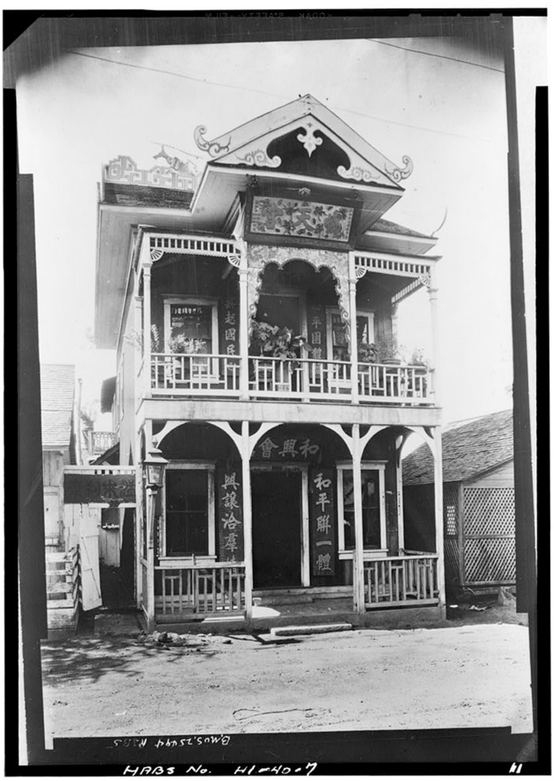
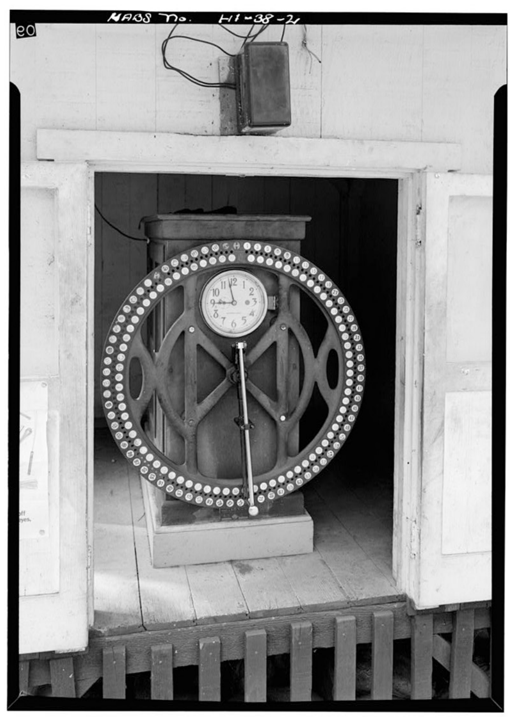
RBM:

A Journal of Rare Books, Manuscripts, and Cultural Heritage

Volume Twenty-Four, Number 2, Fall 2023





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Historic American Buildings Survey, Creator. Pioneer Hotel, Front & Hotel Streets, Lahaina, Maui County, HI. Maui County Hawaii Lahaina, 1933. Documentation Compiled After. Photograph. https://www.loc.gov/item/hi0013/.
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Diane Dias De Fazio

Editor's Note

It's harder than one might think, writing your first Editor's note for a storied publication. There are so many things to mention, and so many clichés to avoid. Take the "Here's what to expect in this issue" approach, and an Editor might feel they'd taken the easy way out; expend words on personal philosophies, and hazard alienating readers from the outset. Compromise and offer a bit of both? —Well, that would be too obvious. Besides, someone will, eventually, ask: Writing, eh? Is that still a thing?

This issue of *RBM*, hyperbole aside, marks the start of a new era. I am grateful and honored to follow Dr. Richard Saunders, Dr. Jennifer Sheehan, and esteemed editors and editorial boards that established *RBM* as a noteworthy journal.

This issue is lean, but is presented with a promise: it will be followed by volumes that emphasize and showcase your work in greater depth. You, dear RBMS community, are doing great and important things. It's time they were illuminated in print. *RBM*, going forward, will continue to reflect on our organization, and provide recommendations for the Section's path forward. There will be articles in languages other than English. There will be essays that chronicle our presence and assess the impact of our activism. There will be essays based on recent RBMS conference presentations. Additionally, I hope to further emphasize the "Cultural Heritage" aspect of this journal's title by working with public historians, museum educators, and our colleagues in the art librarianship community. This journal will be a platform for booksellers, early- and mid-career authors, students, collectors—and as many voices that previously felt *RBM* was not for them—as possible.

It is my goal to provide early-career professionals and global voices with an outlet in which to share their work and perspectives. This starts with being an open door in terms of any and all questions and suggestions!

RBMS has a solid track record of providing funding to attend the annual conference to individuals who self-identify as part of an underrepresented group. It is my mission to bring those voices to the journal, starting with reaching out to the lists of scholarship awardees and those who submitted proposals for the Power of New Voices sessions. And as a Latina, a person who grew up in Appalachia, and a person with a disability, I represent at least three groups that have, so far, not been widely heard in special collections librarianship writing. I hope that my presence will inspire—or infuriate—librarians and archivists, enough to spur creative and discussion-provoking submissions.

For the record, some topics I would like to see in future *RBM* issues include (in no particular order):

- Climate resilience and reevaluation of prior scholarship
- Censorship
- The future of special collections librarianship
- Protection services and security
- RBMS membership statistics
- Work/life balance: caregiving, work-from-home, post-COVID working landscape
- Twentieth-century duplicative technology, zines, and artists' books
- Bibliography outside the U.S. and Western canon—looking toward the Caribbean, Africa, and non-western languages

RBM is a public service and has a responsibility to its members, and it operates under the good graces of ACRL and the RBMS Executive committee. I hope to engage more with our ACRL reps and RBMS's Executive Committee, perhaps even publish a Chair's message and/or something from the conference co-chairs in future Spring issues, timed to coincide with the annual conference.

In the meantime, share your ideas, and get to know me and the *RBM* Board a little better! Applications to volunteer with us open in December on the ACRL portal. We look forward to hearing from you.

Finally, a note on the cover, which reflects on the importance of documentation of non-white stories and experiences. Shown are images of places lost in the August 2023 fires of Lahaina, Maui, Hawaii. Documented as part of the Historic American Buildings Survey (HABS) in the 1960s, the images exemplify the role of special collections to preserve—and make visible—immigrant, migrant, and working-class histories that might have otherwise gone overlooked.

Volunteer for the *RBM* Editorial Board!

Are you a(n):

- abolitionist,
- archivist,
- (book) artist,
- bookdealer,
- collector,
- conservator,
- documentarian,
- humanities or human information interaction researcher,
- LIS (or any other) faculty,
- museum professional,
- preservation officer,
- special collections librarian,
- student,
- or otherwise interested in academic publishing from a special collections and cultural heritage perspective?

Volunteer to serve on *RBM*'s editorial board through ACRL!

What you need to know:

- Applications are reviewed by the *RBM* editor
- Applications are accepted December 1, 2023–February 28, 2024
- Make sure your membership in ALA/ACRL is up-to-date; volunteers must be an ALA/ACRL member at the time of application and appointment
- Board members serve three-year terms
- Members may serve two consecutive terms (for a total of six years)
- It is helpful to have familiarity with *RBM*'s past issues
- Academic writing and publishing experience is useful, but not required

Board Members are expected to:

- Serve as peer reviewer for article submissions
- Attend and participate in virtual board meetings (twice a year, typically in January and June)
- Promote the journal amongst personal and professional networks
- Recommend authors and/or topics for *RBM*

The official charge:

The editorial board "serves in an advisory capacity to the editor on the contents of the journal issues; the board members form the core of referees, reviewing manuscripts submitted for possible publication."

RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage is the publication of record for RBMS, and an open-access journal of the Association of College and Research Libraries (ACRL). Past *RBM* content has covered RBMS activities and membership, new models for collecting, cataloging and technical services, primary source library instruction, the creation of strategic partnerships, and how special collections make a variety of stories accessible.

Considering it? Potential applicants may contact a sitting board member or the editor with questions ahead of formally volunteering! Contact information is available on the *RBM* website and on the editorial page of the print journal.

Manuscript Submission Guidelines

Manuscript submissions for *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage*, along with related questions, should be sent to the editor, Diane Dias De Fazio, at diane.diasdefazio@gmail.com.

Overview

RBM is a peer-reviewed journal publishing articles on the theory and practice of library special collections, archives, cultural heritage institutions, and related fields. Content in *RBM* generally assumes two forms: articles and reviews.

Deadlines

Fall Issue: July 15

Spring Issue: January 15

Submission and Publication Process

- Contact *RBM* editor via email before sending manuscript(s) to discuss topic(s), length, illustrations, or other issues prior to submission.
- Submit email attachments in MS Word (.docx) to the editor.
- Submit original, unpublished articles only. Contributions published elsewhere or under consideration by other journals are ineligible for publication in *RBM*.
- Authors are responsible for the accuracy of the statements and sources in their articles.
- If the article was presented at a conference, identify the conference by name, sponsoring organization, and date.
- If approved, authors will be asked to provide 150-word biographies for all contributing authors.
- *RBM* uses an identity-hidden peer review process to review all submissions. Two readers and a member of the *RBM* editorial board are assigned to each article. Authors receive reviewer feedback, in addition to a publication decision from the editor.
- At acceptance after peer review, authors are provided with a timeline for revision and re-submission.
- Authors are asked to sign and submit the ACRL publications agreement form, in which ACRL asks for "the non-exclusive right to print, publish, reproduce, and distribute your work both in print and online. ACRL also has the right to use your name in association with the article for advertising purposes." Additional information may be found in the ACRL Publications Agreement FAQ available at https://www.ala.org/acrl/publications/publicationsfaq.
- Authors receive a copy of the first-round page proof of their article to proofread.

Content

- Articles may take the form of theoretical or scholarly submissions, revisions of conference presentations, articles that describe specific libraries or collections, interviews, or historical articles. Articles may address membership and Section assessments, acquisition and collection development, access to and use of special collections, conservation and preservation, cataloging and technical services, protection services and loss prevention, fundraising and donor relations, digital humanities, exhibition preparation, trends in the antiquarian market and collecting; and other topics. Articles must relate to special collections librarianship, archives, or museum practice, and the writing style should be formal. Authors are asked to avoid use of the first-person voice.
- Articles should be 3,000 to 5,000 words, plus any accompanying tables, charts, or images. Maximum length for an article is 8,000 words. Average article length is 2,500 to 5,000 words.
- Copyright clearance and permission for publication for any portion of the submitted article, including images, must be obtained, *in advance*, by the author.

Style and Form

- Articles must be double-spaced.
- Each article will include an author credit consisting of the author's name, position title, institution, and email address.
- A 200-word abstract should precede the body of the article.
- Articles must follow the "Notes-Bibliography" and style guidelines provided by the latest edition of *The Chicago Manual of Style*. Bibliographical references should be consecutively numbered throughout the manuscript, and formatted as footnotes. Bibliographies are not included in published articles.
- Articles must be submitted in English, using American spellings, following *Merriam-Webster's Collegiate Dictionary* (currently the eleventh edition) for preferred spellings of words.
- Articles submitted in languages other than English must also provide an English-language copy of the text.
- Submissions will be edited for content, style, spelling, grammar, and syntax. Editor makes final decisions about journal content and form.
- Acknowledgements, if any, should appear at the end of the article.

Visual Materials

- Authors are encouraged to send illustrative material with their submissions.
- Charts and tables should be submitted as separate Word files, captioned, and otherwise clearly identified. Indicate the desired placement in the text by adding an instruction in parentheses; *e.g.*: (Insert table 2).
- TIFF files are preferred for illustrations. Files should have a minimum of 300dpi.
- Full captions should be submitted for all images, including information regarding copyright permission, source of image, and photographer credit.

CONTRIBUTORS

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Clare Withers (she/her) is Curator of the Elizabeth Nesbitt Collection of children's literature at the University of Pittsburgh Library System (ULS), Archives & Special Collection and also serves as Liaison Librarian for Children's Literature, Cultural Studies, and Medieval & Renaissance Studies. Clare and a few Pitt colleagues developed a toolkit for use in planning, delivering, and assessing primary source learning. The vetting of the toolkit continues and recently expanded into a nascent community of practice that includes Pitt instructors and colleagues from other libraries and cultural heritage institutions. She began her career as a Children's Librarian with the Carnegie Library of Pittsburgh, a position she held for 15 years. Clare received her MLS from the University of Pittsburgh and earned her BA in English from Duquesne University.

Colleen W. Barrett and Sarah M. Horowitz

Topics of Discussion: An Analysis of the RBMS Conference 2009–2021

This paper examines both the presentation content and institutional representation of the Rare Books and Manuscripts Section (RBMS) of the Association of College and Research Libraries (ACRL) of the American Library Association (ALA) conference from 2009 to 2021. An analysis of types of presentations and presentation topics reveals that types of sessions and session topics are consistent throughout the years. Presentations with a diversity focus remain low, despite an RBMS commitment to increase diversity, equity, and inclusion throughout the section. Multiple presenters from a single institution are common at the conference. There are few local presenters at the RBMS conference, but non-academic institutions are represented at all of the conferences studied. Taken together, these all have an influence on how RBMS creates and thinks about important work, standards, and best practices in the special collections field.

Introduction

Since its founding in 1958,[1] the Rare Books and Manuscripts Section (RBMS) of the Association of College and Research Libraries (ACRL) of the American Library Association (ALA) has been a reflective and self-reflective organization. This has included membership surveys and publications about their results,[2] articles on the history of the section,[3] analyses of the section journal,[4] a keepsake volume documenting the first fifty years of the RBMS conference,[5] and a recent opening

1. "Introduction," RBMS Manual, revised June 2002, https://rbms.info/rbms_manual/introduction/#history.
2. Elspeth Healey and Melissa Nykanen, "Channeling Janus: Past, Present, and Future in the RBMS Membership Survey," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 17 no. 1 (2016): 70–1, https://doi.org/10.5860/rbm.17.1.461.
3. Anna Lou Ashby, "RBMS: An Overview," *Rare Books & Manuscripts Librarianship* I (1986), 7–9; Alice Schreyer, "RBMS at 30: Growing Along with the Profession," *Rare Books & Manuscripts Librarianship* III (1988), 3–7.
4. Melanie Griffin, "The Past, Present, and Future of Special Collections Library Literature," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 21 no. 2 (2020) https://doi.org/10.5860/rbm.21.2.63.
5. R. Arvid Nelsen with Terry Belanger, *A Commemorative Keepsake Volume Celebrating the Fiftieth Anniversary of the Rare Books and Manuscripts Section of the Association of College and Research Libraries* (RBMS: 2009).

keynote explicitly framed around a previous one.[6] Looking back at the past dozen years of the RBMS conference provides us with an opportunity to see "where we have been, who we are, and perhaps where we are going."[7]

In this study, we examine the content and institutional representation of the past twelve years of RBMS conferences. We consider both content and institutional representation to be important indicators of the state of the field and the range of perspectives available at the RBMS conference. First, we seek to determine what trends exist in the types and topics of presentations. Given RBMS's commitment to diversity, equity, and inclusion, we also looked for presentations which include diverse topics. Second, we sought to determine what types of institutions were represented by presenters. We wanted to see if institutions appeared on the program multiple times, how closely speakers were connected with the local community where the conference was held, and whether there were many types of institutions represented by presenters at the conference. Conference presentations, which often have a lower barrier of entry than published scholarship, offer a window into both who is working in the rare books and manuscripts field and what they consider worthy of study.[8]

RBMS Conference Background

The first RBMS preconference was held in 1959, and RBMS has held an annual conference since 1961.[9] Other ACRL sections have held preconferences, but RBMS's has been described as "most notable in this area," and is the only one that is directly mentioned in its history section of ACRL.org.[10] While there are various types of sessions that often happen at RBMS conferences, including plenaries, seminars, papers/panels, workshops, participant-driven sessions, and posters,[11] none are required and some have changed over time. The RBMS Conference Program

6. Tamar Evangelista-Dougherty, "Reflection: The Changing Field" (Opening Plenary, RBMS Conference, June 21, 2022).

7. Edward A. Goedeken, "What We Wrote about and Who We Were: Historical Writings in 'JLH'/'L&C,' 1966–2000," *Libraries & Culture* 38 no. 3 (2003): 250–65.

8. Dorothy J. Berry (@dorothyjberry), "Another hot take as this site is in flames: in a field like LIS where most folks are doing practical vs. theoretical work, it has always been interesting to me how folks in professorial/faculty/doctoral positions get cited as the leaders in certain areas because they publish," Tweet, Nov. 11, 2022, https://twitter.com/dorothyjberry/status/1591084373730033665, and Berry, "For most folks doing an innovative processing project or a field expanding program, the best case is to present at a regional conference and share steps with other working colleagues, but that work is never cited on par with someone who publishes on work they theorized," Tweet, Nov. 11, 2022, https://twitter.com/dorothyjberry/status/1591084375097024512.

9. "Past RBMS Conferences / Preconferences," https://rbms.info/conferences/#past.

10. Mary Ellen Davis and Mary Jane Petrowski, "ACRL History," https://www.ala.org/acrl/aboutacrl/history/history.

11. Appendix 1, "RBMS Conference Planning Manual," revised January 2019, https://rbms.info/wp-content/uploads/2022/05/Conference_Planning_Manual-2022.pdf.

Planning Committee has often made changes to the conference structure.[12]

Different aspects of the RBMS conference are overseen by different parts of the organization. The conference location is selected by the Conference Development Committee and approved by the Executive Committee. Traditionally the site is designed to be geographically near the ALA annual conference so that members can attend both. Conference themes are selected by the conference program planning chair(s) and do not have to be related to the location of the conference. Conference program planning chair(s) are selected to chair a specific conference; they have been selected in different ways, but in recent years the RBMS chair has generally issued a call for proposals. The Conference Program Planning Committee, which changes for each conference, oversees all programming except for seminars and workshops, which are overseen by their respective committees and are not required to be associated with the theme of the conference. This provides another method of distributing the work of conference planning and session review. This committee-led selection process, incorporating many volunteer committee chairs and members, ensures that a wide range of library workers are involved in the organization of one of the major research distribution methods of special collections scholarship in the United States.

Literature Review

Content analysis is used fairly widely in library literature for a variety of purposes.[13] Conference proceedings can be a valuable way of learning about new areas of interest and development for a profession as well as learning from the experience of others.[14] Garner, Davidson, and Williams analyzed how conference topics changed over time in the proceedings of The North American Serials Interest Group (NASIG) from 1986 to 2005. They found that the conference had various types of presentations. There were a number of consistently frequent topics across the conferences, but their popularity varied from year to year. They also noted that conference analysis tends to focus on presenters rather than topics.[15]

Despite the self-reflective nature of RBMS discussed above, there has never been a content or speaker analysis of the RBMS conference. The 2009 keepsake listed titles of

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12. RBMS Conference Planning Manual, revised 2019, https://rbms.info/wp-content/uploads/2022/05/Conference_Planning_Manual-2022.pdf; Richenda Brim and Athena N. Jackson, "Retrofitting a Name: The New RBMS Conference, Leaving the "Pre" in the Past" *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 16 no. 1 (2015): 17.
13. Kelly Blessinger and Michele Frasier, "Analysis of a Decade in Library Literature: 1994–2004," *College & Research Libraries* 68 no. 2 (2007): 155–69, https://doi.org/10.5860/crl.68.2.155.
14. John C. Rowley, "The Conference Literature: Savory or Acrid?" in *Conference Literature, Its Role in the Distribution of Information: Proceedings of the Workshop on Conference Literature in Science and Technology May 1–3, 1980*, ed. Gloria J. Zamora (Marlton, N.J.: Learned Information, 1981): 11–20.
15. June Garner, Karen Davidson, and Virginia Kay Williams, "Identifying Serials Trends through Twenty Years of NASIG Conference Proceedings: A Content Analysis," *Serials Review* 34 no. 2 (2008): 88–103.

presentations and speaker names and affiliations but did not offer any analysis of the conference itself. In reflecting on the name change from the RBMS Preconference to the RBMS Conference, Brim and Jackson discussed the importance of hearing from new members and the types of sessions but did not discuss particular presentation topics.[16]

The content of articles in the RBMS journal, *RBM,* has been studied. Griffin noted that 84 percent of articles in *RBM* are single-author studies, while 70.5 percent were from some type of academic institution.[17] She also noted that the most frequent institutional affiliations represented are large research institutions and members of the Association of Research Libraries (ARL).[18]

Because there are written documents, it is easier, and thus more frequent, for analyses of literature in a field to focus on scholarly journals or published conference proceedings rather than conference presentations. Select RBMS conference papers are published in *RBM*, and some sessions are recorded, but RBMS does not issue proceedings. Conferences are important, however, because they are one place where professional standards are set. Thomas noted that

> of 145 listed presenters [for RBMS 2016], 80 (55%) were from ARL member libraries. Of the 65 remaining presenters from non-ARL libraries and organizations, 11—about 17%—were from institutions within the state of Florida (that is, within driving distance), which means that only 37 percent of presenters were from non-ARL libraries not within driving distance."[19]

Presentations at RBMS help to set standards for the profession,[20] and not having smaller institutions represented may impact the scalability and sustainability of profession-wide discussions, work, and guidelines.

Methodology

Our dataset ran from the 2009 RBMS preconference to the 2021 conference. We chose to begin in 2009 for several reasons. First, the fiftieth anniversary RBMS conference was held in 2009. As part of that conference, a keepsake detailing all presentations at previous conferences was produced. Nothing has been done to colocate information on RBMS conferences since then. Second, RBMS approved

16. Brim and Jackson, 17.
17. Griffin, 71.
18. Griffin, 73.
19. Lynne Thomas, "Special Collections on a Shoestring: A Survey of Non-ARL Libraries Servicing Rare Book Collections," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 23 no. 2 (2022): 88.
20. Thomas, 88–89.

the change of name from "preconference" to "conference" in 2015, meaning we had roughly equal data on both sides of this change. While part of the idea behind the name change was to recognize the size and scope that the preconference had already achieved,[21] we wanted to see if there were any obvious changes following this transition. The 2021 conference was included in the set since it was originally conceived as an in-person conference in 2020, but we omitted the 2022 conference as we collected the data before it occurred.

We chose to focus on the RBMS conference alone because it is the main conference devoted to rare books and manuscripts librarianship in the United States. While many RBMS attendees may also attend and present at related professional conferences such as the Society of American Archivists (SAA) or The Society for the History of Authorship, Reading, and Publishing (SHARP), or more general library conferences such as ACRL or ALA, we focused on RBMS because of its specialized nature.

To collect our data, we used the conference websites linked from the RBMS website and one printed conference program.[22] We submitted a request for Institutional Review Board (IRB) consideration at the University of Kentucky on March 28, 2022, and received notice on April 7, 2022, that this project did not require IRB review.

In reviewing the conference websites, we first gathered a dataset for each conference year of the session type, as described by the program (e.g., "plenary," "seminar," "paper," with an occasional additional title for the entire session type, such as an overall papers description), presentation title, and the name of each institution affiliated with that presentation. We did not track individual participant names or any identifying information about them other than the institution that they designated as their affiliation.[23] We did not include sessions which required extra payment beyond the conference registration fee (such as workshops), or things that were "off-site," or in which limited numbers of attendees could participate (such as tours or hands-on activities).

For the sake of analysis, two different sets of total data points were considered related: sessions and presentations. Session numbers indicate time slots filled in the program, not named presentations that comprise the different parts of a session, such as a titled paper within a paper panel or a poster title in a poster session. In other parts of the analysis, we look at specific named presentations when available, for instance, coding topics of each paper or poster if that information is available. Therefore, the total

21. Brim and Jackson, 15.
22. "Past Conferences," https://rbms.info/conferences/#past. The printed program was for 2015 as the conference website was no longer entirely functional, as of this writing. This served to further show the importance of data management, archiving of conference content, and future planning for section history.
23. The authors acknowledge that affiliations of presenters may change between the time of their proposal and their presentation at RBMS conference.

numbers for "sessions" and "presentations" are different throughout this analysis, as they represent different things.

First, we condensed the session types into smaller categories for data analysis. For data analysis, we determined the most regular categories of session types to be plenaries, seminars, short papers, discussion groups, poster sessions, unconferences, case studies, participant-driven sessions, and "other." Short papers were sometimes listed on conference websites as "short papers," "papers," or "paper panels," but were all counted here as short papers. Discussion groups were also described as "discussion sessions" or just "discussion." We included in "other" anything that did not fit into one of the previous categories. For example, in 2019 the other sessions were "pop-up sessions," and in 2021 they were "people's choice." All remaining types of sessions were described as such on the dataset's conferences' websites. We adhered to the category listed on the conference program even if the title of the session had a different description another year, such as the "unconference" in 2012 that was listed as a "discussion session" on the conference website.

We coded presentation topics as one of the following: technical services, public services, curation and collection development, management and administration, book history and bibliography, conservation and preservation, digital scholarship and digitization, bookselling, instruction, security, archives, self-reflection, and other. Each presentation was coded for only one topic; if a presentation seemed to cover multiple topics, we either coded it as the one that seemed to be the true primary topic or used "other" to indicate multiple topics of equal importance. We used only the information from the session and presentation title when coding. "Technical services" encompassed presentations that focused on processing, cataloging, and metadata. "Public services" included research assistance, scholarly engagement, outreach, social media, exhibitions, community partnerships, and discussions of access; "instruction" was coded separately due to its status as a recently emerging topic in the special collections discourse. In addition to what and how to collect, "curation and collection development" included acquisitions, work with donors gifting materials, and collection appraisal considerations. "Management" included administration topics, leadership, fundraising, and budget discussions. "Book history and bibliography" included textual studies, publishing history, or literary scholarship. "Conservation" included discussions of both conservation and preservation work or activities. Discussions of digitization and digitization projects were included as part of "digital scholarship and digitization." Discussions of manuscripts, records, and archival collections as well as working with these materials under the title of archivist were coded as "archives." "Self-reflection" included sessions with metacommentary on RBMS and its history, the special collections and library profession, and labor issues. In addition to presentations spanning multiple categories, things that we coded in "other" were presentations where the topic was not clear or involved building renovations, interlibrary loan, and assessment.

For a session to be coded as having a diversity focus, we sought awareness from the session or presentation title of this concept. Though we recognize that much of rare books scholarship is Anglo-American or European-centric, we did not code a session as diverse only for engaging with a certain type of collection. Presentations coded as engaging with diversity in some way included those that talked about bringing marginalized groups into the field; projects working to benefit underrepresented communities; those focused on authority sharing/decentering of the information professional; explicit discussions of power dynamics; reparative, welcoming, and inclusive description; liberation; and bringing collections back to their originating communities. Some topics, such as labor practices and the gig economy, were not necessarily coded as diverse since they may only deal with the struggles of majority groups. We did not consider community partnerships as inherently diverse for the same reason.

In a separate process, we also gathered each institution represented from each year into a list and determined which ones had more than one—but fewer than five—presentation slots, and which institutions had more than five.[24] When counting institutions for institutional representation, we defined anyone with any role at a particular institution as being from that institution, regardless of their self-classification. For instance, presenters from both the Beinecke Library and Sterling Memorial Library at Yale were counted as "Yale University." There is no standardization in the way that people define their affiliation, with some people giving a specific library and others simply the larger institution. For the sake of data clarity, we used the larger designation. Presenters who listed themselves as independent scholars or who did not provide an affiliation were each counted as a separate institution in this data, as they each represent a unique point of view.

We also coded the institutional affiliation with each presentation as "local" or not, and if there was a non-academic institution present. We defined "local" as approximately a one-hour drive from the conference location, not accounting for traffic, and used Google Maps to estimate this time and distance. We selected this driving time as a way to have a standard but recognized that this plays very differently in different parts of the U.S., where there may be more traffic (e.g., San Diego, California), or people are used to driving longer distances (e.g., Iowa City, Iowa).

Anyone with a college or university affiliation was designated as "academic" in our coding. This held regardless of what type of academic institution, from a community

24. We chose five as the number in question because it was large enough that it would not just gather data such as two people from an institution presenting together or the same person presenting two or three times at a conference.

college to members of the Association of Research Libraries (ARL), what department the presenter worked in on campus (something that was not consistently reported), or what their role was at the institution, if reported. Institutional members of ARL or the Independent Research Libraries Association (IRLA) such as the New York Public Library or the Library Company of Philadelphia were also coded as academic. Non-academic affiliations included cases when no affiliation was given, independent researchers, vendors (such as Atlas Systems or booksellers), digital libraries, historical societies, public libraries, and museums. While many public libraries or museums might be considered academic research libraries, we did not want to impose value judgments about which public libraries or museums "count" as research institutions beyond those belonging to the networks mentioned above.

TABLE 1
Conference Locations, Titles, and Number of Sessions

Year	Location	Conference Title	Number of Sessions
2009	Charlottesville, VA	"Seas of Change: Navigating the Cultural and Institutional Contexts of Special Collections"	24
2010	Philadelphia, PA	"Join or Die: Collaboration in Special Collections"	24
2011	Baton Rouge, LA	"In the Hurricane's Eye: Challenges of Collecting in the 21st Century"	23
2012	San Diego, CA	"FUTURES!"	24
2013	Minneapolis, MN	"O Rare! Performance in Special Collections"	40
2014	Las Vegas, NV	"Retrofit: Exploring Space, Place, and the Artifact in Special Collections"	34
2015	Oakland, CA	"Preserve the Humanities! Special Collections as Liberal Arts Laboratory"	32
2016	Coral Gables, FL	"Opening Doors to Collaboration, Outreach and Diversity"	30
2017	Iowa City, IA	"The Stories We Tell"	29
2018	New Orleans, LA	"Convergence"	38
2019	Baltimore, MD	"Response & Responsibility: Special Collections and Climate Change"	36
2021	Virtual*	"Power. Resistance. Leadership"	27

*The 2021 conference was, in part, based on the originally scheduled 2020 conference, which was to be held in Bloomington, Indiana, but which was canceled due to the COVID-19 pandemic. Some sessions were the same, while others were newly added; presenters of sessions accepted for 2020 were given the opportunity to present in 2021.

TABLE 2
Types of Sessions

Year	Plenary	Seminars	Short papers	Discussion groups	Poster sessions	Unconference	Case studies	Participant-driven	Other
2009	5	9	3	5	0	0	0	0	2
2010	3	12	0	5	0	0	4	0	0
2011	4	8	2	5	0	0	4	0	0
2012	3	10	4	7	0	0	0	0	0
2013	3	9	10	9	2	7	0	0	0
2014	3	9	10	9	2	0	0	0	1
2015	3	13	10	0	1	0	0	5	0
2016	3	11	6	0	2	0	0	8	0
2017	3	10	7	6	1	0	0	0	2
2018	3	9	15	0	3	0	0	8	0
2019	3	9	12	0	3	0	0	6	3
2021	2	7	7	0	1	0	0	4	6

During the coding process, each of the authors coded the dataset on their own. We then compared these coding decisions, discussed any discrepancies, and decided about how we would code a specific field. All data presented here is a result of this reconciliation process.

Results and Analysis

Overall Conference Data

It is important to first document the locations and themes of the conferences in this dataset, as this influenced what is "local" and what were the content and topics with which the conference engaged (see table 1).

We counted the number of sessions in order to look at whether the conference was growing. The number of sessions has increased somewhat, even as the general length of the conference has remained the same (2.5 days). An increase in the number of sessions should offer more slots for speakers and professional development options for special collections librarians.

Session Breakdown by Type

There are several types of sessions that have consistently been part of the conference over the years (see table 2). These include plenaries, seminars, some kind of short papers/panels (in various forms), and sessions with some kind of participatory component, such as discussion groups and participant-driven sessions. In general, these types of sessions correspond fairly well with the common types of sessions described in the conference manual.[25] There are also types of sessions that have been added more recently and then continued over many years, such as poster sessions.

RBMS has also experimented with certain types of sessions that did not ultimately remain part of regularly planned conference offerings. For instance, there were seven unconference sessions in 2013, but none in subsequent years. An unconference is when there is no set agenda for the conference/session, and it is set by those attending. In recent years, there have been pop-up sessions as well as "people's choice" sessions, which had a later proposal due date. These sessions are sometimes designed to address more "timely topics," and thus may provide an opportunity similar to the unconference to address pressing issues of importance to the RBMS community.

Planning a variety of sessions offers more RBMS attendees the chance to participate as speakers, given that different session types require different time commitments. Poster sessions allow for the presentation of work that may not rise to the level of a paper, or recent work where the presenter may not have had time to develop a full paper. Because of the number of posters which can be presented in one session, poster sessions also increase the number of people who can present in some form at RBMS. Seminars, with their required educational outcomes,[26] may also provide opportunities for presenters to speak about the work they have been doing beyond research projects. More participatory sessions, such as discussion groups and participant-driven sessions, provide opportunities for people from institutions of any size to articulate their views even if they are not formal presenters at the conference. The terminology used for these participatory sessions has changed over the years, but there are either discussion groups or participant-driven sessions at each of the conferences in our dataset, although they never both occur at a conference.

Presentation Topics

There are no obvious trends in this section of the data beyond showcasing the wide-ranging topics covered at the RBMS conference (see table 3). Most topics fluctuate up and down over the years, but there are no consistent upward or downward trends to reflect the changing state of the field. There is more balance in the presentation topics than we initially supposed, as comments about the RBMS conference experience often indicate that there is "no programming on 'x'" or "there always used to be 'y,' but now no one presents on it." These data show that sessions have been fairly well distributed across the topics we identified in recent years.

25. RBMS Conference Planning Manual.
26. "Proposing, Organizing, and Selecting RBMS Conference Seminars: Procedures and Guidelines," revised January 2008, https://rbms.info/committees/seminars/procedures/.

TABLE 3
Presentations by Topic

Year	Tech Services	Public Services	Curation And Collection Development	Management & Admin	Book History/ Bibliography	Conservation & Preservation	Digital Scholarship & Digitization	Bookselling	Instruction	Security	Archives	Self-Reflection	Other
2009	4	6	2	1	1	3	2	1	0	0	0	6	8
2010	2	9	0	2	2	0	3	0	3	0	3	4	4
2011	2	2	7	2	1	2	3	0	1	1	0	7	5
2012	5	2	1	0	3	1	2	1	2	1	2	3	7
2013	5	8	2	0	6	1	5	1	4	0	6	0	17
2014	5	5	3	0	7	2	4	0	4	0	4	4	24
2015	4	8	2	1	0	0	9	1	11	0	1	7	15
2016	5	11	3	2	4	1	2	1	4	1	8	5	17
2017	9	11	3	2	3	0	1	0	5	1	1	5	9
2018	6	4	6	1	0	3	4	0	4	1	3	11	16
2019	0	9	3	2	0	7	3	1	4	1	7	6	23
2021	6	10	3	1	2	1	0	0	5	0	2	4	8

Over the entirety of the dataset, there are more public services presentations than those on technical services or curation and collection development, which is interesting since special collections directors are currently more likely to come from a background in curation or technical services.[27] It is possible that this may be related to the perception that it is easier for public services workers to present rather than to write an article, although we might also speculate that attending a conference is hard for public services staff, since they need people to remain behind to keep front line access points operating. It may also be the case that people working in technical services or curatorship who are interested in leadership positions focus on writing articles rather than presenting, as these publications are often given more weight than conference presentations in pro-

27. Sarah M. Horowitz and Colleen W. Barrett, "So You Want to Be a Leader? Examining Pathways to Special Collections Administration," *College & Research Libraries*, 84, no. 5 (Sept. 2023), https://crl.acrl.org/index.php/crl/article/view/26025/33939.

motional contexts. It is also interesting to note that—except for 2009, when there were none—there are presentations on instruction throughout our dataset. Since instruction is still a relatively new aspect of the special collections field, we might have expected to see a continual increase in this number. However, the number is relatively steady, except for a spike in 2015, when the conference theme centered special collections as liberal arts laboratory, a topic which lends itself particularly well to instruction.

The numbers for presentations on archives, book history, and bibliography are also relatively steady over the years. However, there are more presentations on archives than on book history and bibliography in the overall dataset (thirty-seven versus twenty-nine), which is interesting given that RBMS as a section is defined by its inclusion of rare books *and* manuscripts (as opposed to SAA, which only includes archives). While Griffin notes that security-related topics frequently appear in *RBM*,[28] this is not the case in our dataset, where there is, at most, one presentation related to security each year.

It is unsurprising that some themes only occur in relatively small numbers due to other opportunities for engagement beyond the RBMS conference. There are few presentations coded as management and administration; this may be due to the fact that there are resources for learning about management and administration in larger library arenas (such as ACRL or ALA), or in non-library settings, while many of the other topics listed are only available at specialized conferences like RBMS. Although conservators have their own conference, sponsored by the American Institute for Conservation (AIC), there are some conservation and preservation presentations during most of the years represented in our dataset. The Digital Library Federation (DLF) annual forum provides a venue for such programming, but the number of presentations on digitization and digital scholarship at RBMS has also remained fairly steady, with a small increase in 2015. Again, this may be related to the fact that the theme that year revolved around special collections as a laboratory for the humanities, in which digital scholarship holds a large role. The steadiness of this interest, however, also shows that RBMS has consistently been considering digital work and digital materials over the course of the studied period. Bookselling presentations may be low throughout our dataset because the main audience for this conference is library workers rather than booksellers (although many booksellers attend and exhibit at the ABAA booksellers' showcase hosted at the conference). Presenting may be viewed as an additional task and cost for booksellers that may not pay off in the same way that it would for a librarian or archivist.

Self-reflection was also a consistent topic across the conferences, except in 2013 when no presentations were coded as such. As noted above, RBMS is a relatively

28. Griffin, 76.

TABLE 4
Diversity-Focused Presentations

Year	# Of Presentations	% Of Presentations
2009	1	3
2010	2	6
2011	2	5
2012	1	3
2013	2	4
2014	2	3
2015	3	5
2016	11	17
2017	6	12
2018	11	19
2019	10	15
2021	14	33

self-reflective organization, and continued interest in the history and future of special collections librarianship is borne out in the presentations coded here. When the conference theme was related to a very specific topic, such as climate change, the number of "other" designations was likely to be high, indicating a number of presentations specifically related to that theme, rather than to any of our coding categories.

Presentations with a Diversity Focus

BIPOC library workers and people of diverse backgrounds and experiences speak on many topics, not just diversity issues, so the number of presentations with diverse content is in no way a representation of the diversity of the speakers at the RBMS conference (see table 4).

RBMS created a diversity action plan in 2003 and has had a Diversity Committee since 2005.[29] In the last few years,[30] the Diversity Committee has been involved in the review and evaluation of conference proposals, but that had not consistently been the case in prior years. The Diversity Action Plan mentions the possibility of conference programs as one way to promote diversity as a value to RBMS members and to encourage the collecting of diverse materials.[31]

29. "RBMS Diversity Action Plan," adopted May 23, 2003, https://rbms.info/diversity/rbms_diversity_action_plan/; "Diversity Committee," RBMS Manual, revised June 2002, https://rbms.info/rbms_manual/standing_committees/#diversity.
30. For the 2020/2021 conference.
31. RBMS Diversity Action Plan.

The expansion of the number of sessions offered at the conference beginning in 2013 did not lead to more presentations focused on diversity. While the numbers fluctuate slightly, before 2016, presentations that had a diverse element were 6 percent or less of the total number of presentations. There is an increase in the percentage of presentations that have a diverse topic starting in 2016, although they remain in the teens. While this change began soon after RBMS became a conference rather than a preconference, there is no reason to suppose any particular connection between the two. However, given that one-third of the 2016 conference theme was Diversity (the conference title was "Opening Doors to Collaboration, Outreach and Diversity"), one might have expected even more presentations with diversity as a component. It is only in 2021, when the conference theme was "Power. Resistance. Leadership." that 33 percent of the presentations had a diverse component. We cannot directly connect the 2021 increase in presentations with a diversity focus to the Black Lives Matter protests of 2020, or the virtual format of the conference, as many of the conference presentations were originally accepted for the canceled June 2020 conference and were submitted before the outset of the COVID-19 pandemic.

Number of Individual Institutions Represented

The number of individual institutions represented and how many appear on a program multiple times has larger implications for special collections librarianship in the United States (see table 5). Presenting at RBMS often confers a sense of endorsement

TABLE 5
Individual Institution Representation

Year	# Of Presenters	# Of Individual Institutions Represented	# Of The Same Institution Listed More Than Once But Fewer Than Five Times	# Of The Same Institution Listed More Than Five Times
2009	66	52	8	0
2010	79	55	17	0
2011	79	61	14	0
2012	82	51	13	2
2013	135	72	26	4
2014	111	66	20	3
2015	146	85	22	4
2016	120	77	21	2
2017	114	69	26	1
2018	158	96	33	2
2019	163	104	32	3
2021	177	101	29	5

and prestige. Institutions represented on the program more than once have an outsize influence on what kinds of projects and programs are seen as shareable, groundbreaking, or important in the field.

As the number of presentation slots held at RBMS increases, so too does the number of institutions represented. Throughout the conferences studied, the number of institutions represented more than once but fewer than five times varies but remains generally between 23 and 38 percent, with an outlier of 15 percent in 2009 (the fiftieth anniversary conference). The number of institutions represented more than five times remains relatively small, never reaching more than 6 percent of individual institutions represented across the years. At all the conferences studied, over half the speakers came from institutions who were not otherwise represented on the program, ensuring a diversity of perspectives.

There are several possible explanations for the repetition of institutions. It is not uncommon for people to copresent at RBMS, so it is possible that multiple people from the same institution are speaking on a single panel, perhaps about different aspects of a project. Of course, this requires that the institution be willing and able to pay for more than one person to attend RBMS, or for the individuals to cover the cost themselves. In some years, this number also indicated the same person speaking more than once; given that we did not include names in our dataset, we could not account for these instances specifically. In the past few years,[32] RBMS has adopted a rule that someone may speak at the conference only once, in an effort to make room in the program for new and different voices. Further discussion of how institutions are represented at the conference may also be helpful in considering this goal, given that between a quarter and a third of presentations are from institutions that are represented more than once on the program.

Many of the institutions which are represented multiple times at the conference are large research libraries, several of them ARL institutions. This is unsurprising, as large institutions have more staff to send and (often but not always) more money to send them. This is problematic for many smaller institutions, which do not have the same staffing levels or resources as larger institutions, and which may be left behind in the crafting of best practices or trends that are not scalable or sustainable and that may be dependent on specialized systems or large amounts of staff time.

Local Institutions Represented

Presentations by local library workers allow some who might not otherwise be able to engage with RBMS to highlight their work (see table 6). Participation of local institu-

32. Formally introduced in the call for proposals in 2019 for the 2020 conference.

TABLE 6 **Local Institution Representation**		
Year	**#**	**%**
2009	5	15
2010	6	19
2011	4	12
2012	5	17
2013	3	5
2014	1	2
2015	11	19
2016	5	8
2017	4	8
2018	7	12
2019	10	15
2021	N/A	N/A

tions is important because library workers at smaller or less-resourced workplaces may not have the ability to fly to a conference, and may only be able to participate when it is within driving distance or online. Some conference locations have many institutions in the nearby area, while others have far fewer.

The table above shows the number of presentations by local participants.[33] The number of local presenters was quite small at all of the conferences studied, but the data do suggest that the East and West coasts produce more local presenters than those in the Midwest. This may be related to the fact that East and West coast institutions often exist in clusters around densely populated areas, while Midwestern cities and institutions are often quite spread out; library workers may thus be willing to drive further to present at a conference than is represented in the distance we chose as "local."

Non-Academic or Research Institutions Represented

Although RBMS exists within an association designed to support specifically college and research libraries (ACRL), bringing in different institutional viewpoints to professional development can only benefit the profession (see table 7). While much

33. This is not a full representation of how much local representation is present at RBMS conference, as there are likely local attendees who are not presenters and the dataset did not include events such as tours, in which local library workers are more likely to be involved. Local library workers may also be involved in the Local Arrangements Committee, which works with the Conference Program Planning Committee on local site issues, planning tours, and organizing social events such as dinner meet-ups or recommending local restaurants. Being deeply involved in planning local arrangements may mean that library workers do not have time to present at the conference.

TABLE 7
Non-Academic Institution Representation

Year	# Of Presentations with a Presenter Who Is from a Non-Academic Institution	%
2009	10	29
2010	14	44
2011	9	27
2012	12	40
2013	13	24
2014	15	24
2015	12	20
2016	17	27
2017	8	16
2018	15	25
2019	24	36
2021	18	43

of what is often considered the "rare books and manuscripts profession" is from an ARL perspective, there are important voices in smaller academic institutions, non-ARL libraries, HBCUs, and those beyond the academy.[34] We were especially interested in knowing how often views from outside "traditional" academic institutions were included in the RBMS conference. Museum workers, historical society workers, booksellers, technology vendors, and independent scholars have some representation as presenters at each conference. Bookseller involvement in the conference is relatively recent.[35] The general number of presentations by those from outside academia has varied over time, with anywhere from 16 to 44 percent of presentations being by those outside the "traditional" academy. We might speculate that having the conference online enlarged the pool of possible presenters, but since some of these sessions were carryovers from the canceled 2020 conference, we cannot say for sure.

Conclusion and Ways Forward

We are in a period of change for the RBMS conference. After two virtual conferences due to the COVID-19 pandemic, RBMS held its first hybrid conference in summer 2023. As fewer RBMS committees meet in-person at the ALA annual conference,

34. For examples of why it is important to look beyond the ARL experience, see Melanie Griffin, "The Rare Book Librarian's Day, Revisited," in *New Directions for Special Collections: An Anthology of Practice*, eds. Lynne M. Thomas and Beth M. Whittaker (Santa Barbara, CA: Libraries Unlimited, 2017); Thomas; and Horowitz & Barrett.

35. Brim and Jackson, 17.

there is less reason to couple the RBMS conference in time and space with it.[36] The Climate Readiness Task Force has also recommended that RBMS consider climate costs when planning conferences and alternate in-person and virtual conferences on a regular basis.[37] Concerns about affordability of conferences are also driving conversations about whether to incorporate virtual or hybrid conferences into the planning process. Other similar groups are also exploring these possibilities.[38] As the RBMS conference incorporates more virtual components, it may also benefit from greater engagement with the local community and local library workers when the conference has a physical location.

This article, then, is an examination of the RBMS conference in a time before an era of disruptive change. There are many possibilities for future research, including how virtual conferences affect the types of institutions presenting at RBMS, and whether there continues to be discussion of diverse topics. It will also be interesting to see whether there are changes in the topics discussed at the conference, given that discussions about work in general have been realigned by the pandemic. Further research might break down more individually the types of institutions represented at the RBMS conference (for instance, Oberlin Group libraries, HBCUs, public versus private institutions) to see how different types of institutions are represented—and change—over time, as we move into this new era. Additionally, the institution type and geographic makeup of the Conference Program Planning Committee could be studied. Future discussions of the conference might also reach out to presenters more directly to see how many people are first-time presenters, how often people have presented at past conferences, and the impact of geographical considerations on their interest in presenting, which was out of scope for this study.

We hope that this study has given members of RBMS an opportunity to critically review the RBMS conference and think about ways forward in our changing world.

36. The RBMS Task Force on RBMS Meetings and Conferences made recommendations about when, where, and how RBMS should conduct business meetings going forward in summer 2023.

37. "Final Report of the RBMS Climate Readiness Task Force" June 3, 2022, https://docs.google.com/document/d/1GIeo7BWQ-6X_jHIQwU65VElskXZ9Uqj5lkTqR49gF6Q/edit#.

38. See, e.g., Matthew Kirschenbaum, reply to "Virtual vs in person meetings," Society for the History of Authorship, Reading & Publishing, August 7, 2022, https://list.indiana.edu/sympa/arc/sharp-l/2022-08/msg00021.html.

Clare Withers, Carrie Donovan, Diana Dill, Jeanann Haas, and Berenika Webster

Advancements in Primary Source Pedagogy: Catalysts for Collaboration, Context, and Change

This paper describes how librarians and archivists at the University of Pittsburgh (Pitt, the University) reenvisioned their teaching with primary sources by applying findings from the 2021 Ithaka S+R study, "Teaching with Primary Sources: Looking at the Support Needs of Instructors," to inform and enhance instructional initiatives. Considering Pitt's library renovation (2017–24), the emergence of digital pedagogy at the University in the wake of COVID-19 health- and safety-related measures, and the call for dialogue around social justice issues, the Ithaka study provided grounding evidence. Inspired by these catalysts, librarians and archivists overhauled their teaching with primary sources through strategic collaborations that prioritized inquiry-based learning for students.

Introduction

The University of Pittsburgh Library System (ULS) aligns instructional efforts with the University's strategic goal of "Preparing students to lead lives of impact through a supportive environment focused on a holistic and individualized approach to learning inside and outside the classroom," as stated in the internally distributed document *The Plan for Pitt.*[1] This document outlined a strategic plan for the University, identifying opportunities for improvement and strengthening academics, research and scholarship, and community service. The strategies intended to bring about this goal included enhancing the curriculum through innovation and technology, focusing on personalized learning, and enriching student experience by expanding opportunities for engagement with diverse cultures and perspectives. Through instruction with primary sources, librarians and archivists at Pitt connected distinctive collections to student learning within the context of specific courses and through broader outreach programs to the University community and beyond.

1. University of Pittsburgh, *Plan for Pitt: Making a Difference Together Academic Years 2016–2020*. Pittsburgh: The University, 2016, https://www.planforpitt.pitt.edu/sites/default/files/strategic-plan-presentation.pdf.

With the advancement of local pedagogical practice and experience, librarians and archivists at Pitt are developing more collaborations with instructors of record for undergraduate courses (referred to herein as "instructors"). These collaborations allow for the co-creation of course assignments and assessments using primary sources to influence discovery and discourse. To inform these practices—and to capitalize on a newly renovated, technology-infused library instructional space at Pitt—the ULS participated in a research project sponsored by the nonprofit association Ithaka S+R (the Ithaka study).[2] Twenty-six university library teams in the United States and United Kingdom, plus one ProQuest team, joined this cross-institutional study to evaluate undergraduate teaching with primary sources. In 2019, researchers from each project team participated in training sessions before coordinating semi-structured interviews with approximately 335 instructors across all institutions and analyzing data for a local report in order to contribute to a culminating analysis compiled by Ithaka in 2021.

Ithaka study findings regarding the experiences of instructors who incorporated primary source materials into their courses, and the challenges students faced when engaging with these sources, created opportunities for dialogue and collaboration with instructors. This paper provides examples of partnerships with instructors at Pitt that illustrate the use of distinctive collections to elevate student learning through deep analysis and critical inquiry. The findings from Pitt's participation in this research study—combined with the COVID-19 pandemic, the addition of a library classroom specifically designed for teaching with primary sources, and the call for dialogue and action in response to institutionalized and systemic racism in the United States—created opportunities for communication, collaboration, and change locally that, ideally, will inform teaching with primary sources at other institutions.

Literature Review

The concept of information literacy emerged in librarianship in the 1970s and centered on empowering people to use information for problem-solving and decision-making.[3] While the history of information literacy and the role of academic librarians in facilitating teaching and learning has been represented in the literature for more

2. As part of the study, participating teams contributed "local reports" delineating their particular findings. These are linked on Ithaka S+R's research report. See https://doi.org/10.18665/sr.314912. The authors acknowledge the 2021 assessment in this journal by Melissa Grafe that was also influenced by the Ithaka study, which centers interviews and the effectiveness of teaching with physical materials. Melissa Grafe, "Treating the Digital Disease: The Role of Digital and Physical Primary Sources in Undergraduate Teaching," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 22, no. 1 (2021): 25–32. https://doi.org/10.5860/rbm.22.1.25.

3. Shirley J. Behrens, "A Conceptual Analysis and Historical Overview of Information Literacy," *College and Research Libraries* 55, no. 4 (1994): 309–22. https://doi.org/10.5860/crl_55_04_309.

than fifty years,[4] similar discussions in the archives and special collections communities have been more common since the start of the twenty-first century. Daniels and Yakel point to two drivers behind the increased attention to instruction with primary sources.[5] One was the recognition of the need for research-based university education in the 1990s, in order to advance curriculum beyond fact-based memorization and move toward process-oriented inquiry.[6] In particular, the 1998 *Boyer Commission Report on Reinventing Undergraduate Education* recommended the incorporation of research opportunities at the undergraduate level as a critical component of university education, stating that "Undergraduates beginning in the freshman year can learn through research.... In the humanities undergraduates should have the opportunity to work in primary materials, perhaps linked to their professors' research projects."[7]

Scholarship over the past ten years reflects the emerging importance of primary source engagement for students in uncovering context and fostering the ability to identify and articulate meaning. The findings expressed in Carini acknowledged that engaging with primary sources contributes to the development of critical thinking skills and experiential learning.[8] Additionally, primary sources are used to teach students the process of inquiry, creating a narrative, and producing original research, which contributes to the overall growth of students as knowledge producers.[9] This enhanced experience for student learners is influenced by librarians and archivists shifting away from a demonstration-based teaching model to one that is grounded in learning theory. The work of educational theorists Jean Piaget and Lev Vygotsky, who laid the framework for Constructivism, a process-based framework that situates learning in a social context and with supportive structures known as scaffolding, is particularly relevant for primary source literacy.[10] Vong advocated for an evolving instructional role for librarians and archivists so that they could guide students in inquiry-based discussion with primary sources instead of presenting facts and information about collections.[11] Through enhanced pedagogy, librarians and archivists offer meaningful contributions to learning and capitalize on student enthusiasm for the uniqueness

4. Hannelore B. Rader, "Information Literacy 1973–2002: A Selected Literature Review," *Library Trends* 51, no. 2 (2002): 242–59.
5. Morgan Daniels and Elizabeth Yakel, "Uncovering Impact: The Influence of Archives on Student Learning," *The Journal of Academic Librarianship* 39, no. 5 (2013): 414. https://doi.org/10.1016/j.acalib.2013.03.017.
6. Daniels and Yakel, "Uncovering Impact," 415–16.
7. Carnegie Foundation for the Advancement of Teaching, "Reinventing Undergraduate Education: A Blueprint for America's Research Universities," *Boyer Commission on Educating Undergraduates in the Research University* (1998): 17. https://eric.ed.gov/?id=ED424840.
8. Peter Carini, "Information Literacy for Archives and Special Collections: Defining Outcomes," *Portal: Libraries and the Academy* 16, no. 1 (2016): 193–95. https://doi.org/10.1353/pla.2016.0006.
9. Carini, "Information Literacy for Archives and Special Collections," 193–95.
10. Silvia Vong, "A Constructivist Approach for Introducing Undergraduate Students to Special Collections and Archival Research," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 17, no. 2 (2017): 149–152. https://doi.org/10.5860/rbm.17.2.9666.
11. Vong, "A Constructivist Approach," 149.

and materiality of objects through their subject and collection expertise.[12] Furthermore, professional frameworks such as the *Guidelines for Primary Source Literacy,* developed by the SAA-ACRL/RBMS Joint Task Force, provide a foundational tool for moving beyond the show-and-tell model to guide the design, implementation, and assessment of instructional programs, and create "active, hands-on, collaborative learning."[13]

The second driver for increased interest in teaching with primary sources was a desire to illuminate the impact of engagement with primary sources for students through learning assessments. Carter eloquently identified "impact in the classroom" as an achievable and measurable goal.[14] She wrote about the important role of instructional partnerships between instructors and librarians/archivists to advance teaching and support learning through special collections. Furthermore, Carter acknowledged the key role in assessing this work: "We need to know and be able to demonstrate how well we are helping students to become better scholars, connect with creativity, and develop lifelong learning habits."[15] More recently, OCLC's[16] *Research and Learning Agenda for Archives, Special, and Distinctive Collections* report identified teaching with primary sources as "an opportunity for special collections to play an important role in the library's programmatic vision for teaching and learning."[17]

Another area of focus emerging within the literature is centered on students' adoption of evidentiary inquiry skills, moving them beyond their own opinions and beliefs toward new ways of thinking about complex issues. Scholarship in this area, particularly from the past five years, reveals that the process of uncovering the complexities inherent in primary sources performs a critical role in student learning. For example, crucial conversations around materials that contain evidence of racism, discrimination, and marginalization stimulate discussion and encourage student reflection, thereby rendering the narratives "more vivid and personal," and allowing the deep thought required to develop awareness and empathy.[18] At the same time,

12. Matthew Strandmark, "The Undergraduate Feedback Loop: Summarizing, Analyzing, and Acting on Qualitative Student Feedback in Special Collections and Archives Education Programs," *Archival Issues* 39, no. 2 (April 2019): 7–21. https://doi.org/10.31274/archivalissues.11072.

13. Theresa Quill, Maureen E. Maryanski, Meg Meiman, Isabel Planton, Meggan Press, and Carrie Schwier, "Working across Borders: Building Collaborations for Primary Source Instruction," *Journal of Map and Geography Libraries* 15, no. 2–3 (2019): 153. https://doi.org/10.1080/15420353.2020.1719268.

14. Lisa R. Carter, "Articulating Value: Building a Culture of Assessment in Special Collections," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 13, no. 2 (2012): 97. https://doi.org/10.5860/rbm.13.2.376.

15. Carter, "Articulating Value," 97.

16. Formerly known as the Online Computer Library Center.

17. Chela Scott Weber, "Research and Learning Agenda for Archives, Special, and Distinctive Collections and Research Libraries," *OCLC Research* (2017): 10. https://doi.org/10.25333/c3c34f.

18. Jeanne Abrams, "Primary Sources in the College Classroom: The Beck Archives at the University of Denver Libraries," *Judaica Librarianship* 21 (July 2020): 54. https://ajlpublishing.org/index.php/jl/article/view/535.

the discomfort, frustration, and anxiety that students experience in handling primary sources further illustrates the "complications and implications of working with [them]."[19] While primary source materials in any format are influential for student learning, it should be noted that access to physical materials during times of campus closure (as when institutions closed during the global health emergency) highlighted primary source materials' unique role in student engagement. Colleagues from Yale University, another participating institution in the Ithaka study, noted the key role of materiality in the value instructors placed on primary source engagement for their students,[20] especially in a landscape in which the experience of teaching and learning was increasingly digital.

The literature reflects the landscape of career preparation for information professionals in that it points to few opportunities for formalized pedagogical training in graduate library and information science programs. Like colleagues working in other areas of librarianship, "many who end up teaching in special collections and archives may have no formal education on how to teach and assess their efforts."[21] Despite this apparent void in formal teacher training for librarians and archivists, there is an increasing need for library professionals to learn about primary source pedagogy. Anderberg et al. surveyed archival training programs in the United States and Canada and identified little pedagogical training, with most experience gained outside of coursework.[22] To address the gap, archivists and librarians share best practices through symposia and conferences.[23] Quill et al. described how these opportunities to participate in focused workshops, training, and other programs gave rise to the co-creation of innovative pedagogical practices around primary sources. These learning initiatives facilitated collaborations among librarians and archivists across distinctive collection repositories, encouraged interdisciplinary approaches to curation, and fostered co-teaching to keep pace with increasing requests for primary source engagement.[24]

In conclusion, these developments shined a spotlight on the need for the Ithaka study on teaching with primary sources. While there was abundant reflection on the perceived value of learning through primary sources from the perspective of archivists and librarians, there was little from the instructors' viewpoint, as previously defined.

19. Kara Flynn, "Scaffolding Primary Source Research and Analysis in an Undergraduate History Research Methods Course: Case #12," *Case Studies on Teaching with Primary Sources* (2020): 6. https://www2.archivists.org/sites/all/files/TWPSCase_12_Scaffolding_Primary_Source_Research_0.pdf.

20. Grafe, "Treating the Digital Disease," 28–29.

21. Anne Bahde, Heather Smedberg, and Mattie Taormina, *Using Primary Sources: Hands-On Instructional Exercises* (Libraries Unlimited, 2014): xiii.

22. Lindsay Anderberg, Robin M Katz, Shaun Hayes, Alison Stankrauff, Morgen MacIntosh Hodgetts, Josué Hurtado, Abigail Nye, and Ashley Todd-Diaz, "Teaching the Teacher: Primary Source Instruction in American and Canadian Archives Graduate Programs," *The American Archivist* 81, no. 1 (2018): 188–215. https://doi.org/10.17723/0360-9081-81.1.188.

23. Strandmark, "The Undergraduate Feedback Loop," 10.

24. Quill et al., "Working across Borders," 158–65.

Without evidence of deeper interactions between instructors and librarians/archivists, the library and archival literature is missing instructors' perspectives, concerns, and processes, which are helpful in establishing and sustaining educational partnerships. The results from the Ithaka study and subsequent publications address this gap in the literature, as they illuminate instructors' intended purpose in teaching with primary sources, and their individual experiences that influence the integration of primary sources into courses and curricula.

Methods and Findings

Using an interview protocol designed by Ithaka (see appendix), the ULS project team interviewed thirteen instructors in humanities and social sciences disciplines who recently taught undergraduate classes using primary source materials at Pitt. Providing the structure for conversations with instructors, Ithaka's interview questions were pointed enough to gather analyzable data across different perspectives and also allow for the necessary flexibility to explore specific concepts or topics of interest that arose during the conversations. Through the subsequent coding and analysis of data, four major themes emerged:

- Learning to teach with primary sources is largely informal: The ways in which instructors integrate primary sources into teaching are influenced more by their own experiences, research processes, and practical experience than any pedagogical training. Instructors rely on mentors and their own formative educational experiences to shape how they design and deliver their respective students' learning opportunities.
- Curation of both physical and digital materials is challenging: Selecting primary source content to fulfill instructional purposes or facilitate learning outcomes is time-consuming. Instructors cited increasingly larger class enrollments, varying levels of students' research skills, and the evolving availability of materials in physical and digital formats as particular challenges. Many instructors were concerned that digitized content would be understood by students as more significant and preferred merely because of accessibility and convenience.
- Tension between facilitated discovery versus self-motivated discovery: Instructors are ambivalent about covering more resources versus taking time to provide an in-depth look at one or two items. The survey uncovered a paradox in which instructors' commitment to careful selection and arrangement of primary sources for their students' use can inadvertently limit students' learning. Without experiencing the process of discovery, access, selection, and the opportunity to practice interpretation of sources on their own, students do not develop skills that they can transfer to other research projects.
- Primary source learning fosters the development of analytical skills: Engaging with primary sources is integral to development of critical thinking for students.

> Critical thinking ensures students' success within disciplinary contexts and is transferable to other areas. Instructors specifically cited students' ability to ask well-informed questions—and to think beyond their own experiences and embrace new perspectives—as integral for academic success in any discipline.

Findings from the interviews conducted at Pitt provided details about how instructors internalize and teach the research process with primary sources. The memory of their own learning at critical educational junctures served as a model for instructors' approaches to teaching with primary sources. As a result, creating opportunities for students to encounter new or challenging concepts through serendipitous—but structured—discovery of primary sources featured strongly in instructors' pedagogical strategies. Overall, instructors prioritized students' engagement with primary sources because of the transformative educational experiences involving student encounters with different perspectives these sources provided, despite the time spent curating primary sources for instruction and the challenges involved with accessing sources across physical and digital formats. The greatest takeaway from these findings was the potential for librarians/archivists to collaborate with instructors to design and deliver in-depth, inquiry-based learning experiences.

Based on the insights gained from gathering data about instructors' priorities, concerns, and challenges when teaching with primary sources, instructional consultations and collaborations focused on primary sources at the ULS now have the potential to be more evidence-based. To further influence primary source pedagogy through this evidence, the members of the ULS project team who collaborated on the Ithaka study conducted meetings with internal and external library stakeholders to share the findings and discuss next steps. The need for a community of practice around primary source pedagogy emerged, as did a call for training programs on how to incorporate primary sources into teaching. This not only closed the loop on the study but also situated the findings as generally applicable to other partnerships and projects involving librarians and instructors across disciplines.

Technology-Enhanced Teaching at Pitt Post-Ithaka Study

Just as instructors find teaching with primary sources to be an iterative process, librarians and archivists who teach with primary sources are in a continual state of learning about best practices in developing instructional initiatives and identities. To that end, at Pitt a follow-up survey was sent to sixty instructors who had previously brought classes to the library for instruction with primary sources in 2018, 2019, or 2020. Twenty-seven completed surveys were received. Within the time frame of the University's COVID-19 health- and safety-related measures (COVID-19 policies), this survey informed the creation of virtual and hybrid programming that best supported instructors' teaching and research.

In terms of responses, the majority (74%) reported that they would be interested in developing assignments using existing digitized primary sources from Pitt's collections and collaborating with librarians and archivists to select and curate sources on a specific course topic. Most (78%) would consider real-time (synchronous) and interactive class sessions with primary sources facilitated by librarians and archivists using Zoom. Many (59%) expressed interest in using short, prerecorded asynchronous videos, and 48% of respondents indicated interest in incorporating student-created output, such as online exhibits using primary sources. As a result, tools to support different modes of instruction and delivery of classes were incorporated into the teaching repertoire during this time, including digital learning objects, asynchronous modules, and digital materials from distinctive collections, as outlined at https://pitt.libguides.com/ascclassvisits.

While access to technologies and digital research materials facilitated teaching and learning in the wake of the COVID-19 pandemic in impressive ways, the lack of physical access to distinctive collections for teaching purposes was challenging. The Ithaka study revealed that when facsimiles or digital surrogates are available, instructors expressed concern that students might misinterpret some digital surrogates as having greater significance over others (when, in fact, they were employed for ease of access). While the standard practice for teaching in hybrid or virtual settings has been to provide links to digital primary sources to students, much of the context from the original materials—arrangement, container, physical features, etc.—could be lost. As one instructor shared from the interviews,

> [T]here's a real push in terms of digitizing, but there's also a real limitation in terms of what gets digitized. And I worry that as we go toward everything digital that we bring with us, all these kinds of assumptions that we can't see, and that will limit then what we imagine worth collecting and telling.[25]

While a class visit might include primary sources accessed via database subscriptions and Pitt's digital holdings, librarians and archivists also used a document camera to incorporate physical collections of material importance in response to instructors' concerns about the use of digital surrogates. These collections included the Elizabeth Nesbitt Collection of historical children's materials, the Nietz Collection of 19th-century schoolbooks, and the Darlington Memorial Library. Both digital and physical formats were considered when librarians and archivists selected materials for classes during fall 2020 and spring 2021.

25. Diana Dill, Carrie Donovan, Jeanann Haas, Berenika Webster, and Clare Withers, "Teaching with Primary Sources at the University of Pittsburgh: Summary Report of Local Findings, August 2020," *Unpublished Project Report*. (Pittsburgh, Pennsylvania: University of Pittsburgh Libraries, 2020): 7. http://d-scholarship.pitt.edu/39698.

One successful hybrid class activity involved in-person students initiating discussion and peer-to-peer learning with their virtual counterparts by showing the primary sources that they were handling via the document camera. Active handling of a text rather than viewing a static digital object helped make the learning experience more engaging. In this example, students observed physical features of the work, including dimensions and materiality—aspects of an artifact that are not often easily understood when studying digital surrogates. Another example included sharing the *Angeli Domini*,[26] a fourteenth-century manuscript leaf featuring an antiphon for the Feast of St. Michael the Archangel, via the document camera to a remote audience on Zoom. Students used the Zoom annotation tool collectively and wrote Latin translations onto a visual overlay of the manuscript. This exercise encouraged students to deliberate and differentiate scripts, expand abbreviations, and identify the writing of different individuals on the manuscript, and to do something otherwise forbidden with special collections materials: make notes over the text. Because access to the original manuscript was not possible due to COVID-19 policies, the annotation tool allowed students to collaborate and discuss their attempts at translation in real-time.

In addition, ULS findings from the interviews conducted as part of the Ithaka study revealed that instructors struggled with whether to cover one or two items in-depth, or to provide a broader overview of multiple items, as evidenced by the following statement from a Pitt instructor:

> Sometimes it's better to sacrifice the breadth so that you can get some depth and slow down a little bit and teach them about a certain way of thinking, a certain approach, and make sure you're getting that point across. I think working with primary sources can teach that lesson, that sometimes quality is more important than quantity in the classroom.[27]

In response to this dilemma, the ULS created brief prerecorded videos of select items, which provided more context and could be used as supplemental instruction, depending on the students' needs and interests. This approach allowed students to perform close reading and develop improved understandings of context around a particular source. As a result, students posed more thoughtful questions and participated in robust class discussion.

Classroom Innovations

During fall 2020 and spring 2021, two members of the ULS project team worked closely with an instructor from a History of the Politics of the English Language

26. "Angeli Domini, 14th Century. Rare Book and Manuscript Leaves Collection," 1400. SC.1970.01, Archives & Special Collections, University of Pittsburgh Library System.
27. Dill et al., "Teaching with Primary Sources at the University of Pittsburgh," 11.

course who previously visited the ULS in-person with classes, and who expressed concern about whether students would fully engage with digital surrogates in a virtual environment. Through instructional consultations, the instructor identified goals for her students regarding thoughtfully considering, identifying, and discussing authorship, audience, critical reception, access and dissemination, and materiality. Based on their shared understanding of learning outcomes, the instructor and librarians co-created virtual learning experiences that showcased special collections materials for the instructor and students, who all participated via Zoom.

This experience allowed students to explore primary sources—created for a target audience of children—by considering the advancement of cultural norms and the significance of language. The lesson began with one librarian briefly introducing an item, *Robinson Crusoe in Words of One Syllable*,[28] on the document camera, and conducting a close reading of a page, with both librarians and the instructor modeling evidentiary inquiry and posing questions aloud. As additional pages were viewed, students engaged as a group by using the chat feature, unmuting their microphones, and speaking to the class to offer observations, pose questions, and comment.

Having provided this basic scaffold, the librarians introduced a PowerPoint that contained thematic slides. Students were given time to select one or two video recordings to review on their own; they listened to the contextual presentation and paused the recording to closely inspect and/or read the text. The students chose to work with content either based on materiality (text, paper, dimensions, binding, and illustrations) or on contemporaneous and historical information (creator, dissemination of the text, audience, and other cultural contexts). Each slide topic included links to videos of document camera handling of curated content, including foundational early literacy; foundations of dominant culture; patriotism and citizenship; and people of color. Each of these brief (three minutes or shorter) recordings featured a librarian handling an item from the collection and narrating broad contextual information such as title, author, date of publication; and some statements about audience and critical reception. The videos were designed to demonstrate the scale and size of an item, and care was taken to highlight materials that were not available as part of an existing digital collection. Students considered the political significance of language in terms of race, gender, class, religion, ableism, patriotism, or some other issue. They analyzed objects individually and considered cultural context and implications, historically and through a modern lens.

Students then joined a Zoom breakout room of their choice—arranged by the preassigned topics—to discuss their independent analysis. Returning from the breakout

28. Mary Godolphin and Daniel Defoe, *Robinson Crusoe in Words of One Syllable*. New York: McLoughlin Brothers, 1869.

rooms, students provided brief overviews of their Zoom room conversations, which culminated in a lively all-class discussion. Some focused on the materiality; others explored creator, dissemination of the text, audience, and other cultural contexts. Many students were astonished by one of the additional works reviewed, the Navajo reader, *The Flag of My Country = Shikéyah Bidah Na'at'a'í.*[29] Students questioned creator intentions and audience agency. The twenty-three-page reader features line drawings and English text with Navajo translation on each page. Students provided evidence of the use of language from the text that many perceived as propaganda and supplied examples to substantiate their arguments about the power of language to promote behavior.

Thoughtful questioning of creator intentions, audience agency, and the promulgation of cultural narratives continued in a discussion of multiple editions of *Robinson Crusoe,* from a 1719 edition[30] to an abridged die cut version for children,[31] to a beginning reader edition[32] and a twentieth-century reimagining.[33] After commenting on the prevalence of the story in Western culture over three centuries, students discussed the abridgement process and issues related to the use of images in works for children. Students considered depictions of scenes of Crusoe discovering a footprint in the sand[34] and standing with his foot on the neck or head of a prostrate Friday.[35] Such engagements with primary sources fostered critical analysis skills that related to considerations of systemic racism and structural oppression.

Cultural Competency with Primary Sources

The Ithaka study revealed that instructors who were interviewed at Pitt valued primary source engagements that moved students from their own opinions to evidentiary inquiry in evaluating past artifacts as a means of exploring current cultural context. This process can be sparked by a juxtaposition from an artifact that prompted curiosity, questions, or concerns. For example, students viewing primary source materials relating to sexuality and gender such as *Transvestia*[36] were often affronted and voiced disbelief about the verbiage used in publications by and for sexually marginalized

29. Cecil S. King, *The Flag of My Country = Shikéyah Bidah Na'at'a'í*, 2nd edition, Lawrence, Kansas: Haskell Institute, 1956.
30. Daniel Defoe, *The Life and Strange Surprizing Adventures of Robinson Crusoe, of York, Mariner: Who Lived Eight and Twenty Years, All Alone in an Un-Inhabited Island on the Coast of America, near the Mouth of the Great River of Oronoque, Having Been Cast on Shore by Shipwreck, Wherein All the Men Perished but Himself, with an Account How He Was at Last as Strangely Deliver'd by Pyrates*, 3rd edition, London [at the ship in Pater-Noster-row]: Printed for W. Taylor, 1719.
31. Lydia L. A. Very and Daniel Defoe, *Robinson Crusoe*. American Poetry, 1609–1900; Segment III, No. 3222 Boston: L. Prang & Company, 1864.
32. Godolphin and Defoe, *Robinson Crusoe in Words of One Syllable*.
33. Michel Tournier, *Friday and Robinson: Life on Speranza Island*, New York: Knopf, 1972.
34. Godolphin and Defoe, *Robinson Crusoe in Words of One Syllable*, Plate 4.
35. Godolphin and Defoe, *Robinson Crusoe in Words of One Syllable*, Plate 5.
36. Virginia Prince, *Transvestia*, Vol. 3. Los Angeles, California: Chevalier Publications, 1962.

populations. In addition, students viewed a girls' etiquette book, *The New Seventeen Book of Etiquette and Young Living,*[37] and noted the edicts on dieting, dating, and reforming of self for male appreciation. With a deep dive into materials from various time periods, students observed how language evolved and changed. While instructors offered insight into vocabulary, students developed critical evaluation skills that enabled their understanding of the artifacts, as well as their recognition of the dominant narratives from the time period and how those can inform sociocultural awareness of present day.

The Pitt Ithaka local report[38] as well as the Ithaka Capstone Report[39] on teaching with primary sources showed that instructors valued the commentary provided by librarians and archivists regarding provenance, background, creators, methods of production, dissemination, and inclusion or exclusion into the institution's special and archival collections. Such practices dovetailed with course readings and lecture content through the curatorial role librarians and archivists fulfilled as they selected materials and design or collaborated on creation of engagement activities to meet instructional outcomes for specific courses. In-class discussion during the sessions in the library might center on complicated topics such as how or why items are selected, gaps and silences in the archive, exploration of which voices are represented or missing, or how materials are described and made accessible.

As a result of the Ithaka study, librarians and archivists at Pitt investigated opportunities to position primary sources in conversations around diversity and inclusion beyond the classroom. For example, a workshop was delivered at the University's 2021 Diversity Forum, "Dismantling Oppressive Systems: Building Just Communities," a four-day online event free and open to the public. The forum issued a call for proposals from all members of the Pitt community and Pittsburgh at large, to design and lead sessions aligned with the forum's topic to dismantle systems of oppression. The library's session explored music, ephemera, manuscripts, and books from social movements of the past and how consideration of such materials fostered understanding and built just communities in and beyond academia.

Participants were invited to interact with primary source materials and consider cultural and historical context from past movements to uncover the complicated processes that resulted in change. Close readings, imagery comparisons, and discussion were used to analyze objects and examine primary source materials in daily life and

37. Enid A. Haupt, *The New Seventeen Book of Etiquette and Young Living*. New York: McKay, 1970: 33–35, 37, 48, 65–67, 94–96.
38. Dill et al., "Teaching with Primary Sources at the University of Pittsburgh," 8.
39. Kurtis Tanaka et al., "Teaching with Primary Sources: Looking at the Support Needs of Instructors," *Ithaka S+R* (March 2021): 1–56. https://doi.org/10.18665/sr.314912.

activism. Informed by the impact of the image in the History of the Politics of the English Language class, librarians and archivists opened the workshop with a depiction from one of the abridgements previously referenced, *Robinson Crusoe in Words of One Syllable*,[40] and alluded to the powerful, ubiquitous images of George Floyd[41] shared throughout social and print media, which continued to spark public debate and to fuel public protests. Next in the workshop, facilitators traced the history of the 1931 Florence Reece song "Which Side Are You On?"[42] from its origin in a coal mining West Virginia kitchen, to workers' rights strikes and contemporary activism at protests. Depictions from ULS collections were mixed with Twitter footage from Black Lives Matter protests[43] in Pittsburgh and beyond.[44] Capitalizing on Ryan Coogler's blockbuster film,[45] the workshop featured Black Panther artifacts including *The Black Panther* newspaper featuring community efforts such as clothing drives,[46] and the earliest introduction of the Marvel superhero Black Panther,[47] and as well as an issue with a anti-KKK plotline;[48] all of this seeded discussion on cultural impact and values. Finally, local activism by the university community was examined, with facilitators sharing the publication *Gay Life,*[49] which featured articles recounting Pitt students' responses to anti-gay activist Anita Bryant in the 1970s.

The library's session was scheduled among fifteen other concurrent sessions and welcomed approximately thirty attendees. The ULS Coordinator for Diversity, Equity, and Inclusion later emailed the presenters to share that, at a Forum wrap-up meeting, the forum's planning committee noted that the ULS presentation was "one of the most informational and excellent presentations of the forum."[50] With the success of this event, the ULS will seek additional opportunities to use primary sources in conversations to deconstruct established narratives and inspire cultural competence and understanding through historical context.

40. Godolphin and Defoe, *Robinson Crusoe in Words of One Syllable*, 1–93.
41. Darnella Frazier, "Video of Derek Chauvin Pressing His Knee on George Floyd's Neck," 10:00, Minneapolis, May 25, 2020.
42. Edith Fowke, Joe Glazer, and Kenneth I. Bray, "Songs of Work and Protest," New York: Dover Publications, 1973: 54.
43. Natash Lindstrom (@NewNatasha), "In addition to holding up signs such as 'Abolish White Supremacy Systems,' protesters sing: '#DaunteWright was a freedom fighter and he taught us how to fight.' So we gonna fight all day and night until we get it right. What side are you on? We're on the freedom side," *X, formerly known as Twitter*, April 13, 2021, 8:58 p.m. https://twitter.com/NewsNatasha/status/1382136237973192704.
44. Rebecca Rivas, "Demonstrators 'Disrupt' STL Symphony Singing a 'Requiem for Mike Brown,'" *YouTube Video*, 2:11, St. Louis, October 5, 2014. https://www.youtube.com/watch?v=T_7ErkQFduQ&t.
45. *Black Panther*, directed by Ryan Coogler (Walt Disney Studios Motion Pictures, 2018).
46. "N.Y. Free Clothes," *The Black Panther* Vol. 3, no. 28 (1969): 1–24.
47. Stan Lee and Jack Kirby, "Fantastic Four," *Marvel* Vol. 1, no. 52 (1966): Cover art.
48. Don McGregor, Billy Graham, and Bob McLeod, "Jungle Action Featuring the Black Panther," *Jungle Action* no. 19 (1972): Cover art.
49. J. Austin and B. Michaels, *Gay Life* Vol. 12 (1978): 15, 23.
50. Internal email to ULS staff, 2021.

Learning Assessment

Assessment activities designed to measure the impact of incorporating primary sources into teaching and learning are necessary for evolving and improving instructional practice, as well as informing educational partnerships going forward. In a separate research study sponsored by the Association of Research Libraries (ARL) Research Library Impact Framework (RLIF), librarians and archivists at Pitt explored how special collections support and promote teaching, learning, and research. As part of the study, the ARL project team at the ULS designed a lesson plan with a corresponding rubric that mapped to the ACRL RBMS/SAA *Guidelines for Primary Source Literacy* to influence and assess student learning. This toolkit provided a framework for planning, delivering, and evaluating instruction with primary sources. It also served as a mechanism for fostering educational partnerships by facilitating conversations about pedagogy, student engagement, and assessment of student performance. The results of these data are available as part of the ARL Research Report.[51] Assessment data gathered through the application of the toolkit continues to demonstrate compelling examples of student learning, thereby providing tangible evidence of the successful librarian/archivist contributions to the achievement of instructor learning goals. In a recent example, learning outcomes for students in a graduate education class included critically evaluating the perspective of the creator, situating the primary source material into cultural historical context, and providing evidence and analysis of power relationships. The librarian involved with this course was invited to attend the students' capstone presentations and observed examples of each outcome integrated with lecture content and course readings throughout the presentations.

Conclusions

The ULS participation in the Ithaka study on teaching with primary sources was valuable in launching a long-term process of inquiry into how instructors are inspired to use primary sources in their courses and the role of librarians and archivists as educational partners. The findings from both the local and capstone Ithaka reports significantly informed changes to teaching with primary sources at Pitt. They inspired new pedagogical practices incorporating technologies available in a renovated classroom, informed creative collaborations with instructors, and increased opportunities for dialogue, awareness, and action around systemic racism in the United States. The project team, along with ULS colleagues, now has a better understanding of how primary source engagement can advance conversations about antiracism and social justice issues. In addition, librarians and archivists are better prepared to incorporate hybrid and virtual learning environments through new tools and the exchange

51. Clare Withers, Diana Dill, Jeanann Haas, Kathy Haines, and Berenika Webster, *Library Impact Research Report: A Toolkit for Demonstrating and Measuring Impact of Primary Sources in Teaching and Learning* (Washington, D.C.: Association of Research Libraries, 2022). https://doi.org/10.29242/report.pitt2022b.

of ideas among a nascent community of practice. The results of the Ithaka study were operationalized at the ULS to inform educational partnerships and create pathways for innovation in teaching with primary sources. These experiences provide librarians and archivists with the evidence and confidence to grow beyond supporting a single class visit to offering more sustainable and measurable partnerships. These collaborations with instructors and students focus on scaffolded and experiential learning with primary sources that transcend the traditional research paper. The lessons learned show that librarians and archivists have the capacity to be more involved in curricula and pedagogy, and thereby can have an increasing influence on student learning with primary sources.

Acknowledgement

The authors participated among twenty-seven total partners in the Ithaka S+R Teaching with Primary Sources research project. This paper reports on the local findings for the University of Pittsburgh Library System. The full findings of the Ithaka study on teaching with primary sources can be found in the ULS local report[52] and Ithaka Capstone Project.[53]

52. Dill et al., "Teaching with Primary Sources at the University of Pittsburgh," 1–16.
53. Tanaka et al., "Teaching with Primary Sources," 1–56.

Appendix. Supporting Teaching with Primary Sources Interview Guide

Background

Briefly describe your experience teaching undergraduates. Examples: how long you've been teaching, what you currently teach, what types of courses (introductory lectures, advanced seminars) you teach

- How does your teaching relate to your current or past research?

Training and Sharing Teaching Materials

How did you learn how to teach undergraduates with primary sources? Examples: formal training, advice from colleagues or other staff, trial-and-error

- Do you use any syllabi, assignment plans, collections of sources, or other instructional resources that you received from others?
- Do you make your own syllabi, assignment plans, collections of sources, or other instructional resources available to others? If so, how? If not, why not?

Course Design

I'd like you to think of a specific course in which you teach with primary sources that we can discuss in greater detail.

- Do you have a syllabus you're willing to show me? I will not share or reproduce this except for research purposes.
- Tell me a bit about the course. Examples: pedagogical aims, why you developed it, how it has evolved over time
- Explain how you incorporate primary sources into this course. If appropriate, refer to the syllabus
- Why did you decide to incorporate primary sources into this course in this way?
- What challenges do you face in incorporating primary sources into this course?
- Do you incorporate primary sources into all your courses in a similar way? Why or why not?

In this course, does anyone else provide instruction for your students in working with primary sources? Examples: co-instructor, archivist, embedded librarian, teaching assistant

- How does their instruction relate to the rest of the course?
- How do you communicate with them about what they teach, how they teach it, and what the students learn?

Finding Primary Sources

Returning to think about your undergraduate teaching in general, how do you find the primary sources that you use in your courses? Examples: Google, databases, own research, library staff

- Do you keep a collection of digital or physical sources that you use for teaching?
- What challenges do you face in finding appropriate sources to use?

How do your students find and access primary sources?

- Do you specify sources which students must use, or do you expect them to locate and select sources themselves?
- If the former, how do you direct students to the correct sources? Do you face any challenges relating to students' abilities to access the sources?
- If the latter, do you teach students how to find primary sources and/or select appropriate sources to work with? Do you face any challenges relating to students' abilities to find and/or select appropriate sources?

Working with Primary Sources

How do the ways in which you teach with primary sources relate to goals for student learning in your discipline?

- Do you teach your students what a primary source is? If so, how?
- To what extent is it important to you that your students develop information literacy or civic engagement through working with primary sources?

In what formats do your students engage with primary sources? Examples: print editions, digital images on a course management platform, documents in an archive, born-digital material, oral histories

- Do your students visit special collections, archives, or museums, either in class or outside of class? If so, do you or does someone else teach them how to conduct research in these settings?
- Do your students use any digital tools to examine, interact with, or present the sources? Examples: 3D images, zoom and hyperlink features, collaborative annotation platforms, websites, wikis
- To what extent are these formats and tools pedagogically important to you?
- Do you encounter any challenges relating to the formats and tools with which your students engage with primary sources?

Wrapping Up

Looking toward the future, what challenges or opportunities will instructors encounter in teaching undergraduates with primary sources? Is there anything else I should know?

Gina C. Modero

The Special Collections Reading Room: A Study of Culture and Its Impact on the Researcher Experience

This article takes an anthropological approach to the special collections reading room by demonstrating that every reading room has its own culture. Cultural anthropology seeks to study the world and culture through human thought, behavior, and ways of life.[1] *By adapting this perspective to the reading room, one can see the forces at play that affect the way patrons and staff navigate the space. The culture of the reading room is shaped by the various systems put in place and can promote, or impede, a productive visit. A disjointed culture comes from the miscommunication between philosophy, policy, physical design, and atmosphere within the reading room. Techniques and policies used in the reading room are influenced by three main factors: access, security, and preservation. Aligning these methodologies with the ethos behind them disseminates important information to patrons; when out of alignment negative culture persists. The author examines the strategies at twelve libraries. The different practices and philosophies are analyzed through participant observation and interviews with librarians and archivists. Librarians can use their cultural authority in the reading room to determine what ethos is emphasized, curate a reading room that will facilitate success, and directly impact user experience by creating a positive cultural environment.*

Introduction

The reading room is the beating heart of the library. Without the reading room, a library cannot serve as a center for knowledge, learning, and collaboration. The items in special collections libraries are there because they hold cultural, artistic, literary, intellectual, and/or historical value. They must be preserved, maintained, and protected, and those who wish to study or explore these items must be able to access and use them. This article aims to take an anthropological perspective to the reading rooms of special collections libraries, and proposes that the formal reading room

1. Serena Nanda and Richard L. Warms. *Cultural Anthropology*. 10th ed. Belmont, CA: Wadsworth, Cengage Learning, 2011. 80.

inspires its own culture. The reading room is a self-contained and clearly defined area, and it holds special meaning to both staff and visitors.

If cultural anthropologists Serena Nanda and Richard Warms observed that culture "helps us understand" nature and meaning, and "comments on how we should act within the world,"[2] so, too, might one extend this sentiment to a library and its reading room: library culture engrosses staff and patrons, and helps us understand the nature and meaning of the spaces in which materials are used; the library's culture comments on who we are—users and staff—and how we should act within the reading room. The culture that is developed within the reading room is one that helps patrons and staff alike adapt to the circumstances within which they are placed. Culture is a mental template for organizing the world, and the culture of the reading room is, therefore, the template for organizing how to behave within the reading room, and within the library.

It is vital to acknowledge that each reading room has a different and distinct culture. The impact of strategy and policies applied within the reading room has differing effects on the culture, which in turn influences the experience of a researcher. Within the library space, the social logic comes from whoever is creating the guidelines, designing the space, and giving directions to those who wish to move in it. A library and its staff are the architects of their systems of logic and reason.[3] Library staff set the blueprint, thereby holding cultural authority and shaping the experience of readers. Decisions on security, preservation, and access can either aid or hinder the intended result, and thus influence the experience of the patron. Culture needs to be considered when creating policies or designing rooms so that they have the desired intention and effect, as opposed to having unintended consequences that could interfere with patron experience, access to information, safe handling, or staff environment.

For this article, twelve special collections reading rooms were chosen based on location (major cities with a population greater than one hundred thousand, as well as hubs for special collections libraries), prestige of collection, type (museum, university, public, or research), or uniqueness (in policy, collection, or reading room space). While only nine libraries are specifically referenced within, all twelve were influential in this article's analysis. The technique used is participant observation, which entailed gathering detailed observations on the social life of the library and its methods/theories/techniques. This was completed by examining the procedures, environment, and interaction with staff, and how they influence a reading room's unique culture and

2. Nanda, Serena, and Richard L. Warms, *Cultural Anthropology*, 10th ed. (Belmont, CA: Wadsworth, Cengage Learning, 2011), 81.
3. Thomas Augst and Kenneth E. Carpenter, *Institutions of Reading: The Social Life of Libraries in the United States* (Amherst: University of Massachusetts Press, 2007), 247–8.

affect both patrons and staff. In order to understand the ideas and intended meaning behind the methodology that runs through the reading room and its culture, one-on-one interviews with the librarians or archivists who work in these twelve libraries were also conducted.[4] This article examines the impact of strategy and approach on the culture of the reading room because understanding this culture can lead to more innovative ideas for serving material, and for patron experience.

Culture

"Culture" is an elusive word to define and has evolved through many different stages of definition, understanding, and schools of thought. There are various ways[5] of approaching culture within the field of Anthropology, from seeing culture as a force that is shaped by and shapes the personalities of its members, to seeing it as a way to give life meaning, to believing that culture can never be truly described due to inherent biases.[6]

A textbook definition is that "cultures are made up of learned behaviors,"[7] that is, they all have language and complex symbolic systems. Cultures are shared by groups; they contain information about how to survive in the world. Applied to libraries: the culture of a reading room must then have learned behavior, have a language and symbolic system, be shaped by a group, and contain information on how to "survive" within the room. The learned behavior is how to interact with the material in a safe and respectful way. The language and symbolic systems are words and symbols that are unique to the library or mean something different in a library setting. The information on how to survive is provided through the policies and guidelines of each particular library.

Culture can be regarded as a system of multiple elements that come together to form an interconnected whole.[8] The culture within reading rooms is a system of interrelated parts because the reading room has shared elements that determine how those within it perceive the entirety of the space around them. These interrelated parts develop a pattern of behavior in both staff and researcher that informs, and is informed by, the culture. There are three main components that feed the culture of the reading room: environment, policies and methodology, and the philosophy behind

4. The libraries and librarians interviewed are kept anonymous. They are referred to as Library A, Library B, Library C, etc.

5. Nanda and Warms outlined six characteristics that define culture, as well as twelve definitions that evolved based on different schools of thought. *Merriam Webster Dictionary* has six definitions, while *Oxford English Dictionary* offers fifteen (three of which are considered obsolete).

6. Nanda and Warms. *Cultural Anthropology*. 74.

7. Nanda and Warms. *Cultural Anthropology*. 74.

8. "Difficulties in Defining Culture." *Inter-culturally speaking*. https://www.conted.ox.ac.uk/courses/samples/inter-culturally-speaking-online/index.html#:~:text=Characteristics%20of%20culture&text=It%20is%20an%20integrated%20whole,provides%20a%20sense%20of%20identity.

the policies. Questions that drove my analysis included: What does a reading room's interior design communicate to the user? Are staff enabled to cultivate positive and collaborative interactions? How do the policies reflect the philosophy, and vice versa? For my research, it was important to observe both the abstract (i.e., atmosphere) and literal procedures (i.e., method of material delivery). These procedures could inform different aspects of the experience and culture. At Library F (research library in a major city), patrons had box access to archival materials, rather than accessing one folder at a time. This provided more patron freedom, which allowed individuals to proceed at their own pace, and created an allied atmosphere. Taken together, Library F produced trust through its literal procedures (box access) and reinforced a culture of collaboration via the abstract (an atmosphere where patrons viewed materials at their own pace). In the following sections, I will provide my assessments of the three main components that influence the culture of a reading room: environment, policies and methodology, and philosophies observed across the twelve reading rooms in my study.

Environment

The environment within a reading room is the combination of atmosphere and physical design. Atmosphere encompasses the feelings, energies, and attitudes of those in the reading room (staff or patron). The atmosphere within a reading room can clue one into how staff and patrons interact. The interactions of staff and patrons and their behaviors indicate how they feel both about—and in—the space. The space a reading room occupies is intellectual, and more than its physical characteristics alone. Aptly put by Augst and Carpenter, "the space books occupy is cognitive as well as physical."[9] If culture is the mental template for organizing the world, the atmosphere colors how individuals view and interpret the world around them, as music would in a film. Imagine watching a film in which two characters are talking. If ominous music were playing, you would interpret that scene as tension-filled or suspenseful. If upbeat and happy music were playing, it would be interpreted as comedic or cheerful. Music has a direct effect on the cognitive processing and emotional state of a viewer.[10] Atmosphere and energies are the incalculable—yet influential—forces in the reading room.

The physical design of the reading room affects how the space is interpreted. It informs visitors about the thinking behind what librarians hope the user experience will be, as well as how organizations decide their policies. The furniture in a reading room may be arranged in a certain way to counteract poor sightlines. This indicates a

9. Augst and Carpenter, *Institutions of reading*, 18.

10. Marilyn G. Boltz, "Musical Soundtracks as a Schematic Influence on the Cognitive Processing of Filmed Events," In *Music Perception: An Interdisciplinary Journal* vol, 18, no. 4. (University of California, 2001), 427–54.

design responsive to staff needs. The environment of the reading room is a combination of physical and mental curation—what are the physical limitations of the space, and how does that translate cognitively?

Library A (special collections within a university in a major city) has one reading room that sits between two different, unseen staff workspaces. To get from one workspace to the other required staff to maneuver through the reading room, tables, and patrons. The presence of staff was constantly felt, as they were continually walking in and out with carts and boxes, and holding whispered conversation. However, even with this placement, full-time staff were not easily available for questions. Library A was a place where people actively did their job to secure materials behind the scenes. What makes this an interesting example of a reading room's atmosphere is that while physically patrons were in the center of it all, they were not the priority. The placement of patrons was contradictory, creating atmospheric tension within the room.

Adding to this feeling in Library A was the sensation of clear separation between staff and patrons. Staff were seen and heard, but there was little to no interaction or collaboration. This presented an interesting twist on access. Traditionally,[11] patrons feel more barriers between themselves and the material; in Library A, it was the opposite. There were few barriers between patron and material, and more barriers between patron and staff.

In direct contrast was the reading room of Library B (research library in a major city), where staff workstations were located in the reading room and therefore clearly seen and available to patrons. It created an open line of communication. At one point during my visit, a patron walked up to someone working at his desk,[12] along the edge of the reading room, and asked a question. This ease to have questions answered reinforced the accessibility of staff and the openness of the reading room. The setup of a reading room like that at Library B can be a great tool to aid in collaborative processes because it set the atmospheric tone.

Culture is a manifestation of social elements. It does not produce society but is the product of society. Therefore, when negative or positive elements come together they can produce aspects that are then demonstrated by the culture. The reading rooms of Library A and B had elements that positively or negatively affected the patron, which were then mirrored back within its own positive or negative culture. Atmosphere and physical design encapsulated these elements, which combined to create the environ-

11. Tara Wenger, "Welcoming Undergraduates to Special Collections," *Kansas Library Association College and University Libraries Section Proceedings*: Vol. 2: No. 1 (New Prairie Press, 2012), https://doi.org/10.4148/culs.v1i0.1617.

12. Individual desks at Library B were separate from the check-in and reference desks.

ment of the two distinct reading rooms. It is not a question that each reading room is unique and has different strengths and weaknesses. These strengths and weaknesses were illuminated in how the spaces were curated and maintained, both physically and psychologically.

Policies and Methodology

The policies within a reading room are the backbone for the entire operation. Without policies, rules, or guidelines, the reading room would be chaotic, and the risk for damage or loss would increase. The policies within a reading room are the key to deciphering the culture. Reading room policies are understood to represent handling guidelines, user interaction, outside materials not allowed in (food, drink, bags, coats, etc.), and reading room workflows or procedures. Through policies, patrons learn to navigate handling materials, interact with staff, and generally move throughout the space. While there are some policies that are uniform across special collections, others seem to be in opposition. For example, every library I surveyed required the use of lockers for patrons to store their belongings. On the other hand, a contradictory policy was the use of notebooks. Notebooks were only allowed at six of the libraries. The "no-notebook" rule was theoretically for security reasons, but the reasoning is unconvincing when one considers the recent history of large-scale special collections theft.[13] Of the libraries that did not allow notebooks, only Library F examined the individual sheets of paper at the end of my visit, backing up their no-notebook policy. If that was a procedure, and one could also, theoretically, examine the pages of a notebook, then why were notebooks prohibited? The only reading room that inspected my laptop was Library G (university library in a suburban municipality), which also allowed notebooks. This kind of contradiction can be frustrating to patrons. If one's notes are in a notebook, which they are allowed to bring to one reading room—but cannot to another— the sudden shift can yield confusion and a negative perspective. This unease influences patron's reactions to other policies and colors their experience.

The language used to write these policies is important and should not be overlooked by reading room policymakers.[14] Language is itself a social action and cultural resource. As Alessandro Duranti said, "Language [is] a set of practices, which play an essential role in mediating the ideational and material aspects of human existence and,

13. Michael Blanding, *The Map Thief: The Gripping Story of an Esteemed Rare-Map Dealer Who Made Millions Stealing Priceless Maps*, (Gotham Books, 2015). Bregman and Tenney warned that "laptop computers also present their own set of hazards ...drives can be used to conceal materials." Alvan Bregman and Margaret Tufts Tenney, "Special Collections Reading Rooms," in Everett C. Wilkie, Jr., ed., *Guide to Security Considerations and Practices for Rare Book, Manuscript, and Special Collection Libraries*, (Chicago: ACRL, 2011) 13.

14. "ACRL/RBMS Guidelines Regarding the Security of Special Collections Materials," (Association of College & Research Libraries (ACRL), 2009), Revised June 2023, https://www.ala.org/acrl/standards/security_theft.

hence, in bringing about particular ways of being-in-the-world."[15] Within the reading room, language is very important to patron understanding, since it acts as a tool with which one can function successfully. By refining the verbiage in the guidelines, one can hope to make policies more understandable; complicated language leads to misunderstanding, confusion, and can ultimately result in intimidation or an uncomfortable experience for both patron and librarian. To encourage strong collaboration between patrons and staff, both of whom can come together to uphold policy, clear and detailed instructions are needed. Intentional policy drafting and considered language allows for staff to have a positive social impact on the culture of the reading room. It ensures that a cultural resource (language) is available, and also positively impacts how special collections are regarded by the public.

Philosophy

Revealing the thought processes and strategies that go into creating the reading room demonstrates whether staff hopes for patron experience successfully translate into the culture. Did archivists' and librarians' intentions come through? Did the intentions translate to the patron/cultural experience, or was there a disconnect between what the librarians hoped a policy would achieve and what that policy actually communicated to the patron? To gather data for this portion, I interviewed various reference librarians and archivists to determine the thought processes that influenced their reading room's guidelines, physical arrangement, and patron interaction.[16] In these discussions, it became clear that the philosophies of the staff and institution heavily influenced reading room culture.

Library A operated under two responsibilities: primarily to protect the material, and secondarily to serve the researcher. This kernel of philosophy radiated into the culture through chosen policies, staff organization, and reading room arrangement. Library A's policies catered to the need that material lasts; policies were based in a particular kind of service, "service to the material itself and secondly, service to the researcher interested in it."[17] Therefore, when communicating with patrons the rule of thumb was, as one librarian described it, to engage with patrons with "polite firmness. We need to think about the fact that the patron is not always right. When push comes to shove, the material is the most important."[18] Thoughts and attitudes such as this were seen in Library A's policies, one of the few in this study that operated with folder-level access.

Library I (university library in a major city) operated with access as its focal point. The key principle to Library I's policies was that any task was secondary to the re-

15. Alessandro Duranti, *Linguistic anthropology*, (New York: Cambridge University Press, 2013) 5.
16. See appendix A for interview questions.
17. Librarian at Library A. Interview by author.
18. Librarian at Library A. Interview by author.

searcher, and staff did all they could to maintain a collaborative environment between staff and patrons, and among staff members. In discussions with staff, phrases such as "keep the user in mind" and "the stuff [i.e., library materials] should never precede the person"[19] were used. Library I has one of the most patron-driven reading rooms, which is reflected in such policies as box-level access and biweekly staff meetings to discuss user experience.[20] Another patron driven library was Library L (public library in a major city, with a separate reading room for its special collections), which made sure to imbue "warmth"[21] into every interaction, purposefully, to combat patron anxiety. It had the longest check-in process, where each patron had an extended one-on-one orientation with a librarian. Its philosophies were in alignment and supported its policies, which positively impacted the culture of the reading room.

Library C (museum research library in a major city) welcomed walk-in patrons. Therefore, many patron visits tended to be spur-of-the-moment, by people who had no experience with special collections, or the security procedures and registration involved. The consequences of theft and the worry surrounding security were felt in Library C's procedures and methodology. When working in the reading room, staff reported being "very aware [and to] always have eyes on people." A staff member observed, "you never know what can happen. You have to keep your guard up because people can take advantage."[22] However, in my one-on-one interviews, staff emphasized that they appreciated when someone came in who may have never been to a special collection before, and valued "when people come in and [are] excited."[23] This sense of awe and excitement is what staff hoped the experience was like for all patrons. Library C was a case where the desire of staff did not translate in the way intended. Hoping a patron has a sense of excitement when encountering material versus feeling exhausted by patrons who do not understand the space they are entering—plus feeling anxiety toward security that manifests as a need to constantly watch them—are very different. The hope for patron experience created tension with the strategy behind the policies due to their conflicting goals.

In the reading room, librarians hold cultural authority, but Library C illustrated how patrons themselves contributed to the culture of the reading room. If staff understood why they asked a researcher to change a particular behavior or follow a policy but the researcher did not understand, then the patron felt persecuted. The librarian must balance the negative effects that arise from inconsistency between philosophy,

19. Librarian at Library I. Interview by author.
20. Librarian at Library I. Interview by author.
21. "Warmth" was a specific goal/word choice. Librarian at Library L wanted patrons to "go away feeling like it was a good experience as a reader dealing with staff socially, as well as dealing with the collections because sometimes it can seem cold." Librarian at Library L. Interview by author.
22. Librarian at Library C. Interview by author.
23. Librarian at Library C. Interview by author.

policy, and atmosphere, which created a disjointed culture and affected all those in the reading room. The cultural authority holders (library staff) construct the reality[24] of the reading room and must ensure cohesion between the how and why of their space.

Access versus Security versus Preservation

From what was learned about the methods and strategies of all twelve special collections reading rooms, one thing stands out: the main motivator that shaped policies and staff-patron interaction was whether the institution emphasized access, security, or preservation. Most libraries endeavored to keep a balance, but usually one goal was emphasized. This rendered access, security, or preservation the greatest influence on the culture within the reading room. The competition and lack of balance among these priorities are the framework for the ethos that guides the libraries' decision-making.

Procedures give information on how to "survive" within the reading room. When out of balance, the culture suffers and the blueprint for moving within the space becomes confusing. If a library's procedures emphasized preservation, then the information disseminated to patrons focused on care of the material. Too much emphasis sent a message of "hands off." If a library's procedures emphasized access, the information passed on was that this material was for everyone. However, without effective rules or guidelines, institutions risked damage to the materials and potentially lost future research possibilities. If security was most important at a library, then the subliminal message was that patrons posed a risk and must be surveilled. Patrons felt intimidated, but the material was secured. The messaging within these key influences deeply affects the modus operandi that created, and continually seeped into, the culture. All libraries in the study attempted to find a balance between preservation, access, and security, but it was noticeable when one of those aspects was emphasized over another. Prioritization of one of these aspects, I observed, deeply impacted researcher experience. If a balance was successfully struck between the three, it provided the patron with a clear understanding of the nature and meaning of the special collections library, and how to achieve success within it. Staff and patrons working together ensured the preservation of valuable materials and the success of research, and enabled everyone to navigate the security policies.

Institutional Influence

The parent institution also has an important effect on the reading room's culture. Many of the libraries in this study are independent from their parent institutions with regard to day-to-day decision making and changing or improving policies. However, that does not mean they are not influenced by the institution that surrounds

24. Tiffany Jenkins, "The Crisis of Cultural Authority," essay in *A Museum Studies Approach to Heritage*, 1st ed., (London: Routledge, 2018) 2.

it. If culture is made up of learned behaviors,[25] one can argue that a reading room contains not only the learned behaviors of its patrons and staff but also the learned behaviors resulting from its parent institution's ideologies, which in turn affects the policies the library enforces.

There are special collections within public libraries, museums, universities, and private libraries. The way these intertwine can be illustrated by a matrix chart (Appendix B). The *x* axis represents museums. At one end reside the traditional preservation- and security-driven museums; you're invited to look but not touch.[26] At the other end are museums that encourage a sensory experience. The *y* axis represents libraries. On one end would sit public libraries: access driven, free and open browsing, a tactile environment. At the other end are subscription libraries, where access is only granted to those who pay a membership fee. Special collections reading rooms are a hybrid between museum galleries and public libraries; they balance patrons and artifacts. This matrix may not be forever, as more special collections libraries become open access. For example, private libraries, which one would think are closer to subscription libraries, fall closer to the middle, as many allow independent research of their collections.

One of the biggest motivators toward where a reading room fell on this matrix was the type of parent institution, which also led to varying degrees of strictness when it came to accessing or using material. The parent institution at Library H was a university. Library H was patron-centric, with an eye toward security. Its policies were firm but educational, and encouraged questions. One of the founding goals was to aid in students' research and learning. The parent institution at Library D was a museum. At Library D, security guards escorted patrons to the reading room. The parent institutions' ideologies greatly influenced policy design and enforcement, which impacted the culture of the room.

Conclusion

Libraries are storage facilities, book processing centers, intellectual banks, and service hubs all wrapped into one. The library is an important body of human knowledge, and the formal reading room is the beating heart of the library. Libraries are special places because they are uniquely important to the preservation and growth of human knowledge and culture. They exist as the gateway for people to access that knowledge and culture. The special collections reading room gives the library a sense of place, where innovation and collaboration come together to inspire new ideas and ways of thinking. Without a properly curated room, the special collections library operates ineffectively because it fails to cultivate a culture that positively impacts research, user experience, and care of materials.

25. Nanda and Warms, *Cultural Anthropology*, 76.
26. Tiffany Jenkins, "The Crisis of Cultural Authority," 24.

Nothing in the special collections reading room is by chance. As demonstrated in this study, everything has a purpose or a message to convey. Choices, behaviors, and philosophies made by staff are important contributions that translate into the overall culture of the reading room, reflected by the environment, policies, and patron experience. Identifying this is key, and as Totleben and Lacher-Feldman said, "recognizing and valuing differences and strengths offer insights into the identity and organizational culture of the library."[27] Each reading room in my study had a distinct feel and nature; no two were the same. A reading room may feel similar and remind you of another, but each is unique. Researchers' ingrained ways of behaving must be altered, and doing so will require a mental reorganization facilitated by staff.

The role of a special collections librarian is an interesting one because there are two motives seemingly in conflict: the need to protect material, and the desire to connect patrons to that material in the most efficient and helpful way. Most of the time, these two ambitions align. But when they do not, it negatively impacts the culture of the reading room. The conscious decisions made by librarians play a role in implemented procedures and day-to-day interactions. Just as important, however, are the subconscious intentions staff may not realize are communicated to patrons. There are "oppositions in the library's many meanings. While it can be a 'fine, meditative space,' the library can be a site of 'conflict and devastation' too; it 'can be threatening as well as nurturing.'"[28] A reading room becomes intimidating and adversarial when contradictory behaviors, policies, and philosophies interact. Reading room staff can articulate that access is the primary goal, but if staff subliminally treat patrons like potential criminals, then there is a subconscious intention that prevails. The mission of Library C, for example, was to connect researchers with historical material related to the museum's collections. However, in my discussion with the librarian, she mentioned the threat to security multiple times. In that space, there were always four to five people watching the reading room at once. The subliminal messages did not align with the conscious mission, causing tension, which made for confusion on the part of both patron and staff, as well as in the policies enforced. There is nothing wrong with choosing to make security a priority; the problem resides in its conveyance. Similarly, at Library D (also a museum library in a major city), it was clear that preservation was a top concern. The difference was that this edict, and the rationale behind it, were directly communicated to patrons both explicitly through email and implicitly through policies such as washing one's hands and not being allowed to turn the page of a book with a pencil in hand. Successful policies must reflect the ethos.

27. Totleben and Lacher-Feldman. *Creating a Holistic Fabric of Services and Collections from the Inside Out*. 40.

28. Crawford, Alice. *The Meaning of the Library: a Cultural History*. Princeton University Press, 2015: xxiii.

This exploration into the reading rooms of special collections libraries reveals that the culture was dependent on atmosphere, interior design, policies, and philosophies behind designing those policies. These cultures can be curated to benefit librarians and aid them in creating a safe, positive, and collaborative experience for everyone. Librarians are just as affected by the culture as the researcher. To encourage positive staff interaction, the culture needs to aid them in communication and support what they are trying to achieve.

This study was undertaken during a time of change for special collections, as people within the field pushed for more access and less intimidation. Librarians, to varying degrees, have focused on improving access in many places while also improving security. Some recurring words from the various interviews conducted were "welcoming," "collaboration," "partnership," "transparent," "seamless," and "successful." Librarians and archivists are making strides to emphasize both preservation and access. By marrying philosophy and policies, having an intentional space, and providing support for staff and patron collaboration, special collections can create an optimal culture. The cultural power of the reading room, the center of the library, needs to be taken into account to provide a successful patron experience.

Appendix A: Interview Questions

Below are the guiding questions used. The author also allowed room for conversation to flow or interviewees to discuss anything they felt important to include.

Library:

1. What is your definition of a special collections library?
   a. How does your library subscribe to that definition?
2. How do you define the success of your library?
3. What is the purpose of this library?
4. How long have you worked at this library?
5. What is your interpretation of the physical space in the library? How is it curated?
6. Are there any factors specific to your library that affect how the reading room is run?
7. What is the best part about your reading room? Your least favorite aspect?

Reading Room:

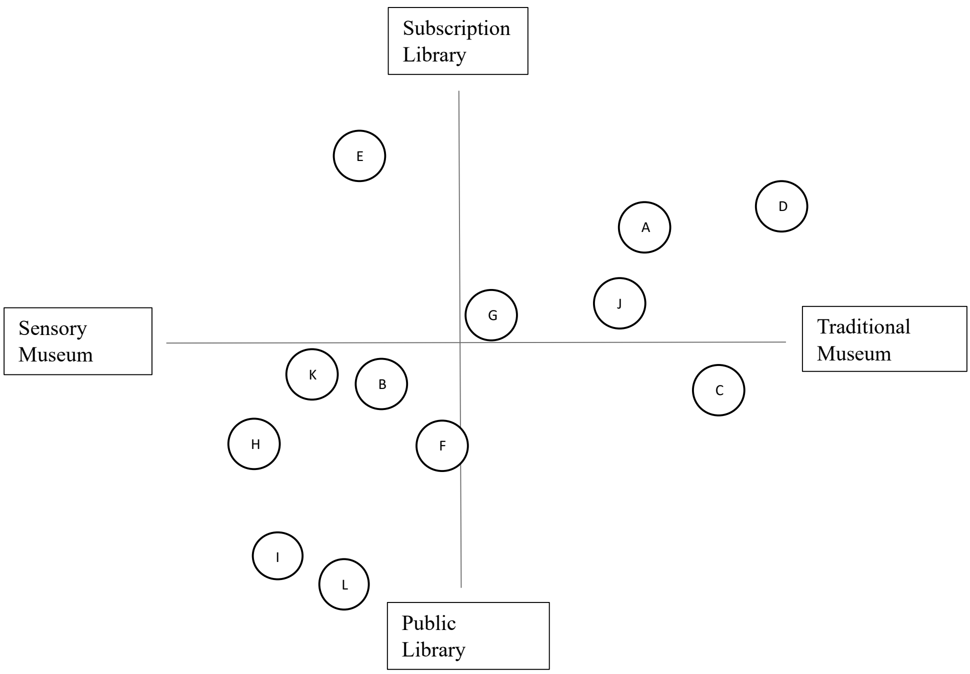
8. Who developed your reading room policies?
9. What kind of policies do you employ?
10. Have they ever changed over the years?
11. Is there a philosophy/methodology behind the practice that you prescribe to?
12. How do you staff your reading room? Why? (Scheduling vs. actual handling)
    a. What special knowledge, skills, and abilities are needed? What techniques and methods?
    b. What tools are involved? How and when are they used?
13. Do you have a manual for employees?

Researchers:

14. What kind of researchers are the most successful here?
15. How do you communicate with patrons? (Within Reading Room or remotely?)
16. Do you have a strategy when dealing with patrons?
17. What are you hoping the experience is like for researchers?

Appendix B: Institution Matrix

Libraries have been placed based on the following criteria: parent institution, level of access, level of security, or level of preservation*



Key

Sensory Museum: Low security, low preservation

Traditional Museum: High security, high preservation

Public Library: Low security, high access

Subscription Library: High security, low access

* These levels should be taken in context with the fact that there is a baseline level of each for all special collections libraries: i.e., low security does not mean no security.

Book Reviews

RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage reviews books, reports, new periodicals, databases, websites, blogs, and other electronic resources, as well as exhibition, book, and auction catalogs pertaining directly and indirectly to the fields of rare book librarianship, manuscripts curatorship, archives management, and special collections administration. Publishers, librarians, and archivists are asked to send appropriate publications for review or notice to the Reviews Editor.

It may not be possible for all books received to be reviewed in *RBM*, but the reviews appearing in the print journal are supplemented by a larger number of reviews published digitally on the RBM digital platform at https://rbm.acrl.org/index.php/rbm/pages/view/reviews. Books or publication announcements should be sent to the Reviews Editor: John Henry Adams, j.adams@missouri.edu, Research and Instruction Librarian, University of Missouri, Columbia MO, 65201.

Richard Ovenden. *Burning the Books: A History of the Deliberate Destruction of Knowledge*. Cambridge, MA: The Belknap Press of Harvard University Press, 2020. Hardcover/Paperback, 308p. $29.95/$17.95. (ISBN: 978-0-674-24120-6/978-0-674-27110-4).

In the realm of libraries and archives, where knowledge is safeguarded and curated, *Burning the Books: A History of the Deliberate Destruction of Knowledge* by Richard Ovenden delves deep into the historical tapestry of the destruction of knowledge, heroic acts of preservation, and the individuals who have played pivotal roles in the safeguarding of our shared cultural heritage. Ovenden explores the profound significance of libraries and archives, not just as repositories of information but as institutions that have shaped the evolution of societies, ideologies, and identities.

In this insightful exploration comprising fourteen chapters and a coda, Ovenden presents distinct case studies and themes, interweaving historical accounts with personal narratives and philosophical reflections. His work excels in highlighting the myriad ways in which knowledge has been both threatened and preserved across history. Each chapter presents at least one case study (typically more) that examines a specific event or type of event that has shaped the trajectory of knowledge. From the ancient libraries of Ashurbanipal to the burning of the University of Louvain's library in 1914, Ovenden masterfully captures the emotional weight of these episodes while situating them in their historical and cultural contexts.

He begins by noting the differences between libraries and archives and points out that the act of selecting material and curation is not and never has been neutral as it shapes the narrative of history itself. Subsequent chapters are in chronological order, beginning with the library of Ashurbanipal and ending with the current world of data. Each chapter touches on a theme—the need to combat complacency, the consequences of the suppression of knowledge, the horrors of cultural genocide—as well as difficult decisions regarding curation, the preservation of personal archives, and the construction of archives. By drawing connections between seemingly disparate events, Ovenden illuminates a thread of continuity running through time, reinforcing the critical role of libraries and archives in preserving humanity's collective memory.

Particularly notable is Ovenden's meticulous research, which spans from classical antiquity to the digital age. He deftly navigates through historical records, weaving anecdotes of antiquarians, scholars, and librarians to underscore the significance of knowledge preservation. His ability to humanize historical figures, such as John Leland and his role in the Reformation in England, allows readers to empathize with the challenges faced by those who sought to safeguard knowledge during times of upheaval. One of the most emotional chapters focuses on World War II Germany and the extraordinary efforts of individuals such as Herman Kruk, Moshe Abramowicz, and Dr. Antanas Ulpis to save as much Jewish culture and knowledge as possible through the preservation and smuggling of books and manuscripts.

The chapters on the destruction of libraries during wartime, such as the burning of the Library of Congress (twice), and the destruction of the National and University Library of Bosnia and Herzegovina in 1992, are powerful reminders of the cultural genocide that occurs when knowledge is targeted. Ovenden points out that archives are often targets of attack because they house the records of the people living in the area and, especially for former colonies, can be embarrassing or troublesome for the colonizers. Alternatively, the successful preservation of at least some part of these archives can help heal. An example of this healing aftereffect is the manner in which Germany handled access to the records of the Stasi after the fall of East Germany. By exploring deliberate acts of destruction and their aftermath, Ovenden highlights the symbolic weight of libraries and archives as bearers of identity and heritage.

The main weakness of *Burning the Books* is its focus on Western libraries, archives, and case studies. While the book briefly discusses cases from Iraq, Algeria, and other regions, these examples are supplied in connection to European or American involvement. In one chapter, Ovenden discusses Iraq and the devastation wrecked on the country's records. However, the claim being asserted revolves around migrated archives. The various archive collections from Iraq are currently being "temporarily" housed in the United States. Although this case study covers Iraq and its archives, the main point is that the archives are held in the U.S. This geographic focus limits the book's range and neglects multiple examples from around the world. The destruction of knowledge and the need to preserve cultural heritage is not unique to the U.S. or Europe. In fact, the deliberate destruction of knowledge may even occur more frequently in other parts of the world due to the aftereffects of colonization. The narrow scope of the book has the potential to leave readers with an incomplete understanding of the global network of knowledge.

Moreover, while Ovenden discusses the significance of each case study, some chapters could benefit from a more explicit connection to the broader theme of libraries and archives. While many chapters delve into the destruction of libraries, it would be enriching to explore the methods by which these libraries were organized, curated, and used, tying these practices to broader notions of knowledge preservation. One of the few libraries that is discussed in great depth is the Bodleian Library, which Ovenden directs.

Burning the Books addresses a profound need to recognize the historical and contemporary importance of libraries and archives. In an era marked by digital information overload, loss of personal data, "fake news," and misinformation, Ovenden's work serves as a rallying cry for the preservation of truth, culture, and identity. By highlighting the destructive forces that have targeted caches of knowledge throughout history, Ovenden underscores the urgency of preserving these repositories as anchors of truth in a sea of uncertainty. He also underscores the importance of personal archives and an individual's right to choose what happens with their work and/or data. This is especially prevalent in the final chapters as Ovenden delves into the modern digital age and the subsequent need for continued open access to information and data.

Ovenden's book is a powerful reminder of the importance of the preservation of information and knowledge. It reveals the intricate interplay between knowledge, power, and preservation, and is a helpful resource for educators, historians, archivists, and librarians seeking to illuminate the role of libraries and archives in society. The book's unique strength, however, is its ability to engage a general audience. Ovenden does not use any jargon without providing an explanation of its meaning. Moreover, he gives the historical background for all of the events and information about all of the individuals involved. This in turn makes the complex topics Ovenden addresses easy to read and understand. This text is an effective tool for educating the public about the critical importance of libraries as bastions of culture and memory.

This work is exceptionally well suited for classroom settings, in which discussions of history, culture, and the preservation of knowledge are paramount. Its detailed research and engaging narrative style make it accessible to both academics and a general readership. Additionally, *Burning the Books* serves as a clarion call for governments and societies to recognize the indispensable role of libraries and archives, urging them to allocate resources to sustain these vital repositories and ensure the continuity of human knowledge and understanding.

In conclusion, Richard Ovenden's *Burning the Books* masterfully encapsulates the intricate dance between knowledge, destruction, and preservation throughout human history. By examining diverse case studies and drawing parallels across time, he reminds us of the weight libraries and archives carry as beacons of truth, culture, and identity. The book's strengths are its evocative storytelling, meticulous research, and overarching message that knowledge preservation is not only a historical endeavor but a moral imperative for a society seeking to understand its past, navigate its present, and shape its future. — *Ruthann E. Mowry, University of Illinois at Urbana-Champaign*

Audra Eagle Yun, editor. *Archival Accessioning*. Chicago, Illinois: Society of American Archivists, 2021. Paperback, 170p. $55. (ISBN: 978-1-945246-56-2).

Audra Eagle Yun's *Archival Accessioning* is an excellent introductory text for any archival practitioner looking to build an accessioning program or understand the distinction between accessioning and processing. Yun fills a notable gap in the literature by elevating the labor behind accessioning work and providing clear guidance on what accessioning entails. The work is divided into two parts: part 1 outlines the history, principles, and labor aspects of archival accessioning; the second section comprises case studies that apply these workflows to a variety of institutional types and material formats.

The first part provides a detailed overview of accessioning practices, from brief entries in logbooks to current emerging practices. This section excels at demonstrating how accessioning has always existed, although it has been on the sidelines of archival praxis and discussion rather than a core practice in an archives program. It distinguishes accessioning as its own collection management function and centers it as vital to an extensible processing program. Yun then proceeds to detail each stage of accessioning a collection, from pre-custodial interventions to provision of minimal access points. Yun also details the range of functions that a well-rounded accessioning program can contribute to, from broader collections assessments to reappraisal and deaccessioning work.

Part 2 is composed of a series of case studies from several practitioners that demonstrate how accessioning practices may differ across institution types, material formats, and different contexts such as deposits, retrospective accessions, and additions to existing collections. Far from being repetitive, these case studies capture the complexity of this labor and are necessary for understanding the practical application of accessioning practices. These case studies show how to approach a variety of collection types, including government records, institutional records, and personal papers, as well as formats including digital and audiovisual materials. These brief case studies complement the archival theory in part 1 by helping readers understand the extensibility and flexibility of accessioning principles.

Yun's book places accessioning within its broader contribution to an archives program, demonstrating its importance in praxis. Accessioning encompasses a broad range of activities to support the preservation of and access to newly received materials. Minimal and extensible practices are commonly practiced as a way to cope with the sheer volume of backlog and new acquisitions, and this work demonstrates how accessioning facilitates overall extensible workflows by creating good-enough minimal access points to the use of underprocessed and unprocessed materials. This is vital to the ecosystem of a repository where full processing is impossible for all collections due to the limited availability of labor and other resources, requiring that archivists provide access to unprocessed collections to prevent large, inaccessible backlogs. Archival accessioning is core to building a successful extensible processing program. Furthermore, accessioning practices augment other collection maintenance activities, such as reappraisal, retroactive accessioning, and deaccessioning. By providing an overview of how accessioning is core to various collection maintenance activities, Yun and the other contributors clearly elevate this previously underrecognized aspect of archival labor.

Archival Accessioning begins to fill a void in the professional literature around accessioning as praxis. Although it illustrates how principles of accessioning have been covered in archival literature, it also shows how it has remained undertheorized. Accessioning has remained on the periphery of archival theory, mentioned as an important collection management function within larger works; however, very little work has been published specifically dedicated to it. This work has further emerged at a time when job advertisements specifically geared toward accessioning are increasingly being advertised, demonstrating an industry-wide emphasis on its importance. The creation of these positions and the lack of focus on accessioning in archival literature makes the need for standards and best practices on archival accessioning practices clear. This book is a necessary start toward filling that gap. As an introductory text, it was published at a particularly opportune time in 2021 because a multiyear grant for a National Best Practices for Archival Accessioning Working Group (of which Audra Eagle Yun is a member) was funded by the Institute of Museum and Library Services (IMLS) the following year specifically to create more in-depth standards. Within this context, this book will continue to serve as a concise overview of accessioning practices and case studies to be used in conjunction with these emerging best practices.

Archival Accessioning's chief strengths are its approachable and straightforward writing. The overview of accessioning in archival literature, introduction to accessioning workflows, and case studies all provide an easily understandable and applicable guide to accessioning work. The initial overview of accessioning's place in library and archival literature provides important context to how these principles have existed on the periphery of the literature for over a century, acknowledged as important but not emphasized, while also demonstrating its emergence as a focus of extensible workflows. The discussion of archival principles clearly outlines an accessioning workflow and successfully articulates the many components necessary toward successfully intaking, establishing control, and providing baseline access to newly acquired collections. The second chapter on "establishing an accessioning program" is especially useful in advocating for the importance of accessioning labor and is a clear, concise tool for establishing local workflows. The case studies in part 2 expand on this chapter by providing guidance on the practical application of these principles. Because an overview of broad principles can feel abstract and difficult to visualize, these case studies are useful in better understanding how accessioning principles can be successfully applied in a variety of institutional and materials contexts.

Although chapter 4's focus on reappraisal and deaccessioning may seem outside the scope of a work on archival accessioning, its inclusion reinforces how these activities are connected to an accessioning archivist's role in providing baseline intellectual and physical control of collections material. This chapter shows how accessioning's core functions of baseline control, documentation, and access are embedded throughout a collection management program, as well as how an accessioning archivist is part of the overall health of a collection development program beyond the initial intake of new materials.

While this volume is compact and highly approachable, it leaves the reader wanting *more* detail on accessioning best practices and how accessioning differs across institutional types. The chapters on accessioning institutional records and governmental records are very short in contrast to the more detailed, practical chapters. Researchers would benefit from having a more robust, practical discussion about managing government and institutional records. The volume would also benefit from more robust exercises and sample tools. Although the case study section is listed as "perspectives and exercises," it is lacking in discussion questions or problems for readers to work through themselves and, although these chapters provide good, thoughtful case studies, the exercises themselves are lacking. The idea of "exercises" gives the reader the impression of reading more of a workbook, with training text and practical problem sets to work through at the end of each chapter. In addition, this volume would benefit from additional sample forms and tools. The sample checklist and worksheet in chapter 8 are useful but somewhat out of place in that they are the only appendixes or tools in the volume. If each case study included similar work samples, or if the entire volume itself contained an "accessioning toolkit" appendix, it would increase the ability of practitioners to adapt accessioning practices based on this volume's guidance.

However, these minor limitations do not detract from this work's value and importance. Yun has assembled an incredibly ambitious volume, which provides a simultaneously high-level and detailed overview of different aspects of accessioning, depending on the chapter. No single, small volume could possibly tackle the complete, broad umbrella of accessioning practices across all institutions, formats, or acquisition types. This is especially true because best practices for accessioning are still under development: the National Best Practices for Archival Accessioning Working Group's final best practices are forthcoming in Fall 2024.

Archival Accessioning is a well thought-out and planned volume intended to help archivists create their own accessioning workflows. For an introductory volume establishing the importance of accessioning as core to archival workflows, this book is necessary for learning about accessioning practices, how they differ from archival processing, and where accessioning fits within an overall collection management program. While brief, this book does a great job providing readers with a variety of examples to capture the complexity and variability of accessioning practices suited to a variety of institutional types and format considerations. It is suitable both for writing local workflows and as a launch point for training technical services staff on the principles and steps required to properly ingest new and retroactive acquisitions. *— Alexandra (Lexy) deGraffenreid, Eberly Family Special Collections Library, Pennsylvania State University*

Dennis Meissner. *Arranging and Describing Archives and Manuscripts.* Chicago: Society of American Archivists, 2019. Paperback, 224 p. $69.00 (ISBN: 9781945246074 / 9780838946480 / 9781945246098 / 945246073 / 0838946488 / 194524609X).

Arranging and Describing Archives and Manuscripts by Dennis Meissner—a book from the Society of American Archivists' "Archival Fundamentals Series III"—serves not only as an essential resource but also as a platform on which individuals and organizations in the archives field can endlessly build. This text evokes so many principles that I use to ground my own work every day; it also reminds me of how much progress our field has made in the time since this book's publication in 2019. The bright spirit and detailed content of this book are remarkable feats, even taking into consideration that it covers areas which deserve to be updated with more forward-thinking approaches.

Meissner's name might be immediately familiar to many because he co-crafted the "More Product, Less Process" (MPLP) approach with Mark Greene. Meissner, who is now retired, served as deputy director of Programs at the Minnesota Historical Society, made enduring contributions to our professional discourse, and (among many other accomplishments) was elected as a Fellow of the Society of American Archivists. His book is structured in seven chapters—along with a collection of six very illuminating appendixes crammed with practical examples—that explore the history, theory, and practice of archival arrangement and description. As I read this text, I was struck (over and over) by the intensely methodical approach Meissner takes to crafting this collection of information; it's difficult to write effectively about an expansive bedrock concept like "description" without getting tangled in the weeds, but he tackles some very complex concepts successfully by deploying exceptionally clear prose.

Chapter 1, "The Context and Significance of Arrangement and Description," covers the rough history of how thoughtful, structured forms of archival description emerged and evolved. Meissner also explores concepts and tools that are currently embedded in every layer of our professional practices. This early chapter is critical: it establishes a vocabulary and framework that readers can use and recognize. Chapter 2, "Principles of Archival Arrangement," builds upward and outward toward discussions of control, original order, and the burden of archival (in)decisions:

> Archivists do themselves no favor by choosing to process one collection in an impeccable manner if doing so leaves them with insufficient resources to process the other collections in their repository. That misguided logic has been a big factor in the growth of unprocessed backlogs in many repositories (33).

Truly, here is the tension that many of us feel both in the background and in the foreground of our descriptive work: *How can we? But how can we not?* This is also a good example of an ethics-informed undercurrent Meissner makes present from the beginning—if we aren't mindful of the implications of a continued imbalance of resources (e.g., acquisitions versus capacity to make acquisitions visible and accessible; highly controlled environments that protect materials versus carbon footprint of resource usage for collection control), then we are at risk of undermining some of the most essential tenets of archival description. MPLP was meant to help prioritize energy and tools, to support more strategic application of resources without dooming acquired archival materials to invisibility. Meissner's mention of "misguided logic" indicates that one-pass perfection shouldn't be the end goal of archival description; rather, we should be striving toward the use of arrangement and description practices that can ensure transparency, focus resource usage, and be scalable.

Chapter 3's focus on the principles of archival description makes the book's ethical undercurrent more prominent. Through Meissner's discussion of the finding aid functionality and the importance of descriptive standards, we see how context and structured data become necessary elements of accessibility and visibility. Expansive, structured description for materials *and* creators is now more explicitly framed as an ethical imperative:

> The archivist's description of creator and context goes well beyond controlling names and relating the simple facts of custody. We are required to describe creator and context with the same care and intensity that we describe the records themselves (58).

Description must be diversified in terms of content and application, but to acknowledge that tension again: there are limitations that shape the arrangement and description we can do. And as the concept of sustainable stewardship becomes more broadly implemented throughout our profession, there's sharpened focus not only on performing archival labor that supports ethical collecting practices, but also on the necessity of ethical treatment of those within our profession.

In chapter 4, "Physical Processing and Arrangement," Meissner shows us how to assess collections' physical condition and how to make thoughtful decisions about which types of handling we devote energy to during the arrangement and descriptive processes. Chapter 5, "Describing the Materials," illuminates the confluence of tools, structures, and content that allow us to describe archival materials more generously within the scope of our stewardship. But we don't hear much about how description should be regarded as a living document, how it must be understood as a series of layers with endless potential for improvement. At least in this text, it feels like Meissner can't quite embrace the possibilities of that type of ever-long reassessment, and hence, practices related to reparative work are an "emerging trend" instead of a vital facet of the descriptive continuum.

The brevity of chapter 6, which focuses on nontextual formats, also lurks at the edge of the author's comfort zone. The information about photographs, born digital formats, and visual materials was clear and helpful but somewhat limited. Meissner's primary point is that we can rely on core archival concepts to guide our decisions about these less standardized materials, and he's not necessarily wrong. But we also need more expansive scholarship about the unique descriptive needs of born digital materials with an eye toward incorporating their stewardship needs throughout the lifecycle from appraisal, accessioning, processing, and storage to user access. I don't fault Meissner terribly for not digging deeper into it, but collectively we all need to stop shying away from engagement with this area of our work.

The final chapter, "Emerging Trends and Theoretical Shifts," is a useful highlight reel about challenges to concepts of original order, linked open data, and critical theory. This is also the section where culturally competent description and the right to control one's identity get mentioned. Every issue covered in this chapter deserves more screen-time than Meissner could spare, but he makes a commendable effort. For instance:

> In the same way that our own cultural frameworks shape our descriptions of archives, the archives we describe are themselves cultural constructs lacking objective meaning. They are shaped not only by their creators, but also by archivists who have in turn influenced their meaning by *selecting* them from among other documentation and then *arranging* them into some sort of meaningful construct (150, emphasis in original).

As archivists, we are constantly attempting to balance our professional identities, our conceptions of the profession's purpose, and the intense volume of labor required to perform our duties. Meissner is taking care to remind us that our decisions to acquire and describe materials have noticeable repercussions.

This book is appropriate for a multiplicity of audiences, especially when being used as

- a deep dive for folks approaching a fuller understanding of archival description;
- a text that can be read in part or whole for use in education, training, and upskilling;
- a high-level document of historical, practical, and theoretical approaches of the past century;
- a resource to examine established practices for ideas about how to improve workflows.

Emerging descriptive practices and standards already build on many of the approaches Meissner covers in this volume, which is indicative of this text's importance and its value. However, there are also opportunities for a new edition that incorporates more of what's now and what's *next*. Just like archival description itself, the work of explaining our practices is endlessly iterative. Dennis Meissner took on a nigh impossible project—just as Kathleen Roe and others have done before—and the outcome is a remarkably succinct volume that is both imminently helpful and somewhat limited. Whoever tackles the next interpretation of these concepts will have at least a few horizons to chase and big shoes to fill. — *Rosemary K. J. Davis, Beinecke Rare Book and Manuscript Library, Yale University*