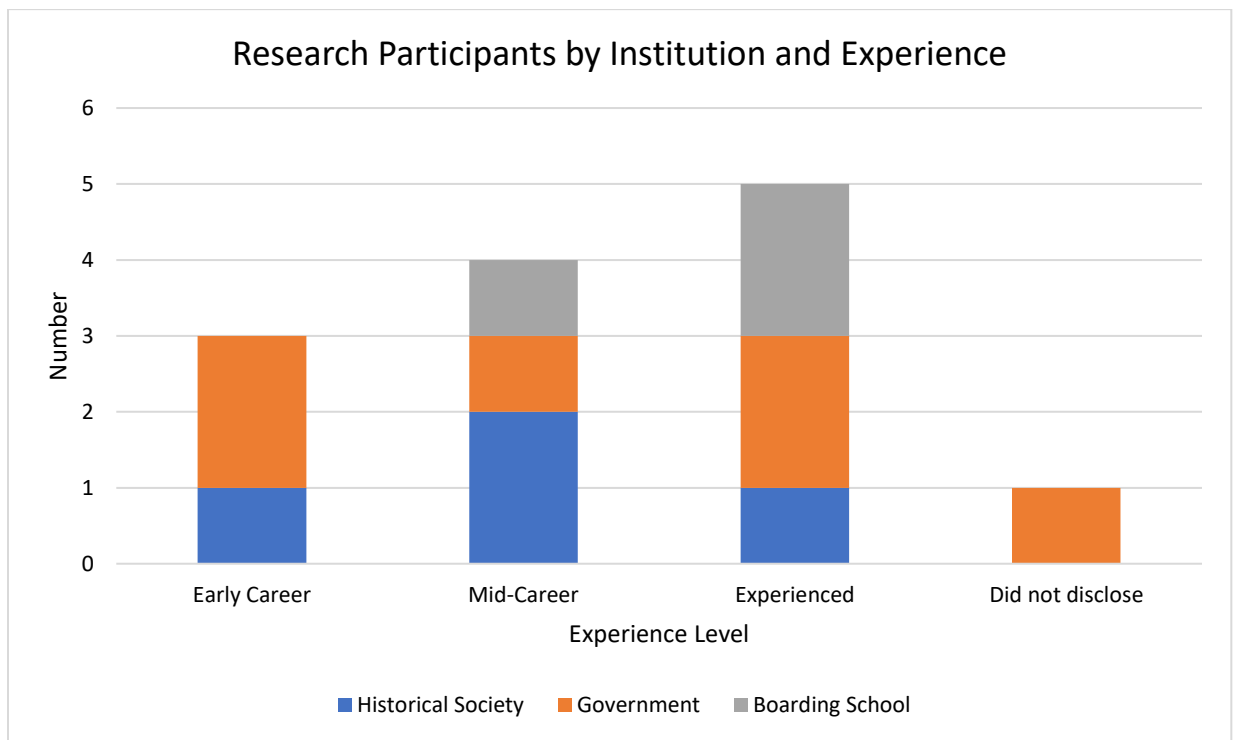


Figure 1: Research Participants by Institution and Experience¹

¹ The total of this figure is 13, counting one participant's experience in two different types of institutions at different periods in their career.

With regard to demographics, my interviews contained no questions about gender, race, or ethnicity. It is notable, however, that, at least amongst participants who included personal pronouns in their email signature, Zoom screen, or a professional page online, all participants self-identified as women. As evidenced by the 2004 Archives Census, the archival field as a whole was about 65% female.² As this is being written in 2022, an updated A-Census II is under production, which may reveal a shift in demographics. While it is not surprising that the majority of participants were women, considering the historic association of archives, librarians, and teachers as feminine professions,³ it was surprising to me that all were. While this sample does not represent the entire field – as a teaching archivist myself who identifies as male, I can personally attest to that – it does re-enforce the unequal demographic representation that exists for archivists as a whole and for those with teaching duties.

While a few participants were leaders of departments, either with staff reporting to them or as lone arrangers, the majority indicated that they were part of a team, and/or that they reported to a head of department. This implies that teaching typically falls under the day-to-day work of archivists who are not department heads or members of leadership. As I will address in my discussion, the demographics of my participants may suggest that there is a relationship between gender and teaching duties: women may have more teaching duties, and fewer leadership or management duties. A larger or more quantitative study might reveal starker between these factors.

² Victoria Irons Walch, Nancy Beaumont, Elizabeth Yakel, Jeannette Bastian, Nancy Zimmerman, Susan Davis, Anne Diffendal, “A*CENSUS (Archival Census and Education Needs Survey in the United States),” *American Archivist* 69, no. 2 (2006), 334-335.

³ See, for example, Marie L. Radford and Gary P. Radford, “Power, Knowledge, and Fear: Feminism, Foucault, and the Stereotype of the Female Librarian,” *Library Quarterly* 63, no. 3 (July 1997), 250-266 and Gina Schlesselman-Tarango, “The Legacy of Lady Bountiful: White Women in the Library,” *Library Trends* 64, no. 4 (Spring 2016), 667-686.

When analyzing the interviews, I took a constructivist grounded theory approach, looking for patterns or groupings in the responses to draw broader conclusions from the collection of personal experiences. The first step of analysis consisted of open coding of interviews. After all interviews received a set of open codes, I compiled these codes into a code-book and consolidated and simplified codes that were similar or near similar. I then used these codes to conduct a focused coding of all interview transcripts to complete analysis of my data set.

It is worth acknowledging that the participants who volunteered for this study already were members of established teaching programs of a variety of sizes. By the nature of the recruiting method, this left out archivists who were just starting teaching programs, or who had programs that were suffering or discontinued. These archivists may not have responded out of uncertainty or a desire to discuss success rather than struggle. This also left out those archivists whose leadership did not approve teaching programs yet who still had plans for programs. All of these perspectives would likely present a different depiction of the state of teaching in the archives. However, I do maintain that the cross-section of archivists that agreed to this study presented a reasonable depiction of established and successful teaching programs among their institutions.

3.4 Summary

This project utilized a constructivist grounded theory approach to conduct semi-structured, qualitative interviews with archivists teaching outside of universities. I gathered my research subjects through three forums: the MARAC caucus listservs, the TPS Collective listserv, and direct reach-outs recommended by my advisors. Each interview was conducted remotely, recorded, and transcribed, unless an interview subject declined for the interview to be

recorded. All subjects had the opportunity to review and amend the transcript of the interview for accuracy and anonymization. The total data set at the end consisted of 12 interviews, perfectly within the goal of 10-15 interviews. I then performed open coding of the interview transcripts followed by more focused coding once I had compiled a codebook based upon the results of open coding. The interview transcripts, along with my focused coding, comprised the data set for this project, creating a reasonable depiction of established and successful teaching programs within the three types of institutions within this study.

Chapter 4: Findings

In this chapter, I discuss the major findings of this research based on key themes that emerged from interviews. Major findings include, first, that institutions are increasingly recognizing the importance of teaching in their archives and encouraging the development or expansion of teaching programs.

Second, the variety of institutions in which archivists outside of universities must teach creates a user base that is much wider than that of university archivists. These different audiences require a variety of teaching methods and ways of forming teaching partnerships.

Third, archivists outside of universities have made a major shift towards using active learning methods. This does not mean that the passive methods have gone away, and participants report that passive methods maintain a place of use under special circumstances. This included a resurgence during the COVID-19 pandemic and use more generally with adult and lifelong learner groups, which are seen far less frequently in university libraries.

Fourth, despite the acceptance of teaching as a central duty of the field, there remain archivists reluctant to teach or reluctant to embrace active learning. This likely comes from a lack of preparation in library and information science (LIS) programs, which forces archivists to turn elsewhere to prepare for this part of their jobs. These include colleagues in the archival profession and the wider field of galleries, libraries, archives, and museums (GLAMs) or to teaching work in prior roles where applicable.

4.1 Institutional Contexts

The three types of organizations represented in this study were historical societies, government archives, and boarding schools. The variety of institutions that the archivists in this

study come from also have a variety of leadership structures. Some of the participants reported leadership that was very interested in teaching and explicitly mandated a teaching program. Other leaders were not librarians or archivists and were distant, uninformed, and largely uninterested in the archives. On the whole, more and more organizations recognized the role their archives had to play, particularly in teaching, and encouraged or demanded teaching programs or more collaboration between departments for the purpose of teaching. The respondents to this study reported approximately the same number of participants who fully expected to teach in their positions when they began and those for whom teaching was a “bonus” or extra part of their positions.

Several of the research subjects drew a distinction between their own institutions and that of a university where there was a defined teaching mission that encouraged such activity. P1 worked in a historical society with both full archival and museum education departments. They credited the latter department for inspiring their use of several active learning methods. Another participant from a historical society, P4, reported that their leadership’s philosophy had begun to evolve enough that the institution was bringing previously separate education and archives departments into closer collaboration. Prior to this change, P4 described their leadership’s perception of teaching as “welcomed and appreciated,” but ultimately ranked “thirdly or fourthly” in their list of expectations. After the change, there was less confusion about the role of both departments in teaching because both departments played a part. They also reported more acceptance in welcoming in K-12 audiences rather than exclusively adult learners.

As a contrast to these experiences, a not-insignificant minority of participants reported that their administrators were not librarians or archivists and largely remained indifferent to the archives. These participants took it upon themselves to start or maintain a teaching

program. This proved particularly prominent among government archivists. P9, as a member of a government archive, believed their leadership viewed the archive as “just like the Department of Education” – that is – as just another department within a bureaucracy. With regards to an archival teaching program, they reported that their leadership had no expectation of teaching nor experienced any pressure to do so. This also meant that there was neither concern for measuring its success nor understanding of its effectiveness within leadership. They also contrasted this with their prior experience at a university library, where education was the entire function. This participant never had to make education a priority, but also never had the experience of their institution preventing their teaching initiatives. While interested leadership was desired, they were able to take advantage of a relatively free hand – a situation not everybody has – to make teaching a priority.

A bigger challenge than unconcerned leadership was a leadership that did not have a clear idea of what teaching entailed. P8 noted that their administrators were not librarians, but were instead elected or appointed government positions. This participant had expected to teach and even was surprised at the high percentage of time they were teaching, but also felt that their biggest challenge was “institutional support of the time and effort that goes into outreach programming.” They did optimistically state that their situation was beginning to change thanks to a recorded catalog of lessons created during the pandemic that provided “something concrete that we can show people that is the content of our programming.” For this participant, providing something that could make their leadership understand the nature of teaching and take a greater interest was a way of advancing the program.

Boarding schools fell into their own unique place and institutional context. The research subjects who taught in boarding schools largely described an experience that resembled that of

teaching archivists in university settings as described in the literature. This included working with a built-in, clear, and limited audiences of students with teachers available as ready teaching partners. In contrast to other K-12 schools, boarding schools often had the financial resources for an institutional or special collections archive with a dedicated archivist, which allowed convenient primary source access in an archival setting rather than through publication or reproduction.

Some of the participants from boarding schools directly related their experience to that of a university archivist. P3 attested to the similarity between their experience at a boarding school and a previous position at a university, saying “what I’ve established is that this school really has the scope and size of different types of collections as a small four-year liberal arts college.” The three participants from boarding schools happened to share the experience that they were the archivists who started the teaching programs at their institutions. They used this new position to entrench the importance of the archives to the institution by actively making it part of the teaching infrastructure. P2 attested that they did not know the increased role allowed the archives to “[become] more of an information resource than just kind of that outreach with the fun ephemeral stuff.” The fact that each of the subjects from boarding schools began the archival teaching program – in the case of P6, being the first professional archivist at all – pointed to this type of educational effort being a relatively new phenomenon in this setting. Although the materials themselves may have existed, a boarding school possessing a formal and professional archive, with all the capacities that go with it, shows a new step in the field. The archival programs were far younger, but from the outset of their creation, were being tasked by leadership to incorporate themselves into the teaching curriculum. From the outset, the collections were

being used in the teaching strategies of their institution, and, as P2 said, “it’s a way to justify your existence.”

4.2 Teaching Partnerships and Audiences

The fact that a university special collections has a very specific primary user base for teaching provides a clear counterpoint to the wider user base of a government or historical society archives. There are examples in the literature of university libraries hosting K-12 and various community groups. Michelle Visser offered her own experience with school groups and various children’s groups before going into a list of the subjects that she taught for them. The survey results that she sent to ACRL members indicated that, while a majority of respondents did host K-12 groups, the numbers were very low compared to those provided for university students.¹ It is also interesting that Visser’s study did not go into detail on exactly whether the teaching methods were the same or if the teaching archivist made adjustments to their usual teaching methods.

The participants in this study, as a contrast to those of university archivists, described routinely needing to teach a wide range of age groups and interests. With the different interests and ultimate goals of these groups – let alone whether or not there was a guiding figure or educational partner coordinating the visit – the archivists described the need to adjust to differing objectives and be innovative in their teaching. Seven participants discussed the need for them to teach a wide range of age groups and groups of varying interests. These typically included more

¹ Michelle Visser, "Perspectives on... Special Collections at ARL Libraries and K-12 Outreach: Current Trends," *Journal of Academic Librarianship* 32, no. 3 (2006), 313-315.

traditional learning groups, such as K-12 or undergraduate/graduate students, but also extended to adult learners, local genealogy groups, other community interest groups, and volunteers.

A recurring theme of the archival literature is for archivists to be active in searching for new teaching partners. Sonia Yaco, Caroline Brown, and Lee Konrad posit, in the university context, that “librarians and archivists have the most success matching collections to courses when they have built individual relationships with professors, becoming familiar with course content,” and placed the onus back onto the librarian/archivist to actively form these partnerships, advising them to “reach out to as many faculty and departments as possible.”²

While this study in no way is trying to discourage such active outreach, several research subjects in this study spoke of the role of word-of-mouth outreach in attracting new teaching partnerships. These testimonies came from archivists employed in a variety of institutions and for the most part did not seem to view this as a negative or an aspect of their teaching programs that they had any intention of changing. P12 used talks, lectures, and reference interviews as a springboard for teaching relationships, attributing most of their teaching partnerships to “word-of-mouth I think because I don’t really formally advertise or anything like that.” P7 attributed their ability to use word-of-mouth advertisement to build teaching partnerships to being a part of a small town, which meant that news was able to travel quickly and important events were widely known, allowing different schools and institutions to offer their assistance easily.

Just as university archivists build consistent and recurring partnerships, archivists at other institutions also build up their own network of longstanding partnerships, which they grow to rely on as consistent teaching partners. P8 had a longstanding agreement with a remote library science program at a nearby university as a government archive, while P10 had similar

² Sonia Yaco, Caroline Brown, and Lee Konrad, “Linking Special Collections to Classrooms: A Curriculum-to-Collection Crosswalk,” *American Archivist* 79, no. 2 (2016), 418.

longstanding partnerships with various genealogy groups, also as a government archive. P7, a regional historical society, used the regional fair as a longstanding yearly showcase to be a consistent presence in the community and provide educational opportunities, and P5 pointed out the benefits of recurring teaching partnerships because they provided opportunities for feedback and fine-tuning of assignments and activities.

Regardless of the way that the teaching partnership formed, a recurring theme among the research subjects in relation to their teaching partners – and, per the literature, with their university counterparts – was the need among archivists for their teaching partners to put in the work as active partners. P7 noted that an archivist must work with a teacher to ensure that the needs and wants of all parties are being met and advised that archivists should, “definitely talk to whoever is organizing your program. Find out exactly what they want, and that might require pulling a few teeth to get at it because sometimes they simply don’t know.” This implies that teachers themselves must have a certain amount of education about the collection or the institution prior to any structured educational session. This corresponds to Kathryn Matheny’s assessment of university archivists and professors namely, “faculty may be unaware of the archives’ educational role and services, they may not understand that their students need in the way of support, and they may not present the requests clearly.”³

Having a path of communication with a teaching partner was a way to not only run an effective teaching session but a measure of self-protection. P11 believed communication was a way to avoid exploitation on the part of an archivist by a teaching partner. If an instruction session was going to be mutually beneficial, then this pathway would prevent it from becoming, as they phrased it, “Babysitting.” Their worry derived both from personal experience and from a

³ Kathryn G. Matheny, “Instruction Consultation for Archives Visits: Why No One Talks About It, and Why They Should,” *American Archivist* 82, no. 2 (2019), 488.

recurring trend in university libraries, where a professor would use librarians and archivists as an ineffective substitute.⁴ Alongside this concern, P1 placed the onus for working with teachers and professors on the teachers themselves to learn about the collections before a session or partnership. They described their preferred scenario as, “when I collaborate with teachers and create a custom program that fits into the scope of their particular curriculum, ideally, I will have had at least one and sometimes multiple encounters with the educator in advance in order to shape a learning experience for the students in the archives.” This created something more than a babysitting session, but a true educational partnership.

Many participants seemed perfectly content with the current status of their teaching partnerships which formed through word-of-mouth promotion or long-standing relationships. This is not to say that this was a universal position, and some research subjects did express a desire to actively reach out to teaching partners. P1 described a present scenario where word-of-mouth amongst regional K-12 teachers was the primary way in which teaching partnerships are formed. At the same time, they also described the desire to be a more active creator in teaching partnerships:

I think one of the biggest challenges is just not having enough resources to be proactive. I think just because of the great work that our learning team does and just the nature of the fact that having worked at my organization for eight-and-a half years, there are just organically relationships that have arisen that have resulted in educational programs. I think that, in many ways, we’re pretty reactive, meaning we do a really good job of handling the requests that come in to us. What I would like to see us do more of is being proactive and really seeking out and stoking those kinds of opportunities with teachers and with students that maybe either don’t have the awareness or the resources or the time to think about approaching us.

At the end of the day, the challenges of reaching out did not merit a departure from a program that had great success with its longstanding partner development.

⁴ See, for example, Jill Markgraf, Kate Hinnant, Eric Jennings, and Hans Kishel, *Maximizing the One-Shot: Connecting Library Instruction with the Curriculum* (Lanham, MD: Rowan & Littlefield, 2016), 7.

There were also a minority of participants who were dissuading teaching partners from their own institutions and directing them to other institutions that could serve geographic or thematic interests. P11 described a scenario where they had to actually decrease their teaching level due to the number of requests their institution received. Even with a large staff – which included staff who were exclusively tasked with teaching – they utilized their own network of institutions to redirect teaching partners to other institutions who could handle the casework of more teaching sessions. This was an anomaly among the responses, made even more so by the staff size at their institution. Although it does not appear to be the norm, based on this set of participants, I include it as an example of a plausible state for a teaching program to be in and a way to work with teaching partners to benefit a partnership.

In regard to partnerships, boarding schools again have a different experience from other non-university institutions, one that more closely resembles universities. This subgroup described a mixture of deliberate advertisement of their services for teaching and a reliance on networking and word-of-mouth. P2 used their platform at the new faculty orientation to ensure that “new teachers and staff hear about the archives.” This was supplemented by continued reaching out over time. These active efforts to find partners was done in addition to reliance on networking, word-of-mouth, and reliance on longstanding partners. P6 stated that one of the benefits of being a boarding school was an increased ability to network with partners, saying “the faculty live on campus and get free food. And so, I feel like I have made some really incredible networking connections by just eating at lunch and talking to people.” The boarding school as an institution opened up more avenues for all possibilities of finding potential teaching partners.

4.3 The Content of the Lessons

With regards to the actual content of the lessons, the participants in this study expressed a desire to expand the use of their collection beyond their traditional subject areas. The subject that participants taught or partnered with the most was history. This was another similarity with their university counterparts, as was the attempt to show the use of archival in a wider range of subjects.⁵ Occasionally, English courses were included in this “default” grouping (P2, P3), as well as courses in foreign languages (P2, P6). Four participants described attempts to expand their teaching partnerships beyond their respective history departments (P2, P3, P6, P7). P7 discussed the most extensive attempts to branch into other subjects, such as finding ways for lessons to take place safely outdoors as a COVID-safety measure. By creating lessons in math and physical science that could occur with replica documents outdoors, they were able to get children to interact in-person and away from screens for at least an afternoon. This participant was one of the few in this survey to increase their teaching load during the peak of the pandemic.

A number of participants also discussed their attempts to present programming and lessons that reflect a more diverse range of individuals and experiences (P1, P2, P7, P9, P12). These often involved highlighting materials by or about people of color when possible. Some participants undertook these efforts even when it was politically difficult or in highly colonialist institutions. P7 placed their attempts within the wider GLAM field to move beyond the European settler narrative and “to branch up from that and tell a much fuller story of the

⁵ Cinda Nofziger, “More than Managing a Calendar: Reflections on the Role of an Academic Archivist,” in *Teaching Undergraduates with Archives*, ed. Nancy Bartlett, Elizabeth Gadelha, and Cinda Nofziger (Ann Arbor, MI: Maize Books, 2019), 86-106; Joshua Youngblood, “Oh, It’s You Again: Increasing Archival Instruction through Sustainable Relationships,” in *Teaching Undergraduates with Archives*, ed. Nancy Bartlett, Elizabeth Gadelha, and Cinda Nofziger (Ann Arbor, MI: Maize Books, 2019), 113-29.

[region].” P1 expanded this to the students that they taught as well, describing an ideal scenario where:

Learning opportunities are available for groups of students who have been and are historically marginalized. I think it looks like having groups of students with disabilities and BIPOC students coming in and having rich, meaningful experiences in the archives in which they see themselves reflected, not only in the records, but also in the archivists who are facilitating those experiences.

Alongside the attempts to expand their teaching partnerships and show the strength and use of the collections beyond the history field, these show that archivists outside of universities trying to diversify their audiences alongside their colleagues across the spectrum of the GLAM institutions.

4.4 The Use of Passive Learning

Despite the shift in the field away from passive teaching methods, eight participants discussed utilization of passive teaching methods such as tours and show-and-tells, either as a routine part of pedagogy or as something done under special circumstances. This indicates some level of retainment – happily or begrudgingly – of passive teaching methods within the profession and in non-university institutions. Sometimes descriptions of both active and passive methods appeared in the same interview, even from archivists who otherwise spoke negatively about passive learning methods. The negativity was not universal, however, and there were places where the interviewees indicate a desired balance, at least for themselves, has been reached between the two methods.

As part of their teaching methodology, participants in this study described some of the methods and instances where they used methods that could be considered “passive.” In some instances, archivists in these institutions conducted sessions that focus on locating information,

as P4 phrased it, “like in academic libraries.” Three interview subjects discussed holding workshops that consisted of lectures, locating materials, and accessing resources of the institution. Prior to the COVID-19 pandemic, these were largely conducted in-person. P4 utilized show-and-tell sessions when partnering with classes that had a special subject interest. P5 described their public programming initiative being targeted toward “the general public, researchers, groups that come to archives,” and “[took] the form of presentations accompanied by a PowerPoint, but back [before the pandemic], it was also an opportunity to tour people around our space.” P10 created presentations on searching for certain topics, particularly genealogical records, for various interest groups, which largely consisted of lecture-based presentations along with a question-and-answer period.

Despite some passive methods, some of the archivists also clearly attempted to incorporate a level of interactivity into passive sessions. These instances saw the participants trying to innovate and move the sessions in a more active direction. When running sessions for genealogists about resources such as Ancestry.com, P4 largely utilizing lectures, but also tried to provide time to let learners experiment with their own searches. When discussing their teaching with undergraduate students, this same participant discussed some of their highly active learning projects, such as creating exhibits in a long-term project or in “building a narrative” activities. It would be a mistake to say that P4 was not in favor of using active learning, and they attested that they used it frequently with university students. It was when they taught students outside of traditional education structures that they were still experimenting with the best way to utilize active learning, working on a shifting of teaching methods in the meantime.

Even though there was a sense of contentment among some participants with their use of passive methods, others who used them under certain circumstances expressed some discontent

and showed a desire to continue to shift towards more active methods. P5 described teaching sessions in which they utilized passive methods, but allowed users to experiment with search terms when it came to teaching them how to use certain search tools. They expressed a clear belief that their prior methods were not active or participatory enough, saying “There was a time when I felt like we were giving a lot of [tours] and I just think it didn’t make me want to keep doing it in the same way that like working on kind of more in-depth presentations and such does.” Although the use of the term “presentation” here could imply merely additional passive teaching methods, their goal was a higher level of audience engagement that was not met when conducting a large number of tours with little else in a structured teaching session. P5, like P4 earlier, was basing their sessions around a passive delivery method while attempting to move them in a more active direction with all audiences.

There did emerge some distinctions between the different types of institutions within this study and the ways that they formed partnerships. Archivists in government and historical societies had the unique role of teaching sessions of adult learners. These sessions did not necessarily have a leader or authority figure comparable to a teacher or a professor and did not have assignments in the same way as a more traditional “students” did. They may have a theme or goal, such as a project or long-term duty, but it did not take the form of an academic task that received a grade. This changed the way that participants interacted with adult learners and community groups, which often resulted in the incorporation of more passive methods. P3 cited a difference among these adult learners in the fact that they were willingly attending classes that this participant organized, rather than attending because they were required to. This created an entirely different motivation for learners. These sessions focused on information finding, and seemingly utilized significant amounts of presentation methods. Despite the negative reputation

of passive teaching methods and presentations, P3's appraisal of the sessions was highly positive, saying, "They were into it. They loved it. They'd have to, they were volunteers, and they wanted to be there." This contrasted with their significantly more mixed experience of teaching sessions at a university: "Some of the students were into it, and some of them were not. Some of them were a lot more difficult to teach compared to the genealogists."

Boarding schools also shared the role of university archives in that they double as both a special collections and an institutional repository. This gave them a second audience of adult learners with significantly different goals and needs for their own education. Despite having a clear impetus and attesting to the support that they received to teach in the archives, P3 described the administrative audience that they had to work with and educate about the role of an archive. They described this type of teaching as having a significantly different goal than courses on information or archival literacy, yet still clearly identified it as an education initiative. The most effective method that P3 described in these efforts included an emphasis on datapoints and quantitative statistics, such as "How many hours did it take for how many people to process what type of collection." With regard to these learners, P3 also utilized a blog as an educational tool in order to present archival workflows. This audience was an outlier mentioned amongst these participants, but nonetheless one which related to this type of institution specifically and reflected the range of audiences that teaching archivists must work with.

One of the most essential pieces of active learning in constructivist teaching is the use of a formalized method of assessment. Magia G. Krause found that teaching archivists in universities had widespread dedication to active learning with undergraduates, yet used little formal evaluation. Instead, archivists primarily used faculty returning as their measure of

success.⁶ The research subjects in this study almost unanimously did not use formalized methods in their teaching sessions, and, although that does not make them “passive,” it does show a continued place of divergence from the recommended literature of the educational and archival fields. However, this is a place where the formal archival literature continues to address the divergence in theory and practice, and thus, non-university archivists do not diverge too far from those of the universities.

While I did not include any questions about assessments, eight participants discussed how they measured success of a teaching session in the course of discussing their methods. Four participants used the measurement of students returning after the session (P1, P5, P7, P8). P1’s institution collected qualitative evaluations alongside this more informal assessment, but also admitted that they were not completely satisfied with this assessment method. No other research subject mentioned collecting data, whether qualitative or quantitative, in any way. In addition to this, P1 also cited teachers organically reaching out to them for future sessions as a measure of success, seeing this as education partners being satisfied with how things went enough to encourage others to do the same. P3 measured success in the long term not only by students returning to the archives for reference interactions, but also to faculty, alumni, and administration doing the same. P10 measured their own success by researcher satisfaction in the aftermath of the teaching session, which is perhaps a more concrete, yet still largely informal measurement tool of assessment.

Two participants spoke more generally about the difference between assessment in the archives versus a traditional classroom. P4 discussed the issue of assessment in general, contrasting the classroom teachers who had “more riding on assessment” with the teaching

⁶ Magia G. Krause, “‘It Makes History Alive for Them’: The Role of Archivists and Special Collections Librarians in Instructing Undergraduates,” *Journal of Academic Librarianship* 36, no. 5 (2010), 406-8.

archivists who had much more collaborative goals. Although P4 was thinking about whether lesson objectives were met, they considered the end result not their own, but that of the teacher with whom they had partnered for the session. P12 cast the notion of assessment in general as restricting, preferring what they called “real evaluation.” They described the letter grades of a traditional classroom as constricting and created a perception, in their view, of a negative “be-all-end-all to their life’s trajectory and meaning.” They viewed this overly formal assessment as disconnected from whether the content was relevant in a student’s life. Instead, P12 preferred a method of assessment that came in a pass/fail situation “because [they] kind of think that [they] want students to be able to use the material now, in the medium-term future, and [they] want them to have it at their fingertips for new applications down the road.” Their understanding of assessment was practical and lasting, rather than short-term and utilitarian, and certainly far less formal.

4.5 The Use of Active Learning

Passive learning methods have persisted in their use amongst many of the participants of this study, but the overwhelming majority described the utilization of active learning methods in the majority of the sessions and instances that they described. Furthermore, the general depiction of the field that came from these interviews showed teaching shifting more and more away from the methods of passive learning toward increased utilization of active learning. Nine of the twelve interviews explicitly mentioned a teaching methodology that included active

learning. Typically, these involved learning objectives that presented some goal of the teaching session or project, usually with some limit in scope.⁷

Participants in this study described a number of active learning activities that they conducted in their teaching, from the very simple to the very elaborate. As an example of an active learning exercise on the simpler end, P5 provided sample boxes of documents to a genealogical interest group so that students could practice and complete searches that may not have had the most intuitive searching strategies. As another example, P7 utilized historical photographs and maps of the regional landscape that K-12 students were familiar with in order to actively practice mapping and geography skills. On the more complex end, P1 used excerpts from historical sources and pieces of an image of that person. The students were tasked with piecing both the historical document and the image of the person back together, incorporating an artistic component into their students' learning.

P7 also addressed the way they that taught differently when addressing adult groups. Coming from a regional history museum, they occasionally utilized traditional presentations and lectures with adult learners and did not typically offer active learning sessions with distinct learning outcomes for adults. Through teaching within a museum setting, P7 was able to utilize exhibits both within the walls of the museum and through pop-up displays at regional events. By their own admission, the archivists at their institution “[didn’t] actually do too much adult specific programming.” Although it may not fall under their definition of “programming,” P7 went on to describe how they utilized discussion as an educational tool in and of itself with adult learners, ones which may not fall under traditional active learning

⁷ Char Booth, *Reflective Teaching, Effective Learning: Instruction Literacy for Library Educators* (Chicago: American Library Association, 2010), 39-40; Candice M. Benjes-Small and Rebecca K. Miller, *The New Instruction Librarian: A Workbook for Trainers and Learners* (Chicago: ALA Editions, 2017), 55.

definitions, but nonetheless engaged and made learners active participants in constructing their own understanding. For example, they described a certain type of educational scenario where, “when we go into like the seniors’ homes, there’s a lot more conversation and dialogue and I’ll bring something, a collection of photos or objects on a theme and just let the conversation go.” Their exhibits helped fulfill their role of adult education as well, yet kept it “very, very informal. [Visitors] come, they take what they want from it, and then we’re there as either interpreters in the gallery or as speakers, facilitators, whatever. And it usually does morph into more of a facilitating role than speaking role.” These methods with adult learners may not be traditionally active, yet they clearly showed the classroom engaging with the records and documents in a way that was far from passive.

4.6 Changes in Teaching Due to COVID

When the COVID-19 pandemic began and programming went exclusively remote, it forced most archivists to provide some level of virtual service, often for the first time. Since March 2020, there has been a major shift in both work and education, where many employees not deemed “essential” were asked or forced to find ways to work from home. This closed reading rooms, sent K-12 and university students home, and stopped adult interest groups from meeting in-person. Many archivists were forced to make decisions about their teaching programs, based upon their abilities, equipment, and priorities. Many institutions made the decision to continue their teaching programs in a virtual or remote manner; others chose to suspend their teaching program completely. Every interview for this study included at least one question about the state of the participants’ teaching programs after the start of the pandemic. At this stage, I cannot say whether the changes described by my participants bear a similarity to

changes that have taken place in universities since the start of the pandemic, as the formal academic literature on the matter is only beginning to be published.

The time of exclusively remote programming gave several institutions the opportunity to compare and contrast education methods that they conducted in the virtual world with those of the physical world. The first change that subjects discussed was a decrease in teaching load, at least initially. P4 “ran a few tutorials on digital collection and provided resources and source lists,” but also believed that they could have done more extensive virtual programming had they been in their position for a longer period of time prior to the pandemic in order to better learn the collections or to create more teaching partnerships. P8 highlighted the difficulty of including interactivity into virtual teaching, describing the methodology and problems as “the class is live and it’s recorded, but we only have questions and answers at the end where people can type the question that goes through a moderator, which is a little bit more limited.” In contrast to the ability of some instructors to create instructive discussion amongst in-person audiences, particularly with adult learners, they felt that the virtual discussion board did not create the same sense of visible engagement.

Others were forced to utilize more presentations in their teaching rather than more active learning methods. P2 was asked to give a talk on a specialized subject related to the history of the boarding school where they are the archivist during a virtual “upper school” assembly. This teaching effort consisted of a PowerPoint and lecture presentation to the entire school. Despite this being within the “sage on the stage,” tradition of teaching, P2 described it as “a good way to lift up the archives.” Particularly during the time of the COVID-19 pandemic when the school and archives had otherwise limited in-person activities, P2 said of the experience that “I was glad to be asked because then the archives had a presence.” They did, however, give the impression

that this was a condolence prize during the pandemic for students who were otherwise unable to utilize the collections in more active ways.

P9's assessment of virtual teaching was decidedly mixed. This participant had difficulty conducting virtual learning sessions and acknowledged the reality that "Zoom is not as fulfilling" and had difficulty in "really show[ing] materials or facilities to museum studies classes." In general, their impression of online teaching was that there was "a big rejection of MOOCs [massive open online courses] – We've all learned it sucks." At the same time, they also acknowledged that online and virtual learning allowed their institution to reach groups in new geographic areas, particularly high school history courses from schools too far away to make the trip to the institution in-person. They described a similar result with genealogical groups, which they felt had made many older genealogists, out of necessity, less technologically skittish, and, despite the difficulty, believed that sessions with genealogists had incorporated activities well.

Trying to process the benefits and drawbacks of this tradeoff for the future of teaching was a common theme amongst interviews with regards to this subject. Despite sharing the concerns that virtual learning made it difficult to gauge audience reaction, limited organic conversation, and prevented adjustment of lesson plans, P10 did note that their catalog of recorded lectures has grown significantly faster than it would have otherwise. This provided a certain convenience to the lessons for students, as the lessons were accessible asynchronously, at any time and any place. P5, an archivist at a local government archive, also noted the convenience of this aspect of COVID-induced lockdowns and closures, particularly as the recorded videos become a convenient way to educate a leadership who were not necessarily librarians about what the archives was doing, helping correct a longstanding tension amongst the

archival staff. Even if the lessons did not have the active learning aspects that they preferred, they were able to create a wider footprint to benefit learners.

P11's experiences with virtual learning were similar to P10's. Although they were careful to give the caveat that they did not feel comfortable assessing the level of success or failure of virtual teaching at their institution, they noted that the numbers of attendees at programs had skyrocketed. Over the course of the shift to virtual learning, they worked with the IT team "to make use of the technology." They shifted from holding discussions and Q&A segments to holding poster sessions to providing resources and packages for teachers. This harkens back to the tradition that Anne Gilliland-Swetland proposed back in 1998 of teaching through working with schools and teachers to provide lesson packages, alongside lesson plans for activities in local classrooms using documents from the institution's archive.⁸ This has combined with the modern method of teaching with library blogs as an education tool. In this way, P11 felt confident that many of the hybrid techniques will continue long after the pandemic, seeing great success in incorporating active learning methods creatively in a remote environment.

Finally, in a generally positive assessment of the virtual teaching experience, P12 addressed some of the procedural shifts that needed to take place in a fully virtual environment. Their methods achieved the goal of keeping lessons active, maintaining the benefits of their success teaching in-person in the past with the expanded geographical reach of the virtual world. Although they also had difficulty gauging reactions to lessons through remote learning, they were able to make that translation. By providing the documents ahead of time, in the form of "clue packets, the informational things that people might need in terms of URLs, to

⁸ Anne Gilliland-Swetland, "An Exploration of K-12 User Needs for Digital Primary Source Materials," *American Archivist* 61, no. 1 (1998): 137.

scans of primary documents or links, to .wav files for students to listen to,” they were able to continue their preferred interactive techniques, such as one-minute papers or think-pair-shares. Despite the learning curve to the procedures, they also said that once a session or resource was created it could be reused, making the process easier for the future.

4.7 Cultures of Acceptance and Resistance

A number of participants reported a sense that some colleagues or institutions were reluctant or indifferent to teaching in the archives. Four of the twelve participants reported hesitation or outright resistance to teaching amongst their colleagues. While there are certainly archivists in universities who share this reluctance – or perhaps even universities themselves who believe teaching is not part of the archives’ function – the relative newness of this role outside universities makes this both more expected and more symbolic of teaching in a transitional phase.

Each participant was asked the biggest challenge they face teaching. The first answer P4 gave in response to the question of their biggest challenge in teaching was “getting buy-in from the team,” attributing this to a sense that teaching was a low priority at a historical society. P9 was able to use the executive authority of their position to mandate a shift among the rest of their staff toward active learning as the primary teaching philosophy of their institution, alongside an expansion of teaching efforts to undergraduate students. This was a distinctly new era in their institution, which had exclusively used passive learning methods such as presentations with a very limited target audience of genealogical groups. With a staff who had not been trained in active learning methods, the participant attested that, while there was no resistance, they did encounter “some confusion initially at the need for such a change.”

Other participants described similar experiences of staff not quite understanding the need or reasoning of a shift toward active learning. With regard to their institutional investment in providing teaching resources to teachers, P11 said that, “there are still people who don’t understand why we are teaching teachers. They don’t understand why we drop the age for use to [age] for some of the reading rooms.” This participant speculated that this came from a belief that the institution was for scholars and admitted that the push to move the institution toward a resource for teachers and wider K-12 use had only begun under recent administrators. P12 attributed a similar experience at their institution to an ideological shift from a group of new hires who arrived around the same time period and encountering professional conflict with an old guard of staff who never held teaching duties.

Contrary to some of my expectations and to those beliefs of P12, my research did not show a clear relationship between embracing or resisting active learning and experience in the field. Six of the archivists in some way explicitly stated their opposition to passive learning methods like show-and-tell, with three who were mid-career and three who were experienced in their careers. This, as stated previously, does not mean that many of them do not ever employ passive learning methods; many attest to both being opposed to and utilizing these passive methods.

P12 gave the most explicit denunciation of passive teaching methods. They were one of the few research subjects who did not indicate use of any passive teaching methods at any point in their current position. Even when teaching partners asked them for a show-and-tell session, P12 stated, “I don’t do it out of principle. Even when someone asks for show-and-tell, I try to infuse it with critical inquiry, some sort of -ism or some sort of application for the students.” When pressed for more information, they responded, “there’s no longitudinal

retention whatsoever. It ends up being a complete and total waste of my time. Period.” In relation to their past experiences, they added, “I’m a librarian, not a museum curator.”

Other research subjects gave more practical rather than ideological explanations for their resistance to show-and-tells and other passive teaching methods. P4 pointed to their experience seeing students getting worn out from one-shot sessions full of show-and-tells. P5 seemed to find the sessions boring for themselves to teach, calling them “transactional in and out.” When pressed on this, they described the situation as, “come on in, have your basic 20-minute tour, go. There was a time when I felt like we were giving a lot of those, and I just think it didn’t make me want to keep doing it in the same way that like working on kind of more in-depth presentations and such does.” P9, despite their own preference for active learning, discussed frequent teaching partners who specifically asked for show-and-tells, and expressed their philosophy as “I tell my staff, your first push is always active learning... and if they push for show-and-tell, you do it because they’re your clients.” In addition to a resistance among archivists, this statement pointed to a continued entrenchment among some members of the teaching profession – or in this case, the professoriate – of some passive methods, either for themselves or as it relates to the archives.

P11 gave the most detailed description of their own pathway to active learning. At their institution, they provided information about the institutional shift that took place:

We did not get started getting into some of the deeper work that we’re doing now until around 2012, ‘13, when the then director realized that we were still being very, very surface about what we were doing and they wanted to go deeper and discuss pedagogy. And that was when how we taught teachers changed dramatically. That’s when we started doing the inquiry process and encouraging deeper, critical thinking and not just using primary sources as an illustration versus using them as a teaching tool.

Although P11 was not there during the transitional years, they have had their own shift in teaching ideology, describing their former style as “a few presentations here and there, but [I] did

not really pick up the teaching hat per se. My colleagues will tell you when I started, I was way more a lecturer than a teacher.” However, because the institution was able to shift, this interview subject was able to rely on colleagues to move toward a more participatory teaching style: “The joke from some of my colleagues is I’m like a fountain or a fire hose. I go ‘tchew’ and just put out tons and tons and tons of information. And my colleagues have forced me to stop a lot more and ask where people are, add some more activities into my presentation, give handouts that allow people to follow along.”

Perhaps it should also not be entirely surprising that a variety of passive methods exist alongside distaste for these same methods. Wendy Duff and Joan Cherry’s research in 2008 into undergraduate orientation at university libraries also encountered a variety of learning methods, active and passive, while also finding that students and professors did want more hands-on and active components to the lesson.⁹ At the same time, the archival community as a whole has undeniably shifted, as Elizabeth Yakel put it, “moving from being an archives’ greatest hits tour guide to an instructor teaching in the archives and engaging students with primary sources.”¹⁰ This is alongside the change “from archival orientation to teaching with primary sources....” which “makes us think about instruction not just as a one-time activity but as a curriculum built around primary sources.”¹¹ That this shift is still happening should perhaps not be surprising, but the forms that it takes certainly may be.

⁹ Wendy Duff and Joan Cherry, “Archival Orientation for Undergraduate Students: An Exploratory Study of Impact,” *American Archivist* 71, no. 2, (Fall/Winter 2008), 499–529.

¹⁰ Elizabeth Yakel, “Teaching Undergraduates with Archives,” in *Teaching Undergraduates with Archives*, ed. Nancy Bartlett, Elizabeth Gadelha, and Cinda Nofziger, (Ann Arbor, MI: Maize Books, 2019), 280.

¹¹ Yakel, “Teaching Undergraduates with Archives,” 283.

4.8 Preparation for Teaching

According to Lindsay Anderberg et. al.'s research (2018) of course catalogs at ALA-accredited programs, only 9 out of 53 programs offered dedicated coursework in teaching.¹² This reflects a need for increased preparation for archivists to teach in their roles. Although their research applied to the entire archival field and not to one set of institutions, the archivists in my study reported that they also had not received training in teaching methods through any library science program. I asked each participant in this study how they have received their training in teaching. Of the 12 participants, four had received formal training as a teacher (P3, P4, P11, P12). P3 taught in an overseas program of an American university. P4 had a Master's in teaching from a career prior to entering the archival field. P11 took courses on teaching, curriculum design, and development through an extended program later in their career. P12 was taught teaching methods over an extended course due to a position as a university writing instructor, who also completed a vast amount of research into educational theory as part of their own educational background. This led them to also work as a teaching consultant and an adjunct professor at various points in their career. Of these interview subjects, two were experienced in their career, one was mid-career, and one early career.

For those without formal training in teaching, four participants (P1, P5, P7, P8) cited gaining teaching experience in prior positions that had assisted them at their current institutions. P1 had worked with younger students as a retreat coordinator in high school and college, but otherwise stated that "I did not have formal training, and that's something that I wish that I would have had more hands-on experience with throughout graduate school." P5 and P8

¹² Lindsay Anderberg, et. al., "Teaching the Teacher: Primary Source Instruction in American and Canadian Archives Graduate Programs," *American Archivist* 81, no. 1 (2018), 200.

had been tour guides at history museums, with P5 crediting that experience with their ability to “adapt for your audience.” P8, like P1, also felt that “I didn’t have the concept of doing K-12 education programming, that sort of thing. That would’ve been something I would’ve definitely gained from more coursework or training.” P7 had tour guide experience as well, and said of the positives and negatives of that preparation:

I can give a speech that will keep people mesmerized; there’s no problem there, but how to deliver in a classroom setting, even in informal classroom settings, like when the class comes here, the teaching methods that are appropriate for different age groups, I don’t know anything about that. I’m learning on the job, but I don’t have any formal training in it.

Amongst these interview subjects, three were mid-career, and one was early in their career in the archival profession. While these types of training are better than no training at all, and several participants even noted positive aspects of their training, there was a sense amongst these participants that receiving formal training in relation to their LIS would have been helpful for them in the immediate and long term. It is also important to point out that these results included the younger ends of the experience spectrum, implying that most archivists are still not receiving formal education in teaching methods in their early training, or that they are receiving it formally only later in their careers. Two participants explicitly stated that they had had no formal training in teaching, one mid-career and one experienced. In the absence of any type of training, both P2 and P6 cited the assistance their teacher partners had provided, which only bolsters the notion that teachers and archivists must be co-equal partners in educational initiatives. Beyond this, all teaching experience was done on the job and with processes of trial-and-error.

There were two other major places that archivists learned about teaching methods that were cited amongst these research subjects. The first was from professional archival

organizations, with the Teaching with Primary Sources (TPS) Collective being the most frequently mentioned by four participants. This group has a stated goal of “[bringing] together resources, professional development and support for those who teach with primary sources, including librarians, archivists, teachers, cultural heritage professionals.”¹³ They hold conferences in conjunction with the annual meeting of the Society of American Archivists, “book clubs,” and host resources for both new and experienced teachers. The second most frequently cited was the Brooklyn Historical Society (BHS), whose archivist also wrote the sole article in the archival literature from the last five years explicitly focused on teaching in a non-university setting, as well as one of two articles in the Case Study Series that was not set in a university.¹⁴ Other groups mentioned by name include the Rare Book and Manuscript Section of the Association of College and Research Libraries, the Reference and Outreach Section of the Society of American Archivists, Project CORA, and a regional archival teaching group. Seven of the 12 participants mentioned one or more of these groups as a significant place where they gained knowledge of teaching methods. Of these seven individuals, two had formal training in teaching in a program from a school of education, two had experience in prior positions, and one had no experience, with two having made no statement as to their training or experience. While these groups provide valuable assistance in the profession, it should be concerning that these groups are being cited in place of, rather than alongside, formal library and information science programs, who have not provided adequate training for teaching archivists.

¹³ “What is the TPS Collective?” TPS Collective, 2022, accessed March 13, 2022, <https://tpscollective.org/>.

¹⁴ 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. 9 (2020), 1-16; Jen Hoyer, Kaitlin Holt, and Julia Palaez, “Crafting a Research Question: Differentiated Teaching for Instruction with Primary Sources Across Diverse Learning Levels,” *Case Studies on Teaching with Primary Sources Series* 4 (September 2018), 1-26.

The second place where participants cited gaining knowledge of teaching methods, particularly among archivists in historical societies and government archives, were their colleagues in the museum education field. P1, who had teaching experience in a prior position but no formal training, went into the most detail about the relationship between the library/archives and museum education teams. They cited their connection with their museum education team as a way of learning effective teaching methods, calling the head of their museum educators, “the one who is really well-respected within the field of museum education, is on the cutting edge of that field, and through collaborating with them, the vast majority of the folks in that division have Master’s in Museum Education and/or come from a traditional teaching background.” They also cited their methods, “to stoke engagement with the primary source I’ve learned from the educators and the members of the learning team,” as well as assisting P1 with other aspects of teaching such as time management.

P4 provided some information on the move at their institution toward a closer collaboration between these departments that seemed to more closely resemble that of P1’s. While previous directors of their institution had kept the library and education departments very siloed, a new director encouraged more active collaboration. By bringing these two departments under one umbrella, educators and librarians were able to build off of each other’s work for different groups and therefore deepen the educational experience they both provided. P8, in the absence of formal training, pointed to the TPS group and to colleagues in the public history world to learn about creating educational experiences, particularly in creating and gauging interest and working with educators. These helped this subject to create a truly active experience rather than provide merely a tour that does not go past, as they phrased it, “Hey, there’s a thing. Look at the thing. The thing is interesting.”

4.9 Summary

The results of this study indicate that active learning has made its way into the teaching methods of non-university archivists, although passive learning methods also remain key tools in these institutions in decreasing use. They had a brief resurgence as archivists navigated the new primarily virtual space created by COVID-19, yet here too archivists began to innovate and discover ways to move towards active learning. While this was sometimes complicated by the variety of audiences and subjects that non-university archivists must teach to, they incorporated different ways in which adult learners and those without a key organizing figure could be actively engaged with archival materials in a teaching and learning environment in ways that met their needs and be engaged in constructivist ways. The variety of organizations in which these archivists taught were also taking an increased interest in the teaching capabilities of the archives by encouraging more teaching programs and placing them in cooperation with other elements of their organization engaged in educational efforts.

There are portions of the teaching experience where non-university archivists maintain practices that do not align with all of the modern recommendations contained in the archival and education literature, yet seem to do so to relatively good effect. Very few archivists in this study had the resources to actively reach out to new teaching partners and instead relied on networking and word-of-mouth to accomplish this task. Given the often wide range of their user-base, to do otherwise seems unachievable. The method of evaluation, where it exists, still remains in the gathering of informal data without formal metrics, a key facet of modern education theory.

Lastly, participants described the ways that they were trained to be teachers. Several received training in prior positions in teaching and others rely on colleagues in the GLAM field, dedicated professional groups such as TPS, or continuing education courses. No participants

received training in library school, which indicates a need for this skillset to become more embedded in the core of archival training.

Chapter 5: Discussion

The results of this study show that archivists outside of universities have largely accepted the tenets of active and constructivist learning, yet are still in the process of implementing these methods and phasing out passive learning. The passive methods still hold sway and even some utility under both normal and abnormal circumstances, such as during the COVID-19 pandemic. Despite the unforeseen challenges of the pandemic and the continuing and foreseen challenges of their institutions, archivists are reaching a wide variety of audiences, ranging from formal classes to the life-long learners that do not form the traditional core of “students.” More institutions are placing an emphasis on teaching or encouraging their archives to accept teaching as part of their role, and other archivists who are not in these institutions are taking that role upon themselves.

At the same time, the study found that archivists are sometimes hesitant to embrace new teaching methods or to teach at all. Several participants pointed to their own desire to learn more about pedagogy and overcome their own training deficits in the subject. The situation that they described shows a need for greater training in constructivist and active teaching methods early in archivists’ careers and in library and information science (LIS) programs. The demographics of this study also point to teaching remaining a highly feminized task in a field that already carries a perception of being feminized. This relates to the divide between day-to-day tasks of the field and those involved in leadership and administration, illustrating some of the long-lasting limitations to equity in the profession.

Finally, the effects of the COVID-19 pandemic on the archives, their users, and on teaching are only beginning to be studied. While the data at this time is limited, the pandemic will certainly have effects for both university and non-university institutions as to what active

and passive methods archivists utilize. It will also cast a shadow over institutional investment into digitization and creating access to digital surrogate records.

5.1 Teaching in Practice

The majority of participants in this study were utilizing active learning methods at least part of the time. Many of the research subjects showed a wish to avoid methods like lectures and show-and-tells, with some participants showing outright antipathy towards these methods. Yet many of these same archivists indicated that they reluctantly or semi-reluctantly used presentations and passive methods when they would have preferred to use active learning. The reasons given for this ranged from the time and effort needed to prepare lessons involving active teaching to professors asking specifically for tours and show-and-tells and refusing to take no for an answer. Others incorporated some discussion but intended to keep using talks and lectures as their primary form of teaching. Particularly with certain groups, such as adult learners with very specific learning goals, these participants seem to believe that their current methods suited their purposes and were content to continue them. These passive methods also appeared far more frequently in virtual sessions during the COVID-19 pandemic, seemingly from their ease of use as long as equipment or digital surrogates were available.

For as much as the constructivist methods have replaced traditional and passive teaching methods, it is difficult to determine whether the resilience of some passive methods should be frowned upon or written off as completely negative without being in the institution and intimately knowing the situation, resources, and culture. If, as in so many other aspects of the archival profession, the perfect is the enemy of the good, then this may very well be the best solution in the best scenario for the institution's purposes. On the other hand, the encountering

of resistance by members of the profession can also point to a retrenchment amongst the archives rather than implementing necessary change.

This resistance hints at a discomfort with claiming the title of “teacher” even for archivists utilizing active methods. For example, P7 described teaching as coming from the structure of sessions such as those done with K-12 students, fundamentally placing their work in exhibitions or adult discussions in a different category than “teacher.” The circumstances in which non-university archivists must teach, because they do not always fit the model of a standard classroom – or even a one-shot session – mean that teaching can sometimes take a more expansive form than one would traditionally picture. In one of the few case studies of teaching outside of universities, Jen Hoyer, Kaitlin Holt, and Julia Palaez point this out as well:

Given the diversity of the students served, the key challenge faced by Brooklyn Connections program educators when teaching...revolves around the complexity of adapting a standard research question lesson to speak to the range of learning styles inherently represented across many grade levels and classroom types.¹

While the results of these surveys point to an accepting and evolving cadre of archivists outside of universities with regards to teaching, there remains the possibility that, just as the established literature is not fully representative of the portion of the field outside of universities, it may not accurately represent the university field either. Suzy Taraba’s case study documented both her and her institution’s shift from passive to active learning over the course of fourteen years, from 1998 to 2012. At the start of this time period, she points out that the field was largely using show-and-tell as teaching, and that by 2012, even while so much teaching in other domains has shifted to active learning, many archival teaching sessions were still being conducted with the passive methods. This case study took place in a university setting and

¹ Jen Hoyer, Kaitlin Holt, and Julia Palaez, “Crafting a Research Question: Differentiated Teaching for Instruction with Primary Sources Across Diverse Learning Levels,” *Case Studies on Teaching with Primary Sources Series* 4 (September 2018), 2.

reflects these institutions.² Thus, while the literature presents pedagogy in the university archives – and by extension the entire profession – as uniformly having made the shift, this research has proven otherwise by expanding the types of institutions surveyed and conducting interviews with practitioners. Until a similar undertaking is done with practitioners in the universities, there remains the potential that practices amongst many university archivists also reflect a pedagogy undergoing evolution.

As expected, an area in which university and non-university archivists share teaching goals is in the expansion of both the subject and object of teaching. Archivists look to grow beyond history, genealogy, and occasional English classes, and several participants discussed their desire to present materials that represent a more diverse and complete portrait of who archives are for and about. Rather than continue to present the “great white man” curriculum, many participants are working to bring new audiences into the archives by showing that collections can relate to those outside of archives and institutions’ historically white user base. That this is happening alongside active learning presents the opportunity for far more critical engagement with the realities and complexities of race, gender, and ethnicity in the United States and Canada.

5.2 The Need for Training

A number of participants reported their colleagues being resistant to changing their teaching methods or to being resistant to teaching in general, revealing the level of discomfort that remains in embracing this role of the profession. A question that I asked each research

² Suzy Taraba, “Where Do We Go from Here?: Evaluating a Long-Term Program of Outreach and Making it Better” in *Past or Portal?: Enhancing Undergraduate Learning through Special Collections and Archives*, eds. Eleanor Mitchell, Peggy Seiden, and Suzy Taraba, (Atlanta: Association of College & Research Libraries, 2012), 225-233.

subject was, “Had you had any preparation for teaching in an archival setting?” along with a follow-up of “What type of preparation did you have?” There were no participants who had received training in a library and information science program. This finding tracks with the research of Lindsay Anderberg et al., who found that very few library and information studies programs even offered coursework on teaching.³

The participants that did have training in teaching reported that it came through continuing education programs, careers prior to their entering the archival field, or their own colleagues. Or, research subjects reported that they were turning to their colleagues in the museum education and public history world when their own training had not adequately prepared them for the task. This points to a field that is not being prepared for a key task of archival outreach in the modern era in training programs. Groups like TPS are filling the gap of pedagogical training where LIS programs are falling short. While a greater level of cooperation between the gallery, library, archives, and museum (GLAM) fields is certainly a good thing, this should not be the primary place that archivists are citing for their training in teaching. Further research amongst university archivists could show whether this is a trait of this portion of the field or if it is more widespread throughout the archival profession.

Even archivists who reported making the shift from passive to active learning often felt discomfort with their own role as a teacher. P10 did not even consider themselves a teacher, despite responding to the call to take part in this study. P11 stated that it was still difficult for them to “pick up the teaching hat per se...I was way more a lecturer than a teacher. And I still say I’m a trainer sometimes more than a teacher.” The fact that even early career archivists did

³ Lindsay Anderberg, et. al., “Teaching the Teacher: Primary Source Instruction in American and Canadian Archives Graduate Programs,” *American Archivist* 81, no. 1 (2018), 188-215.

not begin to more frequently cite pedagogical training in LIS programs points to this remaining a longstanding issue in the field.

5.3 The Role of Institutions

Participants in this study largely pointed to their institutions taking a greater interest in the archives teaching. The ways that this manifested included hiring professionally trained archivists for the first time or charging archivists with the mandate of teaching for the first time. Other institutions showed a sense that archives had a larger role to play in education or in collaboration with departments that had historically been teaching departments. This trend was particularly prominent in historical societies, and even some archivists in government institutions were given the explicit leeway and encouragement by leadership to expand their teaching program. While this may be a sampling error, due to the voluntary nature of this study and its restriction to archivists who were already teaching, the fact that a not insignificant number of the participants reported expansion and encouragement of teaching at institutions and archives where this was not always a priority points to a positive future.

Paradoxically, a smaller subset of participants reported expanding their teaching program while also reporting the exact opposite from their leadership – a distant and disinterested leadership that had minimal concern or knowledge of their archives. This trend appeared most frequently in government archives with leaderships consisting of non-archivists. With these types of leadership, the participants felt that as long as they achieved the leadership's interpretations of standard duties – completed reference requests and providing resources – anything else they did was considered extra, but extraneous. While these archivists had managed some significant achievements under their own teaching initiative, they did have a sense of

wanting to show their full value to their leadership. In a profession where budgets are a constant foe, presenting teaching as valuable and necessary – as part of the standard duties – could be used to justify a dedication of budget, personnel, resources, and dedicated time and funds to teaching in its own right.

Institutional barriers would also have the potential to bar an important demographic appearing in this data set at all: archivists who were just starting teaching programs, or who had programs that were suffering or discontinued. This also left out those archivists whose leadership did not approve teaching programs but who still had their own desire for programs. These perspectives would likely present a different depiction of the state of teaching in the archives. For as much as institutions appear to be moving towards more cohesive teaching programs, with a stronger institutional mandate to teach, this is derived from a self-selecting sample set. Further examination would require looking at a wide range of institutions from the level of leadership, something that perhaps will appear in the results of A*CENSUS II, which is currently underway as this is being written in 2022.

5.4 Forming Partnerships

Although the archival literature advises archivists to be active in creating their teaching partnerships, the archivists in this study largely reported satisfaction with their level of engagement with partners and their continued use of networking and longstanding relationships. Some of the participants in this study mentioned their desire to reach out to form new teaching partnerships, but the majority reported great success through word-of-mouth or their own networking. In many ways, this aspect of teaching resembled the old methods of archival access, where the most common way that researchers would discover archival

collections was through word-of-mouth as researchers talked with each other.⁴ This too eventually proved unsustainable and limiting as the field moved toward providing expanding outreach efforts. At the same time, archivists must be able to adequately prepare for teaching sessions, especially if they intend to make them active sessions and especially if they are meant to be a new topic or session. When faced with the limited number of potential users and teaching partners in non-university institutions the necessary research and tailoring of proposals to potential teaching partners, with no guarantee of payoff, the relegation of this task becomes far more understandable. This also is a reason why boarding schools, with the limited scope of their user base, seem to be exempt from this trend and has an experience in forming partnerships in a way far more similar to that of a university.

When teaching partners have a guiding figure, such as a teacher, the participants in this study did share a common trait with their university counterparts, pointing to the necessity of the partners working and communicating with the archivists. Several participants, when discussing their work with K-12 and college audiences, discussed the need for a teacher to put in the work to ensure a lesson meets their criteria for success. The descriptions that they provided of relationships where a high level of communication had occurred were more likely to report utilization of active learning methods based around the lessons of the partner. Other groups did not have a guiding authoritative force like a teacher or professor, such as volunteers, adult learners, or interest groups. These groups saw more use of types of learning that included passive lectures, but also exhibits or discussions as active learning methodology. Further examination of archivists and their relationships with these groups could reveal specifics of

⁴ Elizabeth Yakel, "Listening to Users," *Archival Issues* 26, no. 2 (2002), 118.

teaching, access, and outreach for an under-studied classroom composition, one less frequently entering a university classroom.

5.5 Who Is Doing the Teaching

With regard to demographics, my interviews contained no questions about gender, race, or ethnicity. It is notable, however, that, at least amongst participants who included personal pronouns in their email signature, had information online, or included pronouns on their videoconferencing screen, all participants were women. As evidenced by the 2004 Archives Census, the archival field as a whole was about 65% female.⁵ As this is being written in 2022, an updated A*CENSUS II is under production, which may reveal a shift in demographics which refines those numbers. While I did expect the majority of my participants to be women, based on my knowledge of these statistics, I did not expect my volunteer base to be as overwhelmingly female as they were.

Both the field of librarianship and teaching have historically been construed as feminine. When the American Library Association began to construct library science programs in the late nineteenth century, it designated tasks that it viewed as routine and clerical as feminine roles, while tasks such as administration, policy, and bibliography were reserved for men.⁶ While a few participants in this study were leaders of departments, either with staff who reported to them or as lone arrangers, the majority indicated that they were part of a team who reported to a head of department. This implies that teaching, another profession traditionally coded as female, falls

⁵ Victoria Irons Walch, Nancy Beaumont, Elizabeth Yakel, Jeannette Bastian, Nancy Zimmelman, Susan Davis, Anne Diffendal, "A*CENSUS (Archival Census and Education Needs Survey in the United States)," *American Archivist* 69, no. 2 (2006), 334-335.

⁶ Suzanne M. Stauffer, "The Work Calls for Men: The Social Construction of Professionalism and Professional Education for Librarianship," *Journal of Education for Library & Information Science* 57, no. 4 (2017), 315.

under the day-to-day work of archivists who are not department heads or members of leadership.⁷ That a significant enough portion of these archivists self-identified as women, to the point that the demographics in this study could be so overwhelmingly weighted in one direction, points to the continued place of teaching within the hierarchy of archival tasks and those who complete them. Located at the intersection of gender and profession, teaching in the archives remains a feminine task in a feminine profession.

The current A*CENSUS II survey is capturing the data on who comprises archival leadership for the first time.⁸ It will reveal the gender demographics of leadership and whether the field has made significant progress on allowing those outside of the traditional Anglo-Saxon, male patriarchy into roles of authority. It will also remain to be seen how frequently teaching fits into the duties of the field as a whole and those who are involved with administration, compared to the field at large.

5.6 Effects of COVID-19 Pandemic

This study focused on non-university archives, but the results related to the trends of the COVID-19 pandemic reveal ways that teaching has changed in the entire profession. As this is being written in 2022, the effects of the pandemic are only beginning to be examined in the professional literature. Different institutions, at least at the time that the interviews were being conducted, were at different places in the re-opening process, with some welcoming entire classes back in-person, while others were continuing with smaller groups or only offering virtual teaching. Still others remained closed to all teaching sessions, having never made the

⁷ Gina Schlesselman-Tarango, "The Legacy of Lady Bountiful: White Women in the Library," *Library Trends* 64, no. 4 (Spring 2016), 672.

⁸ "A*CENSUS II: Let's Get Started!" Society of American Archivists, updated October 5, 2021, <https://www2.archivists.org/acensus-ii>.

changeover to virtual sessions. Some institutions had been producing virtual teaching content prior to the pandemic, but the pandemic forced a shift to entirely virtual content in order to keep any semblance of business as usual.

It was an expectation of mine that the ability to expand or maintain teaching programs at pre-pandemic levels during the most intensive COVID lockdowns would be related to the size of an institution or department. This factor turned out to play far less of a role in the way teaching programs were affected than I thought it would. Some institutions with relatively large staffs, such as P1's, were only beginning to resume teaching operations near that of its previous levels, while the two-person department described by P9 managed to expand their teaching program as a result of the pandemic.

The difference in this response to the pandemic came from a variety of factors, including how established the teaching program was, the level of digital investment that had taken place, and how networked the institution was with teaching partners. None of these could individually determine the state of teaching during the pandemic. For example, P1's institution was well-established and had made some investment in digitization, but their teaching partners were almost exclusively K-12 programs. When their teaching partners were under enormous pressure to determine how they would continue to operate, extra trips and sessions at a local historical society became of secondary importance. On the contrary, P9, despite being at a far smaller institution with a smaller archival staff and minimal digital initiative, had a wider level of flexibility to innovate and a deeper relationship with teaching partners. Despite having largely the same audience in a different region than P1's, P9 actually increased their teaching load into new subjects by utilizing outdoor and on-the-road sessions. Certainly, future archival literature

will examine the differing ways that the field adjusted to the pandemic, as well as many individual institutional assessments as we gain distance from the worst of the pandemic.

The institutions that could hold virtual sessions were aided in many cases by access to digital surrogates of archival materials and to an institution's prior dedication to such investments of time and resources. During times when few or no individuals were permitted in the office at all, this was one of the ways that archivists were able to teach with minimal interruption. The use of digital surrogates carries with it its own issues of use and representation of archival documents, such as whether they can actually be considered substitutes for their analog versions and the nature of how research is conducted with digital surrogates.⁹

Some of the early professional literature regarding teaching during the pandemic and based on university experiences indicate archivists were able to successfully incorporate activities using digital surrogates, and actually may have been discouraging of passive teaching methods such as tours.¹⁰ One in particular also noted the potential that this provided the chance to work in a digital environment that many undergraduates were familiar with and found less intimidating than an archival reading room at their first visit.¹¹ This points to the opposite experience of the participants in this study, who increased the use of passive methods, and for whom the general consensus of the participants in this study was that the virtual sessions were not as effective, especially for the teachers who rely on discussion for active portions of the lessons. However, there was also the sense that it was better than nothing for the teaching

⁹ See, for example, Lori Lynn Dekydtspotter and Cherry Dunham Williams, "Alchemy and Innovation: Cultivating an Appreciation for Primary Sources in Younger Students," *RBJ: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 14, no. 2 (2013), 67-81.

¹⁰ Donald C. Force and Randy Smith, "Context Lost: Digital Surrogates, Their Physical Counterparts, and the Metadata that Is Keeping Them Apart," *American Archivist* 84, no. 1 (2021), 91-118; Christine Lutz, "Instruction in the Before Times at Special Collections & University Archives" (paper presented at Spring 2022 meeting of the Mid-Atlantic Regional Archives Conference, Harrisonburg, VA, March 26, 2022).

¹¹ Heidi Craig and Kevin M. O'Sullivan, "Primary Source Literacy in the Era of COVID-19 and Beyond," *portal: Libraries and the Academy* 22, no. 1 (January 2022), 98-99.

program, and the benefits of the new audiences it reached made it worth the tradeoff. As this time period receives more attention, a larger consensus on the benefits, drawbacks, and changes should begin to emerge.

5.7 Summary

Beyond the implications of this study on teaching methods and the need for more robust training in pedagogical methods in library science programs, this study points to a need to examine our archival institutions and the concern we have for teaching within them. Institutions appear to be showing a greater concern for teaching, but this may be a sampling error from a study that left out those struggling against institutional roadblocks. The makeup of the participants also raises questions about the demographics of these institutions and the role of teaching within them in a field construed and constructed as feminine with a highly gendered division of labor. Lastly, the field looks to the future amidst the fallout of the labor and practice shifts of the COVID-19 pandemic, which will require further examination of teaching methods and investment in digitization and remote access to materials.

Chapter 6: Conclusion

The movement towards active learning that has taken place in the archival field since 2000 has begun by changing archivists into collaborative partners of teachers and professors rather than merely a source of a show-and-tell or a day out of the classroom. Building off of the work done in the library profession, particularly in university settings, this shift has given the archivist a new role as educator and planted the seed of primary source literacy in the minds of a next generation.

Archivists outside of universities, without the institutional mandates or convenient access to teaching partnerships of their university counterparts, have been slower to make these changes, or at least have not had the ability to be as vocal about it in the literature. This does not mean that the shift has not been happening. The collection of interviews from teaching archivists outside of university institutions in this study shows that, although they are still teaching in passive ways under certain conditions, they too are utilizing active and constructivist teaching methods and doing so in innovative ways. Although there are portions of the literature from universities that they have not adopted, such as using quantitative assessment and actively pursuing new teaching partnerships, the interviews reveal contentment with these methods based on their institutional mandates and scale of departments. Although some institutional hurdles remain and a portion of the interviews reveal archivists that have begun active and innovative teaching programs despite a distant leadership, more and more of the institutional structures are providing the support for non-university archives to take the step into teaching programs.

Despite this movement at the practicing and the institutional levels, there are still elements of the field in flux. Archivists with distant or uninterested leadership can remain separated from potential partners within the same organization, which hinders the ability of

departments to learn from and collaborate with each other. Also, a number of participants reported colleagues who are uncomfortable with teaching or with active learning methods, which points to deficiencies in the training of archivists for this task. Many of the participants learned their teaching methods on the job, from their colleagues, from prior positions, or from their counterparts in the wider GLAM field. While the role of teaching has been emphasized more and more in the last two decades, the requisite preparation has not been adequate through formal library science programs.

The data that I collected came from voluntary participants who were already teaching and does not include those who were reluctant, did not have a teaching program, or had institutional blockades in their way. It is my hope that this study, in addition to spurring changes in the way that institutions and LIS programs prepare future professionals, can show archivists from a variety of institutions that a teaching program is within their capabilities. Teaching certainly takes time, as does establishing educational partnerships, but, speaking only from my own experience, creating a new lesson takes approximately the same or less time than creating some of the more complex research guides that I have created. The profession, both inside and outside of universities, is creating high-quality and active programming for students of a wide age range and information needs. Ensuring that a new generation of students and users are able to process and apply information to their lives certainly meets this mandate.

Appendix A: Interview Questions

Introduction

This project aims to gather the experiences of teaching archivists who primarily work for non-academic institutions. The interview will focus on your education, your teaching partnerships, and your challenges and successes in your work as a teacher in the archives. We have already clarified in setting up this interview that you are a teaching archivist in a non-university setting. I am going to ask your name, your position, and your institution again in the interview so that the information is included with your responses. In any publication that comes from this interview, your responses will be anonymized. I am going to ask about your experience as a teacher at your current institution and, if applicable, your teaching experiences in prior positions. Do you have any questions?

Do I have your permission to record this interview?

Questions

Today is [date].

1. Can you please tell me your name, your position, and your institution?
2. How long have you been in this position?
3. What kinds of activities have you undertaken that you feel fall within the category of teaching?
4. Can you give me an overview about any of the above sessions or programs that you have taught in the past or teach currently?
5. Did you know teaching would be part of your duties when you started in this position? [Alternatively: How did you come to teach in your position?]
6. Had you had any preparation for teaching in an archival setting?
 - 6a. What type of preparation did you have?
 - 6b. Was the preparation effective?
7. How have you found partners for sessions and programs in the past?
 - 7a. [What or who would you say have been your most important teaching partners?]
8. What would you say is your biggest success as a teacher? [Alternatively: What would you say is your biggest success with this partner?]
9. What would you say is the biggest challenge you face as a teacher?
10. How much of your time would you say teaching takes up in your duties?

11. Have you taught in any previous archival positions?
 - 11a. [If there were university positions] Do you see any differences between the teaching experiences in a university archives verses a non-university setting?
12. Have you continued your teaching regimen in the COVID [and/or post-COVID] era?
 - 12a. How has this changed your teaching experience?
13. How do you feel that teaching is different from outreach or other reference work?
14. What would your ideal teaching scenario be like?
15. What advice would you give to archivists teaching for the first time?

Appendix B: Recruitment Note

[State] Archivists Caucus List-serv

I am a Master's student at the University of Maryland iSchool, and I am conducting a research study for my thesis which, which looks to gather experiences of archivists with teaching responsibilities in institutions outside of universities. I am looking for volunteer interview subjects to discuss the teaching methods that you have used and the way that you have formed or developed teaching partnerships in your position. I will ask you about your education and preparation for teaching, your successes and challenges, and, if applicable, the way you have shifted your teaching in the pandemic and post-pandemic more virtual world.

Your responses will be fully anonymized in all transcripts and publications. It is estimated that each interview will take one hour, and interview subjects will be compensated with a \$25 Visa gift card. It is expected that interviews will be conducted via phone or vidchat software, although I am open to in-person interviews if travel is convenient based on volunteer preference. I am local to Frederick, MD in the Baltimore-Washington Area. I will record via written note-taking and audio or video recording; you are free to decide which I may use.

All interview subjects must be 18 years of age or older, and must be employed as an archivist with teaching responsibilities in a non-university or non-academic institutions, or have held such responsibilities at such an institution in the past.

If interested, please contact me at skeef1@umd.edu.

If you think there are other archivists engaged in teaching outside the university who might want to participate, please feel free to share this information with them.

I look forward to meeting you,

Scott Keef1er

Appendix C: Consent Form

CONSENT TO PARTICIPATE

Project Title	Teaching Methods and Partnership Development Patterns for Non-University Archivists
Purpose of the Study	<p>This research is being conducted by Scott Keefer at the University of Maryland, College Park iSchool.</p> <p>I am inviting you to participate in a research study that seeks to understand archival teaching outside university settings. The purpose of the study is to investigate differences between teaching in academic versus non-academic settings. This research is being undertaken as part of Master’s research at the University of Maryland’s College of Information Studies (iSchool). Your perspective would be especially valuable because you have self-identified as a teaching archivist in a non-university institution, which is contrary to the majority of the experiences in the archival literature on the subject. It will serve the purpose of understanding and improving archivists’ teaching abilities and the ways that such teaching initiatives begin.</p>
Procedures	<p>If you agree to take part in this study, you will be asked to participate in an interview, either face-to-face or through video chat software, which will take approximately one hour. With your consent, I would like to make an audio/video recording and take written notes to ensure that our conversation is recorded accurately. Although there will be no formal questionnaire, questions may relate to your background and education, particularly as it relates to teaching; teaching activities that you have done within your institution; successes and challenges; development of teaching partnerships; and, if applicable, the ways that your teaching has changed since the start of the COVID-19 pandemic in March 2020.</p> <p>Once they are created, I will provide you with any copies of transcriptions, and you will have the opportunity to remove or redact any portions of the interview that you wish. You will also have the option to withdraw your entire interview from the research project. Upon your request, I will also provide you with any audio/video recording of the interview.</p> <p>Please indicate how we may record your interview (please initial):</p> <p>_____ You agree that your interview may be recorded through written note-taking</p> <p>_____ You agree that only the audio of your interview will be recorded as part of this project</p> <p>_____ You agree that both the audio and video of your interview will be recorded for this project</p>

<p>Potential Risks and Discomforts</p>	<p>There may be some risks from participating in this research study. Any statements damaging to your employer may have negative repercussions for you professionally and/or financially.</p> <p>In order to alleviate this risk, all names, titles, and institutions will be anonymized in transcriptions and publications deriving from this research. You will be assigned a participant number as an identifier, and you will be able to stop the interview at any time. You will have the opportunity to review the transcription of the interview, once it is created, and you will have the opportunity to remove or redact any information that you provided or remove your interview from the project entirely.</p>
<p>Potential Benefits</p>	<p>There are no direct benefits from participating in this research. However, possible benefits include a sense of contribution to the archival profession. We hope that, in the future, other people might benefit from this study through improved understanding of greater knowledge and acknowledgement of the wide teaching role of archivists, particularly those outside of a university setting.</p>
<p>Confidentiality</p>	<p>Any potential loss of confidentiality will be minimized by storing the data on a password protected computer, with access only to the researcher, faculty advisor, and a contracted transcription service, which will further anonymize your interview.</p> <p>All research data will be stored on a password-protected computer, with backups to the data stored on a flash drive in a locked box. This information will be stored for two years after the completion of the project, at which point it will be deleted permanently.</p> <p>Participants identifiers will be used in place of your name in interview responses, with an identifier key created to link names and responses. This key will be stored on a separate password protected computer.</p> <p>Access to raw interview data will be limited to the researcher, faculty advisor, the interview subject, and any a contracted transcription service (e.g. Rev.com, the University of Maryland's approved vendor for this service, which further anonymizes interview transcripts).</p> <p>If we write a report or article about this research project, your identity will be protected to the maximum extent possible. Your information may be shared with representatives of the University of Maryland, College Park or governmental authorities if you or someone else is in danger or if we are required to do so by law.</p>
<p>Compensation</p>	<p>You will receive a \$25 Visa gift card for your participation in this process. You will receive this immediately at the completion of the interview if it is conducted in person or through the mail if conducted remotely. You will be responsible for any taxes assessed on the compensation.</p> <p>If you do not earn more than \$100 only your name and address will</p>

	be collected to receive compensation.
Right to Withdraw and Questions	<p>Your participation in this research is completely voluntary. You may choose not to take part at all. If you decide to participate in this research, you may stop participating at any time. If you decide not to participate in this study or if you stop participating at any time, you will not be penalized or lose any benefits, with the exception of the \$25 gift card.</p> <p>Those who complete the interview but choose to withdraw from the project at a later date will not forfeit the gift card.</p> <p>If you decide to stop taking part in the study, if you have questions, concerns, or complaints, or if you need to report an injury related to the research, please contact the investigator:</p> <p style="text-align: center;">Scott Keefer 312 Selwyn Dr. Apt. 1E Frederick, MD 21701 Skeef1@umd.edu 412-916-6116</p>
Participant Rights	<p>If you have questions about your rights as a research participant or wish to report a research-related injury, please contact:</p> <p style="text-align: center;">University of Maryland College Park Institutional Review Board Office 1204 Marie Mount Hall College Park, Maryland, 20742 E-mail: irb@umd.edu Telephone: 301-405-0678</p> <p>For more information regarding participant rights, please visit: https://research.umd.edu/irb-research-participants</p> <p>This research has been reviewed according to the University of Maryland, College Park IRB procedures for research involving human subjects.</p>
Statement of Consent	<p>Your signature indicates that you are at least 18 years of age; you have read this consent form or have had it read to you; your questions have been answered to your satisfaction and you voluntarily agree to participate in this research study. You will receive a copy of this signed consent form.</p> <p>If you agree to participate, please sign your name below.</p>

Signature and Date	NAME OF PARTICIPANT [Please Print]	
	SIGNATURE OF PARTICIPANT	
	DATE	

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