Civics in the Archives: Engaging Undergraduate and Graduate Students with Congressional Papers

Danielle Emerling

ABSTRACT

This case study discusses an instruction exercise using legislative staff memoranda from congressional archives in graduate and undergraduate courses to teach civic knowledge, particularly the legislative function of the U.S. Congress and the legislative process. In 1997, the Children's Health Insurance Program (CHIP) was signed into law, making it the largest federal investment in children's health care since the creation of Medicaid in 1965. Senator Jay Rockefeller, who represented West Virginia in the U.S. Senate for thirty years, was a key sponsor of the legislation. The legislative staff memoranda preserved in his archives at West Virginia University Libraries offer a unique, behind-the-scenes vantage of how the policy developed in Congress and was later implemented in the states. In 2017, the congressional and political papers archivist at the libraries used legislative staff memos in instruction exercises with graduate-level public administration students and second- and third-year undergraduate students. The exercise introduced students to archives and to concepts of primary source literacy, and it demonstrated how congressional archives can be used in disciplines such as public administration and political science, which traditionally engage less with archives. As the archives profession focuses more attention on teaching with primary sources, this case study demonstrates how congressional archives, specifically legislative staff memos, can engage students with primary sources and impart important civic lessons. This case study discusses how the exercise was developed and implemented, and how assessment was conducted.

KEY WORDS

Archives instruction, Civics education, Congressional archives, Political papers, Primary source literacy

In 1997, the Children's Health Insurance Program (CHIP) was signed into law, making it the largest federal investment in children's health care since the creation of Medicaid in 1965. Senator Jay Rockefeller, who represented West Virginia in the U.S. Senate for thirty years, was a key sponsor of the legislation. The legislative staff memoranda preserved in his archives at West Virginia University (WVU) Libraries offer a unique, behind-the-scenes vantage of how the policy developed in Congress and was later implemented in the states. Despite a partisan political climate in the late 1990s, the CHIP narrative offers an example of bipartisanship and compromise. In 2017, the congressional and political papers archivist at WVU used the memos in instruction exercises with graduate-level public administration students and undergraduate-level political science and Honors College students. As the archives profession focuses more attention on teaching with primary sources, and educators seek ways to renew teaching of civic knowledge, this case study demonstrates how congressional archives, specifically legislative staff memos, can engage students with primary sources and impart important civic lessons. This case study discusses how the exercise was developed and implemented, and how assessment was conducted.

Teaching with Archives

As numerous authors have noted, archival professionals are increasingly being called upon to teach.[1] In response, the profession has spent more than a decade identifying the necessary attributes of primary source and archival education, and defining and framing primary source literacy. Authors continue to grapple with the realities of teaching and working with faculty to develop standards for primary source instruction assessment.

Early articles sought to define the necessary skills and knowledge for users to effectively work with archives. More than a decade ago, Elizabeth Yakel and Deborah Torres outlined the characteristics of expert archives users and identified three areas of knowledge—domain, artifactual, and archival intelligence—as necessary for working with primary sources effectively.[2] The authors' concept of archival intelligence, which encompasses knowledge of archival theories and practices, strategies for approaching unstructured problems, and intellective skills, echoes in more recent attempts to define archival and primary source literacies.

Archivists have also placed archival instruction within a broader educational landscape and examined different learning theories. Inquiry-based learning, sometimes referred to as active learning, has been singled out as a useful model for engaging undergraduate students because it seeks to make them active participants in the learning process with the instructor as a guide.[3] Educators may use a problem-based approach in which students use primary

sources to investigate a problem, while the teacher adds the right amount of context.[4]

Increasingly, archivists are connecting primary source instruction to the better established information literacy concepts that shape library instruction. Specifically, work has developed to place primary source literacy within the context of the Association of College and Research Libraries' "Framework for Information Literacy for Higher Education."[5] Primary source literacy includes consideration of description, relationships, meaning, and use of materials, as well as the ability to interrogate evidence for "credibility, trustworthiness, and accuracy using sourcing, contextualization, and corroboration."[6] Most recently, "Guidelines for Primary Source Literacy," developed by the ACRL RBMS-SAA Joint Task Force on the Development of Guidelines for Primary Source Literacy, were released in summer 2017,[7] and archivists are attempting to develop standards to better plan instruction, relate goals to faculty, and assess outcomes.[8]

While numerous repositories hold congressional papers, and no doubt utilize them for instruction, nothing has been written specifically about teaching with these types of collections. Modern congressional collections, which are created by members of Congress and the numerous staffers who work in member offices, consist of records in various formats related to legislation, press relations, constituent services, and political activities. Often the collections are voluminous, particularly for members who have served multiple terms, and contain information on a breadth of policy topics. Although their size and complexity make them cumbersome to work with, congressional collections are useful for introducing students to concepts of archival and primary source literacies, as well as imparting civic knowledge.

Teaching Civic Knowledge

Educational organizations have been pointing to a crisis in civic knowledge for more than fifteen years.[9] While no single definition of civic knowledge exists, it is generally accepted that its foundation is an understanding of the structure of government and the processes through which laws are made.[10] Experts report an alarming lack of historical and civic knowledge and engagement, including the statistic that fewer than half of Americans know that each state has two senators, and that four out of five Americans have not contacted their representatives in Washington.[11] Despite the trends, little has improved, and colleges and universities are doing little to remedy the situation, with college graduates showing as much ignorance of the American system of government as high school students.[12]

Experts argue that the value of civic learning is immense, creating "dispositions important in a democracy," such as a concern for others' rights and

welfare, fairness, and a sense of public duty. It promotes participation in voting, community meetings and volunteering, and elections. Furthermore, it supports understanding of economic and political processes.[13]

Congressional papers are rich with materials ideal for engaging students from numerous disciplines with civic knowledge concepts. Legislative memos, briefing books, and drafts of bills reveal the complexities of the legislative process; correspondence and interactions with state and local governments and interest groups reveal the path of policy development and implementation; and correspondence, press materials, and more uncover the political process and the functions of a congressional office.

The John D. Rockefeller IV School of Policy and Politics and the Archives

Archivists involved in instruction are well aware that successful integration of archival instruction in existing courses depends largely on the willingness and ability of faculty members to include the archives. Archival research is not the norm in the disciplines of public administration and political science, though some political scientists advocate their greater use.[14]

A unique relationship between the libraries and the John D. Rockefeller IV School of Policy and Politics supports the use of congressional papers in classroom instruction at West Virginia University. Senator Rockefeller donated his congressional papers to the libraries in November 2014 and at the same time established the school, which brings together the Departments of Political Science and Public Administration, as well as the programs of international studies and leadership studies. The senator and university administration made explicit the connection between the school and the archives, and they intended the archives to inform the development of future policy leaders and public servants.

The CHIP Lesson with Public Administration Graduate Students

The Master in Public Administration Capstone Seminar is offered each spring semester. Dr. Maja Holmes approached the archivist and requested materials from Senator Rockefeller's archives that would demonstrate leadership, governance, and how legislators gather and evaluate information. The archivist also reviewed the syllabus and identified concepts that students had been discussing in the course, such as communication strategies, identifying stakeholders, and leadership.

Members of Congress receive numerous memos from staff each day. Legislative staff members have expertise in one or more issue areas, serve as

trusted advisors, and have a role in shaping policy. While processing materials related to CHIP, the archivist found legislative staff memos that detailed bipartisan partnerships in the Senate, strategies for negotiating support for the senator's bill, and setbacks experienced in the Senate Finance Committee. Memos further outlined communications with the House of Representatives and the White House, particularly related to funding CHIP, and discussed relationships with the press and the West Virginia state government. The archivist selected six memos, dated from January 1997 to January 1998, that best illustrated the story of CHIP and the concepts identified in the syllabus.

In addition to the memos, the archivist prepared a worksheet with guiding questions (see Appendix A) and outlined specific objectives for the activity, including that students would

- Learn and apply basic archival documentary analysis skills;
- Examine the legislative process and bipartisan lawmaking;
- Identify the role of a legislative assistant in a congressional office; and
- Evaluate connections between CHIP and current health policy conversations.

The class met in the archives for two hours. The archivist gave students a brief introduction to the rules of using archives and explained basic information about the congressional archives held by the libraries, focusing on the Rockefeller papers. Students received an overview of the prepared activity and were asked to form six groups of three students each. Each group worked with a folder containing a single staff memo, a photocopied page of the *Congressional Yellow Book* from 1997 or 1998 for reference, and the worksheet. Groups were given approximately forty-five minutes to read the memos, discuss, and complete the worksheets. Students used the *Yellow Book* to answer a question about their memo author's role on the staff.

When the groups completed their analyses, they were asked to report to the class to construct a narrative of CHIP's development. Group one, which analyzed the earliest dated memo, reported first, and the class proceeded through group six, which had the latest dated memo. The archivist guided the discussion, provided context, and filled in gaps. The faculty member provided domain knowledge when students had questions relating to class concepts.

The archivist did not prepare a formal assessment for the class; however, the faculty member asked students to write reflections in a journal. Student reflections largely discussed the content of the memos and the lesson and its role in helping them better understand abstract concepts. Students noted the importance of words and tone in building support and communicating with key constituencies, the parallels between passage of CHIP in 1997 and the Affordable Care Act in 2009–2010, and the significant impact legislation has on individual lives. Most important, students recognized that it is worthwhile, and possible,

to participate in the policy process through roles in advocacy, analysis, and implementation.

Making Change through Politics with Undergraduates

WVU's Honors College named six Faculty Fellows to develop innovative courses in 2017. Political science professor Erik Herron's course, "Making Change through Politics," challenged students to connect the political process to problem solving and consider how society allocates resources.[15] The class consisted of twenty-one undergraduate students.

The students visited the archives for two seventy-five-minute instruction sessions. To keep group sizes to three to four students, the archivist chose an additional memo. The exercise was conducted in much the same way as the graduate class, but timing was shifted to accommodate a two-day instruction session. The most significant differences, however, were incorporating modern political events and two assessment tools.

The CHIP legislation was slated for reauthorization in 2017, but Congress failed to do so by the September 30 deadline. When the class met on October 10, 2017, Congress still had not taken action. This presented the opportunity for students to compare and contrast the current political debate to that of twenty years ago. The archivist printed a brief news story about how a lapse in federal funding threatened health coverage for nine million children and 370,000 pregnant women covered by CHIP nationwide.

In the first class session, as students registered to use the archives, they read the news story and answered three opening questions anonymously. The opening questions asked if they had used archives before, how comfortable they felt using archives, and what they hoped to learn in the class (see Appendix B). Eighteen students indicated they were not at all comfortable to somewhat comfortable using archives, while only three recorded that they were very or completely comfortable using archives. Students hoped to learn a variety of things, but these generally fell into three categories: nine students indicated they wanted to learn about archives, how archives are organized, and how to use archives; seven wrote that they wished to learn about the policy-making process and/or political history in the United States and West Virginia; and five wanted to know specifically about CHIP and children's health-care policy.

Following a fifteen-minute introduction to the archives, students broke into seven groups of two to four students per group. Each group received a memo, a copy of a *Congressional Yellow Book* page, and a worksheet and spent about forty-five minutes reading through its memo and answering the questions on the worksheet. For the final fifteen minutes of class, students were

asked to share their initial impressions of the memos and of the 2017 news story.

In the second class session, students spent five minutes to reconvene in their groups and review the worksheets they completed previously. For the next forty minutes, groups reported their findings to the class, asked questions, and discussed how their findings related to the themes of the course. The archivist then spent fifteen minutes discussing how students can find archives for their own research and introducing them to the finding aids available through the libraries. Students spent the final fifteen minutes of class completing a reflection exercise (see Appendix C).

The exercise asked students three questions, including what they learned about the legislative process and policy creation that they didn't know before; how the archives they examined informed their class discussion; and how comfortable they felt using archives after completing the lesson.

Most students wrote that they had previously been unaware of the role staff members play in congressional offices and how they now understand the significant impact staff have on the legislative process. They noted that, in the memos, staffers instructed the senator on appropriate actions to take each step of the way. Students also reflected on "how involved" legislating is, particularly mentioning the labor involved in researching, co-authoring, and identifying key constituencies.

In regard to how the archives informed their class discussion, most students easily connected the information in the memos to the class purpose of identifying stakeholders, communities, and problems. Students also wrote that the archives provided a "unique insight into the life of a senator," described "how Congress decides where federal resources go," and "showed the large amount of effort and cooperation needed to get a bill passed."

Students indicated an increase in comfort with archives with all twenty-one reporting that they felt comfortable to completely comfortable using archives. Several noted that they now know where to look to find archives and feel confident analyzing archival documents; however, many acknowledged that they need more practice searching for materials and using them on their own.

Analysis and Lessons Learned

Overall, the lessons were well received by faculty and students, and the archivist was invited to teach more sections of classes in the coming semesters. However, the lesson could be replicated and improved in the following ways.

Generally, this type of lesson takes a great deal of time to plan. After processing the files, the archivist prepped the activity through close reading

of the memos, chose the best materials for a narrative, and created a guiding worksheet and discussion questions, all of which took approximately one week. However, this lesson is easily repeatable across classes, with some minor tweaks, and the second time teaching took an investment of about one day to improve the assessment and to revise questions to incorporate the October 2017 CHIP news story.

This lesson worked equally well with undergraduate and graduate students. Despite the archivist's initial assumptions, the graduate and undergraduate students came to the activity with similar levels of archival knowledge, vocabulary, and familiarity with the legislative process. Undergraduate students seemed less knowledgeable, or at least asked more questions, about congressional services, such as the Congressional Research Service and the Congressional Budget Office, which were mentioned in the memos. Both were equally surprised to learn that members of Congress have extensive staff with expertise and that these individuals heavily influence policy.

To better structure the lesson, two areas could be improved. First, the archivist will include more supporting documents, such as newspaper clippings, to aid students in filling in gaps of information and to put the memos into a broader context. Second, the archivist plans to continue working on the final assessment. The reflective assessment at the end of the undergraduate lesson was short, mostly open ended, and anonymous and allowed students to reflect on what they learned and how it related to their class discussions. In consultation with faculty, the questions can be restructured to measure different outcomes.

A few students pointed out that they felt the archivist had done the hardest part (finding the materials) for them, and they wanted more practice in identifying and retrieving materials. This type of search activity in the archives can be rewarding and significantly improve students' archival literacy, but it is time consuming and does not necessarily fit within the intended outcomes of this lesson. This activity serves to orient students to the types of materials that can be found in archives and might be used in the future to scaffold a larger research project.

This lesson is replicable using congressional memos on any policy topic. Repositories with the papers of state legislators and governors will likely find similar materials (e.g., memos, press releases, and correspondence) that can be used for instruction about policy making at the state level or about federal and state government interactions in policy creation and implementation. Furthermore, the lesson easily could be adapted with materials from interest groups, constituents, and activists to investigate their roles in the policy-making process.

Conclusion

This case study shows how legislative staff memos found in congressional archives can be used to engage students at both the undergraduate and graduate levels in disciplines that typically are not frequent users of archives. The instruction exercise introduced students to basic archival principles, the use of primary source materials, and important civic lessons. Any archives can replicate the activity with similar materials, regardless of policy topic, to instruct students about the legislative process, building constituencies of support, leadership, and communication strategies. Using basic assessment tools, the archivist was able to gauge student comfort levels with using archival materials, as well as the ways in which students connected the instruction exercise to course objectives. Finally, this type of instruction exercise creates important, and lasting, partnerships with faculty and aids in demonstrating the importance of archives to student learning.

Appendix A

Understanding the Children's Health Insurance Program Using Congressional Staff Files

Group Worksheet

1. To whom is the memo addressed?
2. Who authored the memo?
3. What is the author's position on the staff?
4. On what date was the memo written?
5. Are there attachments or additional tabs, if part of a briefing book?
6. What is the subject of the memo?
7. What kinds of information does the author provide? What are the sources of information?
8. Write a summary of the key message(s).
9. Does the memo identify stakeholders? Who are they?
10. How does the staff recommend engaging with the stakeholder(s)?
11. What actions does the author recommend taking?
12. How does the author communicate the importance of the subject?
13. What factors and/or actors are influencing decision making?
14. What is the desired outcome(s)?
15. Does the memo recipient provide any feedback? If so, what feedback? How can you tell?
16. Is there any information missing in the memo?
17. What questions do you have after reading the memo?
18. How does the topic of the memo relate to current policy and political conversations?

Appendix B

Opening Questions

1. Have you used archives before? If so, what types of materials (e.g. newspapers, photographs, rare books, etc.)?
2. On a scale of 1–5, how comfortable do you feel using the archives? (1=Not at all, 5=Completely comfortable)

   1 2 3 4 5

3. What do you hope to learn today?

Appendix C

Reflection

1. What did you learn about the legislative process and policy creation that you didn't know before? Include materials or new vocabulary from class as examples in your response.
2. How do the archives you examined inform your class discussions?
3. After completing this exercise, how comfortable do you feel using archives? Why?
   (1=Not at all, 5=Completely comfortable)
   1 2 3 4 5

Notes

[1] Christopher J. Prom and Lisa Janicke Hinchliffe, *Teaching with Primary Sources*, Trends in Archives Practice series (Chicago: Society of American Archivists, 2016), 1.

[2] Elizabeth Yakel and Deborah A. Torres, "AI: Archival Intelligence and User Expertise," *American Archivist* 66, no. 1 (2003): 51–78.

[3] Barbara Rockenbach, "Archives, Undergraduates, and Inquiry-Based Learning: Case Studies from Yale University Library," *American Archivist* 74, no. 1 (2011): 297–311.

[4] Elizabeth Yakel and Doris Malkmus, "Module 9: Contextualizing Archival Literacy," in *Teaching with Primary Sources*, Trends in Archives Practice series (Chicago: Society of American Archivists, 2016), 35.

[5] Association of College & Research Libraries, "Framework for Information Literacy for Higher Education," February 2, 2015, http://www.ala.org/acrl/standards/ilframework.

[6] Prom and Hinchliffe, *Teaching with Primary Sources,* 10.

[7] Association of College and Research Libraries Rare Book and Manuscripts Section–Society of American Archivists Joint Task Force on the Development of Guidelines for Primary Source Literacy, "Guidelines for Primary Source Literacy: Final Draft," Summer 2017, https://www2.archivists.org/groups/saa-acrlrbms-joint-task-force-on-primary-source-literacy/guidelines-for-primary-source-lite-0.

[8] Peter Carini, "Information Literacy for Archives and Special Collections: Defining Outcomes," *portal: Libraries and the Academy* 16, no. 1 (2016): 196.

[9] For a discussion of numerous civic education studies dated 2000–2012, see American Council of Trustees and Alumni, "A Crisis in Civic Education," January 2016, https://www.goacta.org/publications/a_crisis_in_civic_education.

[10] Campaign for the Civic Mission of Schools, "Guardian of Democracy: The Civic Mission of Schools," 2011, http://civicmission.s3.amazonaws.com/118/f0/5/171/1/Guardian-of-Democracy-report.pdf.

[11] Edward M. Kennedy Institute for the United States Senate, "Edward M. Kennedy Institute for the United States Senate 2016 National Civics Survey Results," 2016, https://emki-production.s3.amazonaws.com/downloads/64/files/EMK_Institute_Nat._Civic_Survey_Results.pdf.

[12] ACTA, "A Crisis in Civic Education," 1, 3–4.

[13] Campaign for the Civic Mission of Schools, "Guardian of Democracy: The Civic Mission of Schools," 16–18.

[14] Scott A. Frisch, Douglas B. Harris, Sean Q. Kelly, and David C. W. Parker, *Doing Archival Research in Political Science* (Amherst, N.Y.: Cambria Press, 2012), 1–32.

[15] WVU Today, "Honors College Names Faculty Fellows to Develop Innovative Courses," March 16, 2017, https://wvutoday.wvu.edu/stories/2017/03/16/honors-college-names-faculty-fellows-to-develop-innovative-courses.

ABOUT THE AUTHOR

Danielle Emerling is assistant curator and congressional and political papers archivist at the West Virginia & Regional History Center at West Virginia University Libraries. She holds an MLS with an archives and records management specialization and an MA in history from Indiana University Bloomington. She has served as chair of SAA's Congressional Papers Section and is the treasurer for the Association of Centers for the Study of Congress.