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Reviewing the Use of Primary Sources in the Undergraduate Business Classroom: Business Librarian Use of Primary Sources in Instruction

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The author declares no conflicts of interest.
Abstract: This literature review explores the use of digitized primary sources as a means of enhancing affective responses to the research process through proposed business librarian-led activities in the undergraduate business classroom. The literature review discusses the implementation of primary sources in the undergraduate business classroom through suggested classroom activities founded upon the ACRL RBMS-SAA Guidelines for Primary Source Literacy, intending to inspire the use of primary sources in other areas of study. Readers will learn how to connect course material to Archival Intelligence Theory; produce a lineup of primary sources meaningful to business students; explore the impact of affect and information-seeking behavior upon research; and consider potential assignment ideas.

Keywords: affect, Archival Intelligence Theory, information literacy, primary sources, primary source literacy
Reviewing the Use of Primary Sources in the Undergraduate Business Classroom:

Business Librarian Use of Primary Sources in Instruction

Primary sources are rich, effective tools that can be used in research by students and faculty in numerous academic fields (Bradley-Sanders, 2019; DeNotto, 2022). Moreover, primary sources and primary source research methods can be implemented in classroom lessons across disciplines, even offering fruitful learning and research experiences in the business classroom (DeNotto, 2022; De Jong, 2021; Garnai & Gauder, 2020). Due to increased accessibility and a measure to preserve the longevity of physical primary sources, the use of digitized primary sources continues to grow in popularity (Craig & O’Sullivan, 2022; Kiser et al., 2023; Longo, 2019; Newman, 2023; Press & Meiman, 2021; Tanaka, 2021).

This literature review explores the use of digitized primary sources as a means of enhancing affective responses to information-seeking behavior and the research process through proposed business librarian-led undergraduate business course activities. These activities are founded upon the Guidelines for Primary Source Literacy, as crafted the joint taskforce of the Association of College and Research Libraries’ (ACRL) Rare Books and Manuscripts Section (RBMS) and the Society of American Archivists (SAA), in an undergraduate business course. There is a need to apply the uses of primary sources and primary source research methods in the business classroom in order to enhance the learning experiences of undergraduate business students. As a result, the primary research question of this paper is as follows: How can primary sources be used in the undergraduate business classroom to engage students in a way that is grounded in Archival Intelligence Theory and offers students the possibility of affective experiences with the source material?
In order to address the gap in the literature pertaining to the use of primary sources in the undergraduate business classroom, this literature review discusses the implementation of primary sources in the undergraduate business classroom in addition to suggested classroom activities showcasing the use of primary sources. These activities offer a malleable approach to conducting primary source research and analysis through a process which may also allow students to engage in affective experiences with the primary source material in the business classroom and beyond. In particular, instruction librarians as well as special collections librarians and archivists with collections pertaining to business will find this paper valuable, though this lesson may be adapted to suit disciplines beyond business.

**Literature Review**

Primary sources, in their many formats, can offer students unique opportunities for classroom engagement across disciplines. Primary sources are defined as “materials in a variety of formats that serve as original evidence documenting a time period, an event, a work, people or ideas” (ACRL RBMS-SAA Joint Task Force, 2018, p. 1). Instruction librarians can foster student interaction with primary sources to build primary source literacy and critical thinking skills alongside the students’ academic interests and courses. In doing so, librarians can develop primary source research methods activities rooted in Archival Intelligence Theory to help students become familiar with identifying, navigating, and accessing primary sources, while also potentially creating opportunities for affective experiences among students (Craig & O’Sullivan, 2022). Due to the increased digitization of primary sources, the inclusion of digitized primary sources as tools within the classroom can be optimal in terms of accessibility and can also lead students to conduct onsite visits to access physical items, if available (Tanaka, 2021).
By implementing in-class activities pertaining to primary source research methods, instruction librarians in the undergraduate business classroom and beyond can further promote the primary sources housed in their institutions and inspire students to utilize these sources in-person or digitally. Incorporating primary source research methods activities can have significant implications in terms of the value of these resources to students across disciplines while also offering rich opportunities for collaboration among instruction librarians, archivists, special collections librarians, etc. (Billeaudeaux & Scott, 2019; Hensley et al., 2014; Kiser et al., 2023). Primary source research method activities can be implemented in various forms, whether in individual workshop sessions or throughout a semester-long course, allowing students multiple opportunities to engage with primary sources in different contexts (ACRL RBMS-SAA Joint Task Force, 2018).

Archival Intelligence Theory and Primary Sources

Primary sources lend themselves to activities grounded in Archival Intelligence Theory. Archival Intelligence Theory concerns itself with examining how users behave when conducting a search within an archival setting or when using archival databases (Yakel & Torres, 2003; Hensley et al., 2014). There are three forms of knowledge required for effective work with primary sources: domain (subject) knowledge, artifactual literacy, and archival intelligence (Yakel & Torres, 2003). While domain knowledge refers to one’s understanding of a research topic and artifactual literacy deals with the interpretation and value assessment of sources, archival intelligence is defined as “a researcher’s knowledge of archival principles, practices, and institutions, such as the reasons underlying archival rules and procedures, how to develop search strategies to explore research questions, and an understanding of the relationship between
primary sources and their surrogates” (Yakel & Torres, 2003, p. 52). These elements of archival intelligence are interrelated and may be considered in a holistic manner during instructional design (Hensley et al., 2014).

Often, students are faced with situations in which their research questions are initially unstructured, and they need to develop strategies that reduce uncertainty and ambiguity (Hensley et al., 2014). Students develop and implement search tactics to pursue their research questions and ask questions of the records themselves or their potential owners. In order to develop a lesson founded upon Archival Intelligence Theory and the use of primary sources, instructors can take advantage of Archival Intelligence Theory’s emphasis on intellective skill, which is also crucial to students applying primary source research methods. These skills aid in framing a search strategy and understanding how surrogates can lead researchers to the primary sources that they seek. Moreover, Archival Intelligence Theory dictates that the “researcher has to make meaningful connections while advancing through the research process” and must “develop the ability to act effectively on those connections” (Yakel & Torres, 2003, p. 51). Crafting an activity around the use of physical or digitized primary sources can not only offer opportunities to collaborate with special collections departments and archives in academic settings but can also challenge students to think about the uses and applications of primary sources in addition to offering opportunities to connect with primary sources through affective experiences.

**The Use of Primary Sources**

Primary sources have been used by students and faculty in a broad range of fields, including sociology, political science, history, literature, media studies, and more (Bradley-Sanders, 2019; Eicher, 2007; DeNotto, 2022). The incorporation of primary sources in the
classroom setting ranges from familiarizing students with them, exploring the role they may hold in research, and developing instructions and exercises around them to promote “lasting research skills and good scholarly habits” in addition to critical thinking skills (Bradley-Sanders, 2019; Craig & O’Sullivan, 2022, p. 95; ACRL RBMS-SAA Joint Task Force, 2018). In the field of business, primary sources portray how an organization has documented and represented itself over time through the works it has produced. For example, one can consult primary sources such as annual reports, financial statements, press releases, letters, diaries, meeting minutes, artifacts, sound and video recordings, photographs, and more as primary sources pertaining to business (Gil, 2019; Nix & Decker, 2021; Visser et al., 2022). Primary sources relating to business can be accessed through various institutions, including the following resources:

  https://repository.duke.edu/dc/adviews

  https://digital.hagley.org/

  https://guides.loc.gov/business-and-labor-history/a-z-list

In addition to these resources, there are also additional tools for locating further resources. One can search for additional institutions geographically through ArchiveGrid as well as explore the possibility of contacting corporate archives via the Society of American Archivists’ corporate archive directory for additional primary sources connecting to business history (ArchiveGrid,
n.d.; Society of American Archivists, n.d.). Moreover, it is worth consulting other academic institutions’ archives for primary sources relating to specific businesses, as company executives’ personal papers and company history collections may be geographically dispersed among corporate archives and academic institutions.

Generally, primary sources are varied in terms of categories, potentially existing as “letters; official documents, ranging from appointments and legal briefs to committee reports; journals and diaries; newspaper and magazine articles; and images, including photographs, drawings, paintings, sketches, and maps” (Eicher, 2007, p. 35). They are valuable and irreplaceable in that their origination is close to eyewitnesses of a certain event or tied to a specific moment in time, “created at, or about, the time of the actual events they represent” (Eicher, 2007, p. 35; ACRL RBMS-SAA Joint Task Force, 2018). Individuals who utilize primary sources can take advantage of “direct evidence of human activity” and can “gain a unique perspective on the subject they are studying” (ACRL RBMS-SAA Joint Task Force, 2018, p. 1).

Overall, primary sources can be complex, but they can also be ideal to use in the classroom for this reason. They can often be incomplete, and their interpretation can be subjective, allowing students to “improve content knowledge and build skills” in order to promote learning and critical thinking (Newman, 2023, p. 216). In other cases, their formats may be unique or unfamiliar to students (ACRL RBMS-SAA Joint Task Force, 2018). Engaging with primary sources can help users become familiar with how to navigate various information sources and building primary source literacy, or “the combination of knowledge, skills, and abilities necessary to effectively find, interrupt, evaluate, and ethically use primary sources within specific disciplinary contexts, in order to create new knowledge or to revise existing
understandings” (ACRL RBMS-SAA Joint Task Force, 2018, pp. 1-2). Moreover, primary source literacy is not isolated; it can interact with other forms of literacy, such as information literacy, visual literacy, and digital literacy, in addition to concepts such as collective memory, cultural heritage, individual perspectives, and cultural perspectives (ACRL RBMS-SAA Joint Task Force, 2018).

Though primary sources can exist in physical form, digitized collections have become numerous (Newman, 2023). Archival education has long emphasized the power of physical primary sources as engaging resources for students, but “in instruction requiring the rhetorical analysis of a primary source, digitized primary sources may engage and contribute to student learning just as effectively as physical sources” (Press & Meiman, 2020, p. 99). In a 2020 study on rhetorical analysis of physical and digitized sources, researchers found that the format of the sources had no discernible impact on learning and engagement levels, carrying “significant implications for primary source pedagogy” (Press & Meiman, 2020, p. 99).

Nonetheless, digitized sources possess benefits and challenges. Digitized sources can readily engage vast numbers of students and are not necessarily bound by the same limitations of archives and repositories in issues with staffing, space, or institutional pedagogical transitions to online or hybrid education (Press & Meiman, 2020). For example, digitization projects such as “the Library of Congress’s American Memory have empowered instructors to connect learners directly with digital surrogates of important primary sources” (Billeaudeaux & Scott, 2019, p. 246). By nature, digital surrogates can be shared and accessed more widely than physical primary sources (Hibbler, 2015; Kiser et al., 2023; Press & Meiman, 2020). However, “[i]ssues regarding search interface functionality and the lack of context for the materials remain barriers to the use of large digitized collections in the classroom” (Press & Meiman, 2020, p. 108).
Moreover, as classes continue to be taught in online and hybrid formats, instruction librarians and instructors will find themselves making choices as to which primary source format(s) they will use in their teaching. This choice carries notable weight in the larger discussion of the significance and overall value of primary sources to institutions (Press & Meiman, 2020). “Expanding the use of primary source materials into digital spaces may have implications not only for primary source pedagogy and student learning but also for the long-term preservation and value of the materials to the institutions that support them” (Press & Meiman, 2020, p. 109).

**The Growth of Digital Primary Sources**

Today, a multiplicity of formats beyond the physical is available to users, with “unprecedented record production” beginning to “shift the focus on records to their point of creation” (Hamer, 2018, p. 165). The popularity of mobile devices encourages the creation of born-digital records and allows them to be circulated easily, causing “the ephemeral nature of social media” to impact not only how archivists can “collect, preserve, and use records created with these technologies” but also how they are accessed by users (Nix & Decker, 2021; Sheffield, 2018, p. 102).

Similarly, information institutions are also digitizing their collections or judiciously selecting which parts of their collections become digitized (Craig & O’Sullivan, 2022; Evans & Welch, 2014; Hibbler, 2015; Visser et al., 2022). Digitized sources have become especially crucial alongside the growth of remote learning, and librarians frequently work to connect various instructors to relevant digitized resources for remote and hybrid students to utilize (Kiser et al., 2023). “Libraries, museums, and other institutions of cultural memory around the world are digitizing significant portions of their holdings and making them available online—a trend
that, if continued, should greatly democratize access to special collections” (Craig & O’Sullivan, 2022, pp. 95-6). Not only does digitization allow for less stress on fragile physical items, but it also allows users to experience increased accessibility to these primary sources without adhering to the process of visiting a physical location (Tanaka, 2021). Users who engage with digitized sources can interact with them digitally as opposed to physically and conduct their research with the surrogate item—the digitized primary source. The success of engaging with digitized items ties in with the fact that “[h]istorically, digital research has been implicitly stigmatized by suggestions that ‘real’ research is conducted in person at special collections libraries” (Craig & O’Sullivan, 2022, p. 96). This view is rooted in ableism and elitism surrounding assumptions about financial, geographical, and physical accessibility, arguably perpetuating a form of gatekeeping (Craig & O’Sullivan, 2022). Digitized sources allow greater accessibility “for students with disabilities, researchers without the ability or resources to travel, and instructors with hybrid courses or high student-to-primary source ratios” (Kiser et al., 2023, p. 498).

As a result, the clear need for increased access has become a strong priority in libraries and archives (Hensley et al., 2014; Henson & Spitler, 2021; Hibbler, 2015; Visser et al., 2022). “Overhauling descriptive and arrangement practices, digital metadata, outreach programs, and physical and online accessibility for differently abled people have allowed users to discover archival materials, realize their value, and facilitate their use” (Longo, 2019, p. 63). However, training students and instructors on how to use digitized primary sources is also warranted to promote archival and primary source literacy, including the ability to navigate and find items in libraries and archives, as well as how to utilize them in the classroom setting and beyond (Longo, 2019; Billeaudeau & Scott, 2019; Kiser et al., 2023). While students may use primary sources
within the context of the educational setting, they may be inspired to look to primary sources to further inform or explore their other interests (Longo, 2019).

Moreover, it is clear that digitization has been transformative in how instructors can implement the use of primary sources into their teaching and the added value of these sources to “spark increased student engagement” (Tanaka, 2021, p. 41). “The growing quality of digital resources has allowed instructors to rely more heavily on primary sources in the normal course of their teaching, whether by including them in their lectures or assigning students to engage with them through course assignments” (Tanaka, 2021, p. 41). The flexibility of using digitized sources promotes their use in the education setting and is democratizing as well as empowering for instructors and students, particularly when institutions do not house large physical collections (Tanaka, 2021; Kiser et al., 2023). Implementing the use of “hands-on activities with digitized primary sources” also gives student the chance to view research “as a process involving inquiry and discovery,” which can foster “a sense of excitement as students develop new research questions and explore topics of interest” (Hibbler, 2015, p. 99).

Though incorporating digitized primary sources into coursework has had its successes, there is also room for improvement, as echoed by issues concerning the challenges of the digitized format itself or an activity that specifically calls for the physical object (Kiser et al., 2023). Digitization of materials may be uneven, or digitized facsimiles of primary sources may offer a false sense of scale, failing to accurately depict physical qualities such as “weight, mass, smell, feel, etc.” or altogether lacking in metadata or paratext (Gadd, 2009; Tanaka, 2021, p. 43). “The most prominent challenge, unsurprisingly, is capturing the physical, sensorial aspect of primary sources in digital media (Tanaka, 2021, p. 41).
Even though digitized formats still have issues to be addressed, they are still a fine gateway to accessing primary sources (Kiser et al., 2023; Visser et al., 2022). Both physical and digitized sources constitute primary sources and possess unique qualities about them, and interactions with them may offer different experiences for users. However, even as surrogates, digitized primary sources can still inspire the use of physical primary sources. “[I]nstructors recalled students who, after working with digital facsimiles of primary source materials, made it a special point to see these objects in person whey they were able to travel on their own, and made sure to tell their instructor even after the class had ended” (Tanaka, 2021, p. 41). As a result, primary sources—digitized or physical—can be powerful tools for teaching as well as student engagement. Student interactions with primary sources can carry a significance that extends beyond the confines of the classroom.

Affect and Primary Sources

Due to their unique and limited nature, working with primary sources may occasionally create affective experiences among students (Craig & O’Sullivan, 2022). Though affect is sometimes used interchangeably with emotion, affect refers to “the positive or negative aspect of feelings” and is broader than emotion (Zhang & Jansen, 2009, p. 3396). While these responses can be subjective and unpredictable, they can heighten student engagement and motivation during primary source literacy instruction (Garcia et al., 2019; Hibbler, 2015). Instruction librarians can devise lessons that create opportunities for these affective interactions. This can be achieved by considering the many majors and career interests of students to advocate for the relevance of primary sources, deliberately acknowledging “their interests and backgrounds to create entry points” (Longo, 2019, p. 70).
Likewise, the primary sources themselves can possess an “aura” or “mystical energy that surrounds authentic historical artifacts” (Rauner Library, 2019, para. 1). Students can have “quasi-ecstatic experiences while using rare materials” due to direct interactions with primary sources that are meaningful to them or their interests (Craig & O’Sullivan, 2022, p. 94). Another study referred to this phenomenon as “the quasi-magical status of engaging with collections materials” with survey data showing the most frequent benefits of engagement with primary sources were relating to “an impressionistic, emotional connection with a tangible material object” (Kiser et al., 2023, pp. 498-499). “To be sure, one relies on the archive’s aura to get students excited about research” (Craig & O’Sullivan, 2022, p. 95). This sense of awe can occur naturally, though subjectively, when working with special collections across different disciplines. For example, students can experience a sense of awe from working with analog archival materials (Garcia et al., 2019; Kiser et al., 2023). Including opportunities for interaction with primary sources in their various forms across disciplines can potentially increase chances of affective experiences in the classroom and can serve to engage students through this sense of aura (Craig & O’Sullivan, 2022).

Primary Sources in the Business Classroom

Primary sources can also be used and explored in the business classroom as a tool for strengthening information literacy and examining business history (Gil, 2019). One such example is the existing “emphasis on case research using rich primary sources” (De Jong, 2021, p. 66). Various aspects of business history can be studied in their historical context with primary sources (De Jong, 2021). Primary sources can act as a “crucial guide to describe not just what has happened but also to interpret why events have unfolded as they have” when studying
business case scenarios (De Jong, 2021, p. 69). The development of cases offers opportunities for business historians and instruction librarians to utilize primary sources housed within archives (De Jong, 2021).

In addition, primary sources can lend themselves to guided information literacy sessions. One particular information literacy session executed in a marketing class had students review a variety of print sources and paired students in teams (Clarke & Flaherty, 2007). Each team crafted “mock magazine ads, developed sales pitches to dramatize the content of their sources, and described how they could be used to make marketing decisions and identify strategies” (Gil, 2019, p. 3). In a different marketing class, professors collaborated with a librarian who presented a “hands-on session” which introduced students to databases that would help them analyze marketing and supply chain information, working through an assignment which “included finding company, industry, and consumer/product information” (Gil, 2019, p. 3; Schroeter & Higgins, 2015).

Another study examined primary sources in the context of airplane and automotive inventions by focusing on the value of patents. Researchers created two workshops centering around patents in order to “introduce students to patents as primary sources that influence daily life” and broadened student ideas regarding how research could be strengthened by using primary sources (Garnai & Gauder, 2020, p. 2). Students participated in a mini-lecture, collaborative digital humanities projects, and used a patent searching guide (Garnai & Gauder, 2020). While the workshops were highly attended, the researchers planned to add more opportunities for students to share how patents fit within their studies and to also incorporate “an activity that asked students to identify what they liked, learned, and would suggest for future iterations of the workshop” (Garnai & Gauder, 2020, p. 9). They also aimed to create further
assessments that would ask students to articulate the value and need of patents. In creating this lesson based on primary sources and considering the inclusion of student feedback in future iterations of the lesson, librarians were able to note “the adaptability of these workshops so that other groups could appreciate these primary sources in a meaningful way” (Garnai & Gauder, 2020, p. 11). Aside from these approaches, there are still many other formats that could be used and accessed in the business classroom, offering students more opportunities to engage with different types of primary sources that complement their disciplines.

Applying Primary Sources in the Business Classroom

There are numerous strategies for using primary sources that can be implemented in the business classroom and beyond. This section includes suggested strategies that can allow instruction librarians to showcase primary sources in the undergraduate business classroom setting. These suggestions are rooted in the Guidelines for Primary Source Literacy, devised by the joint taskforce of the ACRL RBMS-SAA (ACRL RBMS-SAA Joint Task Force, 2018). These strategies inspired by the Guidelines for Primary Source Literacy can be implemented across a series of lessons or can be explored in part or in full within the context of high-impact one-off instructional sessions about primary source research methods (ACRL RBMS-SAA Joint Task Force, 2018).

The Guidelines for Primary Source Literacy are based on four core ideas: analytical, ethical, theoretical, and practical concepts. Analytical concepts focus on users working with primary sources in an analytical manner, working through “hypothesis, analysis, synthesis, interpretation, critical thinking, and evaluation” (ACRL RBMS-SAA Joint Task Force, 2018, p. 3). Ethical concepts pertain to “applicable laws and regulations, privacy rights, cultural context,
donor agreements, copyright, and intellectual property when working with primary sources” (ACRL RBMS-SAA Joint Task Force, 2018, p. 3). Theoretical concepts deal with “evidence, authority, power, authenticity, context, materiality, historical empathy, agency” and explore “resulting silences and absences by critically considering what sources were never created, what sources may no longer exist, and what sources are collected” (ACRL RBMS-SAA Joint Task Force, 2018, p. 3). Practical skills include “finding, accessing, gathering, and handling primary sources in a variety of formats and locations” (ACRL RBMS-SAA Joint Task Force, 2018, p. 4). Additionally, the Guidelines for Primary Source Literacy include the following learning objectives addressed in these suggested activities: conceptualize; find and access; read, understand, and summarize; interpret, analyze and evaluate; and use and incorporate (ACRL RBMS-SAA Joint Task Force, 2018). The application of practical considerations alongside these learning objectives is utilized heavily in the suggested activities, which helps students to realize primary source literacy and allows students to touch on the aforementioned core concepts.

**Gauging Student Interests and Accessing Prior Knowledge**

As a precursor to activities pertaining to primary source research methods, it is ideal to initially gauge student interest and access any prior knowledge students may have about primary sources and their application in order to begin their engagement with primary sources. This process is most closely tied to the core idea of engaging students in practical concepts surrounding primary source literacy. In the conceptualization learning objective, students are encouraged to distinguish from primary and secondary sources and “draw upon primary sources to generate and refine research questions” (ACRL RBMS-SAA Joint Task Force, 2018, p. 5). Taking students’ academic interests, career goals, and even some personal interests into account
can aid in decision-making processes behind which primary sources or pieces of a primary source collection can be highlighted in a lesson or activity. Instructors can select specific primary sources that have direct ties to students’ academic interests or career paths or guide students through the creation of a research question that pertains to their own career goals or field of interest and utilize primary sources to seek an answer. For example, students may explore research question such as: How has (a chosen profession, company, product, industry, etc.) evolved over (set period of time)? Which primary sources can be used to explore this? Though using primary sources in the undergraduate business classroom can utilize a broad array of business-related sources, specific career paths can also be represented through potentially selecting ledgers, advertisements, CEO papers, etc. While most students may have an innate interest in primary sources linked to their academic interests, learning more specifically about which aspects of their academic interest pique their curiosity can offer opportunities for motivation and potential affective experiences when working with these primary sources. By understanding and surveying what may interest students most, instruction librarians can use these interests to select primary sources that are potentially more likely to engage and motivate students as they interact with these primary sources.

Additionally, accessing prior knowledge is crucial, as it can help instruction librarians gauge how familiar students may be with primary sources. This can be accomplished through class discussion, surveys, or pre-work in which students can share how they would define primary sources and what might constitute a primary source. This can also open larger discussions pertaining to which types of primary sources students have used previously and the context or reason behind why they were accessing these sources, in addition to how these sources were accessed. Before giving students direct information about primary sources, a formal
definition, examples of primary sources, and why they may be relevant, it is worth exploring the skill levels students may already have in connection to primary sources in order to build a lesson that can accommodate new and veteran users of primary sources. For example, one can ask students the following questions:

- How would you define a primary source?
- What is an example of a primary source?
- Have you used a primary source before?
  - If so, why?
    - Was this related to an academic interest or a personal interest?
    - Which type of primary source did you use?
    - How did you access the primary source?
    - What was the format of the primary source?
    - What information did you gain from the source?

Connecting undergraduate business students to primary sources in the business context is also critical, as addressing this connection can showcase the wide range of primary sources used and valued by businesses in order to document business and industry-related history. Moreover, this can lead to rich discussions relating to primary source format—physical, digitized, and born-digital—in addition to addressing the pros and cons of each format, why these source formats are relevant, and why they are worth preserving.

**Opportunities for Collaboration**

If one is not well versed in primary sources available physically or digitally within an institution, it is effective to seek opportunities for collaboration in an effort to learn more about
key collection items pertaining to any discipline (Kiser et al., 2023). This of course include the possibility of showcasing primary sources as research assets in the undergraduate business classroom. The ability to find and access appropriate sources is the second learning objective in the Guidelines for Primary Source Literacy, and is one that offers opportunities for collaboration in addition to further strengthening student experiences with the core idea of practical concepts (ACRL RBMS-SAA Joint Task Force, 2018). When seeking sources to utilize in the undergraduate business classroom, one can explore the contents of their academic institution’s library or archives to learn which pieces of the collection may be considered relevant or particularly significant to undergraduate business students. Pieces that highlight the stories of well-known businesses, products, or notable individuals can potentially capture the interests of students due to the students being at least somewhat familiar with the business, product, or individual. Taking note of the format of the source is also important, and seeking digitized items for use in the classroom can be ideal for students and instruction librarians.

There are various digitized sources available through the Library of Congress, Hagley Museum and Library, and different academic institutions previously mentioned in this paper, which allow for easy access to primary sources pertaining business and other disciplines. Many digitized primary sources are text-based, while others carry audio-visual components, offering instruction librarians the opportunity to offer students sources that cater to different learning modalities. Instructors can create activities that encourage students to use these resources and locate either a specific source predetermined by the instructor as a scavenger hunt-style exercise or tied to a research question devised by the students or instructor. Here, students are encouraged to “identify the possibly locations of primary sources” and “use appropriate, efficient, and effective search strategies in order to locate primary sources” (ACRL RBMS-SAA Joint Task
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Force, 2018, p. 5). In doing so, they can begin to distinguish between online resources and understand policies that “affect access to primary sources” (ACRL RBMS-SAA Joint Task Force, 2018, p. 5). In addition, students may also start to consider that “historical records may never have existed, may not have survived, or may not be collected and/or publicly accessible” (ACRL RBMS-SAA Joint Task Force, 2018, p. 5).

Whether one is a student or faculty member, learning more about potential collection items can occur by working with an archivist or special collections librarian to gain a stronger understanding of which sources might be the most meaningful to use in the classroom. While affective experiences among students are unpredictable and subjective, having learned about students’ academic interests and career goals can further serve to inform which primary sources might be highlighted in a particular activity. Though it is likely that the digitized versions of these primary sources will be most appealing for instructors to use with their students, working with the digitized items can potentially engage and inspire students enough to pursue visiting some of these collections or archives in-person to interact with the physical item, if possible, promoting the overall consultation primary sources as a research tool (Kiser et al., 2023).

Activities Involving Primary Sources

There are various activities which can be implemented in the undergraduate business classroom to promote student engagement with various types of primary sources. These activities aim to address the learning objectives of “read, understand, and summarize;” “interpret, analyze, and evaluate;” and “use and incorporate” (ACRL RBMS-SAA Joint Task Force, 2018, p. 5). Here, students actively engage in the core ideas of analytical, ethical, and theoretical concepts, employing critical thinking skills as they use sources to formulate their research questions,
consider the complications of what is preserved and why, and explore how to appropriately use and acknowledge primary sources in their work (ACRL RBMS-SAA Joint Task Force, 2018).

Though there can be many approaches to applying primary sources, as a starting point, an instruction librarian may wish to point out select, specific sources to the students and to guide students through an activity relating to accessing, navigating, and analyzing these sources. In particular, these activities could be tied to one overarching subject, such as an entity, individual, or product, after a brief lesson that familiarizes students with the subject, offering more context to the primary sources that will be explored. The process in which students are guided through the selected primary sources can also vary. This can include creating a worksheet or set of class discussion questions that ask students to consider the source before them and explore not only the item itself but the information that can be gleaned from it. In this fashion, students address the objectives of “read, understand, and summarize” in addition to the objective of “interpret, analyze, and evaluate” (ACRL RBMS-SAA Joint Task Force, 2018, p. 5). Similarly, affective experiences may come into play when engaging with a primary source. It may also be useful to have students consider their emotions or general reactions to working with a specific primary source, perhaps even across varying formats of that same source. An instruction librarian could devise an activity that asks students to consider the following questions when viewing or interacting with a primary source:

- Which type of item is this primary source? (Book, journal, photograph, etc.)
- What information could you potentially gather from this source?
- What general reactions do you have to this source?
- Does seeing this source lead you to have any emotional reactions?
  - If so, what emotional reaction do you have? Why?
How could this source have been useful during the time of its creation?

What do you find most valuable about this source today? Why?

These questions could also be modified to fit a specific collection that is focused on a particular person, entity, or product. Likewise, this activity could be carried out in a jigsaw style, in which students are broken into small groups. Each group would receive a different primary source, respond to the questions at hand, and present the source and their responses to the class. In the end, students not only familiarize themselves with the contents of a source but also consider its greater implications through interpreting, analyzing, and evaluating its existence and use (ACRL RBMS-SAA Joint Task Force, 2018). Moreover, students can “[f]actor physical and material elements into the interpretation of primary sources including the relationship between container [...] and informational content, and the relationship of original sources to physical or digital copies of those sources” (ACRL RBMS-SAA Joint Task Force, 2018, p. 6). They can meet the goal of being able to “identify and communicate information found in primary sources” through reviewing the information within the source but can also explore the “tone, subjectivity, and biases” of a source as well as situating it “in context by applying knowledge about the time and culture in which it was created” through careful analysis of how that information is being communicated through a particular source as a product of its time (ACRL RBMS-SAA Joint Task Force, 2018, p. 5).

In addition, instruction librarians can create activities that allow students to learn how to navigate primary source collections in order to find sources relevant to their work or research. Students can utilize primary sources for an assigned project in which they may research a specific entity, person, product, career interest, etc., and incorporate primary sources as cited evidence in their research. In doing so, students can “examine and synthesize a variety of sources
in order to construct, support, or dispute a research argument” (ACRL RBMS-SAA Joint Task
Force, 2018, p. 6). As they encounter primary sources applicable to their research, they can
practice using “primary sources in a manner that respects privacy rights and cultural contexts,
cite primary sources in accordance with appropriate style guidelines” and “adhere to copyright
and privacy laws when incorporating primary source information in a research or creative
project” (ACRL RBMS-SAA Joint Task Force, 2018, p. 6). Offering students the occasion to
navigate and apply primary sources in their research can aid in their development of primary
source literacy skills, especially when strengthened by opportunities for motivation and choice in
terms of the subject the students are researching. Connecting students’ interests to relevant
primary sources can potentially increase their likelihood of having affective experiences when
engaging with the primary sources because the sources are meaningful and pertinent to them and
can further encourage them to “[d]emonstrate historical empathy, curiosity about the past, and
appreciation for historical sources” (ACRL RBMS-SAA Joint Task Force, 2018, p. 6).

**Reflection and Feedback**

When primary sources are selected at the discretion of the instructor upon surveying the
career interests, fields of study, and even suggestions from incoming or outgoing students when
applicable, reflective assignments can also be built to allow students to reflect upon primary
sources and apply critical thinking skills to better understand these sources and the information
contained therein. As one option, students could journal about the primary sources they found in
connection to their research needs or write about their experiences interacting with primary
sources from an instruction librarian-selected list for further practice in the “interpret, analyze,
and evaluate” as well as “use and incorporate” learning objectives (ACRL RBMS-SAA Joint
Task Force, 2018, pp. 5-6). In other cases, students could conduct source analysis or format comparisons, citing what is gained or lost across transitions in material format for additional practice with the “interpret, analyze and evaluate” learning objective (ACRL RBMS-SAA Joint Task Force, 2018, p. 5). For example, students could work with other primary sources from archives that have written as well as audio-visual components that accompany them, exploring how one format may inform the other. Having students reflect upon their experiences with primary sources and examine why these sources may be valuable in a business or research setting can help them form a stronger understanding of the relevance and applicability of these sources.

Offering ample opportunity for student feedback and reflection before and after the lesson allows for the instruction librarian to potentially reimagine aspects of the lesson to better suit the needs and interests of students. This is not only beneficial from an instructional standpoint but may also be helpful to students; for example, one instructor requested that students “think of a research tip that they would share with a classmate,” tying in with the ability to conceptualize the use of primary sources and their place in the research process (Hibbler, 2015, p.99). As reflective practitioners, instruction librarians can welcome the feedback of students in the form of reflective assignments, such as discussion posts, exit slips, or other deliverables, to assist them in evaluating the strengths of their lesson as well as areas for revision. This could include the selection of different sources and offering variations of in-class activities or assessments. Welcoming student feedback also offers students the chance to pose any questions they still may have about primary sources, share which aspects of the lesson were most meaningful to them, and note which elements the lesson or primary sources sparked their curiosity. As further iterations of these primary source research methods activities are created,
student feedback can help reshape these activities into ones that are all the more specific to the interests and needs of the students in the undergraduate business classroom.

**Conclusion**

While there are many methods for applying primary source research methods in the classroom, the activities discussed in this literature review offer a suggested approach for using primary source research methods in the undergraduate business classroom. These activities are inspired by the Guideline for Primary Source Literacy and draw from Archival Intelligence Theory with an aim to increase primary source literacy and critical thinking skills among students. Additionally, this approach gives instruction librarians the opportunity to showcase digitized primary sources as well as incorporate a broad range of relevant sources that would interest a wide breadth of students when adjusted for students studying disciplines beyond business.

Moreover, working with a variety of primary sources can offer students the opportunity to affectively connect with the materials at hand. Though affect is subjective and not mandatory to conduct research, it is often sought as a supplement to the research process by the researchers themselves; therefore, considering the interests and fields of study of students can inform which primary sources are selected from use from physical and digital archives. Similarly, developing assignments around primary sources, allows students the opportunity to engage with and think critically about primary sources as well as their use and the context in which they were developed.

Whether made accessible in their original physical state or as digital surrogates, working with primary sources can be fruitful to the research process across a wide range of disciplines.
Developing educational content in relation to primary source research methods can offer significant opportunities for instruction librarian collaboration with special collections librarians, archivists, etc. while showcasing and offering stronger exposure to special collections housed in their institutions (Kiser et al., 2023). Building primary source research methods activities into undergraduate business course curricula and beyond can offer students the foundation to think critically about primary sources, their purpose, and application, as well as information about the context in which these sources were originally created. In addition to increasing students’ primary source literacy alongside other forms of literacy and course content, the inclusion of primary source research methods will ideally encourage students to be more confident in using primary sources within their research, motivate them to engage with primary sources of varying different formats, and inspire them to note the unique value of primary sources as powerful research tools.

References


