Introduction

Teaching with primary source materials is unquestionably “hot” in higher education. Teaching faculty, administrative bodies, and even students are now beginning to understand what special collections librarians have always known: working with authentic rare books, manuscripts, or archival documents produces a particularly stimulating educational environment, and physically handling original materials fuels lively discussion, generates uncommon ideas, and cultivates critical thinking. Special collections librarians have spent considerable time and energy over the past decade building relationships and creating outreach programs that show how a visit to special collections to interpret actual primary sources can provoke an unusual level of critical inquiry in undergraduate teaching and learning; due to these efforts, the larger academic community is taking notice.

Special collections librarians are, of course, responding with enthusiasm to the interest in our instructional services and our collections and are ever looking for new and inspired ways to promote our agenda of access to materials. Deeper collaborations and partnerships with teaching faculty across multiple disciplines allow us to hone our instructional skills and to devise novel instructional approaches that will get special collections materials into the hands of undergraduates. We are talking more among ourselves about instruction, as a workshop at the 2009 Rare Books and Manuscripts Section (RBMS) Preconference proves: “Beyond the Show and Tell: Teaching Strategies for Special Collections Professionals” drew a full enrollment, and participants later generated a “Teaching Strategies in Special Collections” member community in ALA-Connect devoted to discussing instruction in the special collections environment.

Many in higher education are convinced now of the value in the concept of the “archives as laboratory,” as evidenced by the numerous success stories from special
collections and archives departments experimenting with the idea. But what happens when an institution’s “laboratory” is too small to accommodate classes that might greatly benefit from working with primary source materials? There are several commonly used workarounds and solutions to the problem of larger classes and limited space, such as dividing students into several smaller groups for multiple visits, or providing digital surrogates of materials. However, these solutions do not always fit the problem, especially at larger public universities where even “small” sections top thirty students and large lecture sections are more common.

Facing this space problem at our institution, we began to question why the full experience with primary sources that we endorse so strongly should necessarily be restricted to classes with fewer students. How could we bring the educational benefits that come from analyzing and interpreting physical materials to a larger class environment, and would the benefits derived be worth the costs? We saw the necessity of taking risks to serve new audiences; and, ultimately, our decision to democratize the experience of primary source usage resulted in new collaborations, successful products, and surprising rewards.

Literature Review and Policy Survey
The literature on instruction in special collections environments has been growing steadily for the past decade, and it is inspirational to review the creative instructional methods presented by pioneers in this area. Ann Schmiesing and Deborah Hollis, for example, detail successful approaches for class partnerships with faculty and for student-centered, active, and collaborative learning experiences using rare materials. Marcus Robyns encourages archivists and special collections librarians to push “beyond showing students how to find and access information in archives and toward great instruction in critical interpretation and analysis of that information” and explains a captivating archival education model to make this happen. Pablo Alvarez offers interesting ways to use special collections materials and the history of the book to illuminate other disciplines. David Pavelich and Julia Gardner show how ephemeral materials, when incorporated into special collections teaching

and class research assignments, can become powerful and motivating educational tools.\(^5\)

These instructional methods share a traditional class model for special collections instruction, a learning session with built-in “hands on” time for students to physically explore and engage with the materials. In his influential examination on public services in special collections, Daniel Traister pushes the profession to consider the purpose of, and value in, the act of allowing students to touch and handle materials in these sessions.\(^6\) Through this hands-on time, students’ natural attraction to the artifact is encouraged, instead of hindered, and a respect and responsibility for the materials’ continued preservation is passed on through librarians’ handling instructions and watchful eyes; through these sessions, respectful researchers can be attracted and nurtured. Along with this hands-on time, examples in the literature show that visits to special collections to see important materials are frequently supplemented by an introduction to archival research concepts and methods, an orientation to departmental procedures and policies, and/or a description of other relevant holdings in the collections of the department; however, the usual special collections instruction session model rightly privileges student time with the materials and recognizes the importance of spending time to connect both intellectually and physically with the materials.

It is generally recognized in the literature on special collections instruction that a smaller class size lends itself more easily to the primary source experience. Susan Allen notes in her pioneering study on instruction in special collections environments, “Smaller liberal arts colleges with smaller class sizes are perfectly placed to link students with special collections.”\(^7\) The small class visit model is also customary at larger universities with larger average class sizes. This intimate classroom environment produces significant benefits for visiting students. In this setting, students can gather around and share in the intensive discovery of a primary source together. The professor and/or librarian can more easily encourage deep investigation, isolate evidential details, and introduce concepts for class discussion among a smaller group. Students in this model gain confidence in handling original materials, and any “archival anxiety” they may harbor is at least somewhat ameliorated by a visit with the trusted faculty member to the department.

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Less traditional models of special collections instruction in practice also deal with smaller groups. In an innovative experiment, Sutton and Knight integrated special collections instruction with general bibliographic instruction sessions and had exciting results. This model shows that introducing rare books or archival materials in combination with general library skills is not only an engaging and sensible way to expose special collections materials, but that it can dramatically strengthen undergraduates’ evolving information literacy skills. This model may not replace the more intensive engagement with primary sources that can take place within the special collections department, but it is a creative step in the process of making undergraduates familiar and comfortable with coming to special collections and using our materials. Though the authors of this interesting project targeted the (typically larger) general bibliographic instruction sessions, the class size in this particular study is still likely to be relatively small based on their total institutional enrollment of 4,000. Likewise, in her description of a novel instructional collaboration involving special collections departments and nontraditional visitors from the sciences, Michelle Visser indicates that these larger science lectures were split into separately visiting sections, so that all students could see a wide range of materials and have hands-on time with them.

Though these and other examples in the literature unquestionably present valuable and welcome ideas for teaching with special collections materials, virtually all of them assume smaller seminar-style classes rather than large lecture-style classes and/or students’ presence in the special collections department. In her fascinating study on the instructional activities in special collections departments within selected ARL libraries, Anna Elise Allison found corresponding trends. According to Allison, instructional spaces within these departments “are fairly small, with ten to thirty seats, while the average size is thirty-four seats.” This is enough for large seminars, but small compared to many typical college classes. According to Allison’s data, public institutions in her survey averaged more instructional seats in special collections than private institutions had, because “several departments in public universities have large facilities.”

Nearly every special collections department in her study reported that they do instruction either within the department or in a classroom inside the library. (One department specified “other” but did not indicate where.) In those departments

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11. Ibid., 29.
that do consider instruction in larger library classrooms outside of special collections, several indicated that the department setting is preferred because library classrooms require staff to move materials out of the department, "thereby limiting the number...[and] prohibit[ing] close inspection of materials by students."12

Allison alludes to the possibility of taking materials to a classroom outside special collections in her discussion of perceived visit benefits but again notes that a departmental session was generally preferred by survey respondents because "students become familiar with the environment and can use original documents during the session...[that are] often bulky or fragile and cannot be easily or safely transported to a library or academic classroom."13

From these responses, it is clear that many special collections departments feel that instructional activities taking place outside the department preclude the use of original materials in teaching. Taking materials out of the department (either for instructional use in larger classrooms or otherwise) is apparently not widely mentioned in literature on special collections instructional activities.

To see if this option was perhaps offered but simply not extensively used, I informally surveyed twenty-five special collections department Web sites that discussed instruction options. I randomly chose Web sites of larger state universities or their branch campuses, such as my own, assuming that I was more likely to find larger class sizes at this type of university and thus other special collections departments that faced this challenge. Only two of twenty-five departments clearly offered the possibility of taking materials offsite to other classrooms on Web pages devoted to instruction. Twenty-three departments either overtly limited instruction to special collections' physical spaces, or implied its limit there by exclusively using the word "visit" in reference to their spaces and instruction, or were unclear in their descriptions of what arrangements were offered. Though many of these Web pages did not indicate the size of their instructional spaces, those that did indicated that they could accommodate as few as fifteen students and as many as forty students.

Although instruction using special collections materials it is a stated priority for most departments, this is generally limited to the department's facilities or those within the library's buildings. Undoubtedly, this policy is meant to strike a balance between maintaining the security and physical integrity of materials and providing access to them; it is quite possible that institutions that in reality do offer the option of visiting campus classrooms with materials decline to advertise the opportunity because of past difficulties striking that balance in this instructional situation. Chal-

12. Ibid., 28.
13. Ibid., 45.
lenges in recreating the myriad security measures in place in reading rooms (such as unblinking surveillance by camera and staff, limited access points, stowing of personal belongings, and the presence of guards) within campus classrooms are certainly a deterrent to advertising the option of taking materials offsite. But this policy also significantly limits the special collections experience to small groups in small classes. How can those teaching with special collections explore class models that allow for creative use in a larger environment?

Our special collections department at San Diego State University (SDSU) was recently presented with an opportunity to bring primary source materials to just such a large class. While initially somewhat daunting, this permitted us to achieve the educational goals that primary source usage promotes without unreasonably compromising the safety of the materials.

Case Study
As many involved in promotional, outreach, and instructional activities within special collections departments know, faculty members fully enthused about using special collections in teaching are a rare breed who, when encountered, should be cherished. Such a faculty member, in addition to sometimes becoming a trusted friend and colleague, can be an ambassador for special collections and an advocate within his or her department and/or college who can get our message into new ears and areas.

Professor Amy Schmitz-Weiss and I became acquainted at a library new faculty orientation before the fall semester started. At this event, faculty members are encouraged to browse “stations” advertising library services and departments, and to speak with librarians at the stations pertinent to their needs. This reception is a wonderful way to meet new colleagues and welcome them, and to explain exactly how we can support them in their specific research and teaching endeavors. When I met Professor Schmitz-Weiss and learned that she would be teaching “Principles of Journalism” in the fall semester, I described our interesting historical newspaper holdings and launched into my usual “sales pitch” to talk about how undergraduates might benefit from the primary source experience in our department. But the sale was already made; Professor Schmitz-Weiss was already planning an historical approach in teaching and was convinced of the value of learning with primary sources from her own prior experiences. She suggested we meet later in the semester to explore ideas for bringing her class to Special Collections.

When we met, I saw that her enthusiasm for teaching with primary sources continued. She explained that her main goal was to get her students to handle early newspapers to compare and contrast them with media today. She wanted them to be physically reminded of an action and a pattern of thought that was essential to American life and thought for hundreds of years by handling older newspapers, something impossible to learn from a digital version on a screen. Professor Schmitz-Weiss also wanted students to develop searching skills using digital databases of historic newspaper collections in an extra credit assignment. For the hands-on exercise, I suggested we use a collection of late eighteenth- and early nineteenth-century newspapers held by Special Collections, along with our standard primary source analysis worksheet as an in-class activity that would deepen the educational profit. It was clear from our discussion that this combination would satisfy her learning goals for the class, but then we realized the major problem: the Principles of Journalism class was a full 120 students.

Our typical instruction session in Special Collections at SDSU, as elsewhere, is approximately 15–30 students. A larger instructional space near the department and inside the library can accommodate about 40–50 students, and occasionally we will move classes there. Usually with classes larger than 50, I suggest the standard fixes mentioned by others in the literature review above: replacing physical materials with digital surrogates posted on the class module in Blackboard, dividing the class into smaller, separately visiting sections, or an out-of-class small group assignment. However, in this case, none of these solutions actually solved our quandary: substituting digital surrogates would defeat most of Professor Schmitz-Weiss’ goals in planning the session, dividing the class into smaller sections for separate visits would be very difficult to coordinate and could potentially affect attendance levels, and requiring so many smaller groups to come in for an out-of-class assignment would put a considerable strain on our small reading room staff. Without the space to handle the class, the time to accommodate separate sections, the staff to handle numerous small groups, or the possibility of using digital images, what were our choices?

To send Professor Schmitz-Weiss away without being able to accommodate her at all was unthinkable to me—I could not imagine turning away a faculty member with her enthusiasm and appreciation of the importance of the primary source experience. After carefully weighing the options and consequences, I suggested that we bring the materials to her classroom on campus, taking special collections materials out of the department and out of the library.

Our plan was three-fold; first, I would introduce students to several databases of digital historical newspapers that they would be using for a later extra-credit assign-
ment. Then, I would give a short but weighty introduction to handling guidelines. Finally, the class would separate into thirty four-person groups, choose a group “handler” to be in charge of maneuvering a newspaper, and work together within the groups to complete the primary sources worksheet, which Professor Schmitz-Weiss had modified to better fit the class goals. She and I would walk among the groups, encouraging discussion and supervising handling. Admittedly, there were many things in this scenario that could potentially go wrong.

First, there was the issue of selecting materials that could withstand intensive handling outside the special collections environment. The newspaper collection in question was an artificial collection made up of loose, single issues scattered throughout the late eighteenth and nineteenth centuries, from a variety of cities with a variety of titles.15 The class had just read articles covering journalism in the developing nation; thus, issues from the 1790s to the 1840s were selected for both content and condition. All were made from hearty rag paper and could withstand significant handling without damage. Before the class, I carefully reviewed and inspected the collection and selected thirty loose issues of newspapers that were sturdy enough to be used by the thirty handlers.16

To ensure the collection’s security outside the special collections environment, I asked staff members to list and document exactly what was removed from the collections, and I photographed this process. As the items were removed, I checked to see that each was marked with our standard security stamp. After this documentation process, we carefully packaged the newspapers for transport by choosing an appropriately sized archival box and protecting the newspapers with tissue. Though the reliable San Diego weather forecast thankfully called for sunshine, we chose a moisture-resistant archival box to guard against any possible damage en route.

On the morning of the class, I walked the box of newspapers to the classroom, five minutes away on campus. As students arrived for the nine a.m. class with coffee, we explained at the door that we would be doing something a little different that day and asked them to deposit all food and drink at a table by the door. After the entire class had arrived, Professor Schmitz-Weiss introduced me, previewed what we would be doing that day, and separated the students into groups. After a brief introduction to the department, I began by instructing students on how to use an historical newspaper database for their extra credit assignment and segued from the digital images into the magic of seeing the real thing.

15. It is fitting that some of these newspapers had previously been the teaching collection of another professor of Journalism, who frequently had her students handle them for learning purposes before her retirement and her donation of them to Special Collections.
16. Except with photographs and other selected materials, we fall solidly into the anti-glove arena and do not require gloves to be worn in our instructional sessions or in our Reading Room at SDSU.
In a small seminar setting, I can easily keep a watchful eye on students’ handling skills after introducing them to basic methods. While encouraging them to browse and get over the fear of touching and interacting with the materials, I look for wayward pens, smudgy hands, or wetted fingers. In this stadium seating lecture environment, it was clear this would be a more challenging task, but I tried to reconstruct the smaller environment as much as possible. An overemphasis on careful handling was needed.

First, I asked everyone to collectively put any lingering water bottles or beverages onto a nearby table. Completing this action together seemed to get the point across, intrigue the students, and grab their attention for the next direction. Likewise we all put away pens and ink. At this point I asked everyone to check their hands and look for any remnants of their breakfast burritos—luckily there was a nearby restroom that I asked them to visit if any hands needed washing. I spent several minutes describing and demonstrating how newspapers should be handled, how the pages should be turned, and cautioning against filling out their worksheets on top of the newspapers. Though there would only be one handler per group, performing this handling orientation for the entire class promoted a collective sense of propriety with the materials. And though I rarely use “scare tactics” in describing how to handle materials (because it seems to defeat the purpose of getting the students to overcome fear of the materials), in this case, to make my point and to garner authority, I showed a newspaper from the collection that was already torn three-quarters down the center fold, to illustrate the consequences of too-quick movements or grabbing. As the handlers came to the front of the classroom to retrieve their groups’ newspaper, they were also handed pencils to distribute to the group if needed.

I enlisted Professor Schmitz-Weiss as a second pair of eyes. I had previously given her a primer on handling, and we looked for hidden pens and proper handling as we walked among the small groups to interact with students, help them engage and interpret the materials, and guide discussion while they completed the assignment.

I was astonished to see how seriously the students took my cautions. The class exhibited great care and respect for the newspapers throughout the class session, laying them down gently and turning over pages with obvious care. A few asked me for clarification on handling points as I walked around the room, but I was not once moved to correct anyone’s behavior.

During the class session, students were extremely engaged with the materials and with the exercise. Many expressed surprise and delight at seeing older newspapers
and unwittingly commented on the core principles of the exercise—the benefit of the physicality of the experience and exposure to actual newspapers of the time. Comments about the feel of the paper, the impression of type upon the paper, and other physical details were repeated throughout the session. Many noted surprisingly profound comparisons between these newspapers and modern newspapers as they worked, and Professor Schmitz-Weiss and I fielded numerous curious questions as we walked among the groups.

After the class was over, I asked students to deposit their newspapers on a table at the front of the classroom. I marked a checklist as they were deposited, and another staff member repeated this process when the box arrived back in Special Collections. As I replaced each item within the collection, I carefully inspected for damage, and found no discernible evidence of harm.

When Professor Schmitz-Weiss shared worksheets from the in-class activity with me, we were happy to find that most students had done very well and had obviously given thought to their answers. At the end of the semester after receiving course evaluations, Professor Schmitz-Weiss reported that a number of students had mentioned this exercise positively in their evaluations; some recalled it as their favorite part of the course. In their worksheet responses, students zeroed in on the tangible value of teaching and learning with original artifacts. Professor Schmitz-Weiss had added an excellent question to the worksheet: “How does this primary source experience differ from accessing this newspaper online?” Student responses were insightful and inspiring. Observations on the sensual experience of seeing, smelling, and touching the newspapers were common.

• “You can smell it and feel it and appreciate the age of the document, which you can’t get online.”
• “You can actually feel the texture of it, you can see the wear, you can smell the age, you can get a real feel for how old [the newspaper] is.”
• “It puts history in your hands and makes the experience more tangible and real.”

Students also showed profundity in their observations on the durability and permanence of the medium.

• “The material of the newspaper is durable enough to last for 200 years compared to online, [where] the content can be erased permanently.”
• “[The paper] is tangible and so can be passed on….”

Students did note that the “analog” medium demanded a much longer attention span and more patience from the user while seeking information. But some spoke
of the pause required of them (and its effects) in somewhat admiring tones:

- “You are forced to examine the paper yourself.”
- “It’s near impossible to skim this paper, you really must read it all to ’dig up the facts.’”
- “We can read it the way the people in 1819 did.”
- “Having this paper in its entirety and in physical form allows the reader to be able to connect all the information together. Because so much of this newspaper [is] stories directly related to or connected to the preceding one, it is important to be able to see and read those stories together, not having to click, change page, or scroll down…which can distract.”

A higher level of personal involvement (and the curiosity or stimulation resulting from it) was frequently noted:

- “We are able to actually feel and hold the document…we can see things easier.”
- “It’s more interactive, being able to turn pages instead of scrolling on a computer…It’s more personal.”
- “We’re more interested in browsing all parts of the newspaper because it is physically in our hands.”

Not all students were fully sold on the physical experience, but the experience of handling original materials did force them to think critically about these issues and how it relates to their chosen major:

- “Online you are able to easily access and pinpoint what you need without worrying about handling.”
- “Online layout can be modified [and font size is] easier to read because of zoom.”
- “There is no way to search this paper!”
- “How can you find what you are looking for?”

In preparing this exercise for another semester’s class, we have made several adjustments. First, to save class time, Professor Schmitz-Weiss will be splitting the class into groups during the session before this class, so that students can sit in their groups immediately as they walk in the morning of the session. We will also be giving advanced warning of the exercise, to cut down on the number of beverages brought to class. Despite clear respect for the materials demonstrated by students, we knew after the first class that more watchful eyes are always better. We will also be asking another special collections staff member to attend, to add another pair of eyes to further ensure security and proper handling in the classroom.
Conclusions and Future Directions
The educational benefit of working with primary sources in this particular classroom was clear. By allowing comparison and contrast between the primary source and its online surrogate, this experience pushed these undergraduate journalism students to draw sensible and thoughtful conclusions on topics currently at issue in their field and in their world, such as media durability and permanence, reliability and authenticity of information, readability of content and layout, and usability. Although the session did not accomplish other common goals of special collections instruction sessions, such as exposure to our unique environment, providing familiarity with our policies and procedures, or teaching skills to extend research inquiries, it may have fostered a deeper willingness to embrace and understand these topics at a later time in students’ lives. The session was not a replacement for one within a special collections environment that might alleviate anxiety or nervousness about working with “old stuff”; but students did obtain basic familiarity with, and respect for, original materials, an understanding of their “specialness” and potential value in learning, and an invitation to visit the department for their own research reasons in the future. Although the culture of the small special collections classroom was not fully recreated, small group work evoked the experience. The session can be seen as a step in the process of putting undergraduates in contact with important primary sources.

Obviously, bringing rare and unique materials out of the special collections department and into campus classrooms is not, in any way, a one-size-fits-all solution to the problem of serving larger classes. In this particular case, workable materials were happily matched with both manageable logistics and educational benefits; preservation and security concerns were thoroughly addressed, and the integrity of the materials was not unduly compromised for an uncertain benefit. The situation would have been entirely impossible, for example, if the topic was later nineteenth-century newspapers made of highly brittle wood pulp, which would be unlikely to withstand even the gentlest handling. The items were limited in number and could be counted accurately, something that could be much more difficult with an archival or manuscript collection. Also, these materials were not especially rare and would have been fairly easy and inexpensive to replace in the event of theft or marked damage. Certainly the core concern when bringing materials offsite is whether this act would result in any more risk of harm to materials than any normal wear caused by the usual special collections class visit. Just as special collections librarians examine the circumstances and consider the potential costs when loaning an item from their collections for exhibition or interlibrary loan purposes (and have standard guidelines to steer them in these decisions), so too should the same concerns be measured when deciding to take materials offsite for instructional purposes.
It is likely that taking materials out of special collections to larger classes will frequently be unachievable in certain institutional situations. However, at the very least, we should make ourselves comfortable with offering it as an option when arranging instructional sessions with faculty or when creating content for our Web sites or literature for faculty. Sometimes compromising wisely and carefully on measured evils to find the lesser of the two—slightly increased handling, or unenlightened students?—can require us to examine what is really important in our dual missions of preservation and access. Though from our perspective it may not be possible in very many cases, saying so will force us to articulate to interested faculty members why it cannot be done. Being able to more clearly communicate to teaching faculty our mission and our process of finding the right balance between preservation and access is likely to only help our causes; it may even result in a better mutual understanding that can lead to more workable collaborations.

The current generation of special collections librarians has had the privilege of “growing up” in a transformative era for our profession, when access to materials has been raised to at least the same level of relevance in our eyes that preservation enjoyed in the past. Coming into a special collections career during this time has taught us many lessons about access and how we share our collections—we have been taught to get creative with the materials and to think imaginatively about research use beyond the obvious audiences. Who can use what for what purpose? When this question is inventively answered, our task then becomes to attract those people through the door of the department so we can get the “stuff” into their hands.

Problems arise when we begin to think resourcefully about matching materials to an audience. Does the need to promote our message change in this situation? We deeply know the value of the educational experience involving the physical primary source—assumptions are challenged, critical thinking skills are developed, discoveries are made, and history comes alive. But limiting this experience just to smaller classes may disproportionately privilege the typically smaller classes of the humanities, thus preventing entire groups from knowing the importance of what we can offer or from sharing a stake in our continued operations and funding.

In his inspiring vision of a special collections library organized around teaching and learning, Steven Esca Smith argues passionately for a marked increase of space devoted to education in our departments. Until that happy day arrives and that future comes to fruition, we must think of creative ways to reach out to new audiences and create the new support we seek, to build that future. Our colleagues in

other library departments are scheduling “roving reference” shifts and holding their office hours with a laptop at a table in Starbucks, to “be where students’ eyes are.” How can special collections librarians mirror this behavior, while still protecting our collections? Shouldn’t we depart from our locked vaults now and then to become more visible and more approachable (thus making the collections the same), and maximize the number of students that can have these special, important learning experiences with primary sources? As special collections librarianship evolves away from the model of rigid guardianship found in our faraway past, we must continue that momentum to push and to extend our boundaries, both figuratively and literally. We have learned the outreach lessons that come from flinging open the doors to let the people in—now perhaps it is time to fling open the doors and let the materials out.

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More info at bostonbookfair.com

The California International Antiquarian Book Fair  
February 10-12, 2012  
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The Antiquarian Booksellers’ Association of America, Inc.  
20 West 44th Street, Suite 507  
New York, NY 10036  
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