Instruction Consultation for Archives Visits: Why No One Talks About It, and Why They Should

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ABSTRACT

Instruction consultation, the process of negotiating a lesson plan with an instructor, plays an important part in the success or failure of a class visit to an archives or special collections library. However, the subject is rarely discussed in the scholarship. This lack of scholarly conversation mirrors and perhaps indicates the dearth of substantive dialogue many archives educators have with instructors during this process. Merely assenting to requests without engaging the instructor to confirm or clarify them can lead to a misunderstanding of the instructor's (and thus the students') needs. This article posits four challenges to productive communication and collaboration with instructors: the recent shift in archives education to active learning; the difficulty expert researchers have understanding the needs of novices; the complex nature of research requests, as exemplified by the reference transaction; and the uneasy relationship between librarians/archivists and teaching faculty. It examines relevant existing scholarship, arguing that a better understanding of these factors helps archives educators think more critically about their practice and formulate strategies for communicating more fruitfully. It also offers points of future research.

KEY WORDS

Archives instruction, Instruction consultation, Collaboration, Faculty, Primary source literacy

Every class visit to an academic archives or special collections library involves a consultation between an instructor and an archivist or librarian. It may take any number of forms: through an email exchange, a web form, or a phone call; in a chance interaction, a drop-in visit, or a planned meeting. Unfortunately, the subject is rarely discussed in the archives and special collections literature—nor, indeed, in academic library literature. This is perhaps reasonable: such one-on-one transactions can be hard to generalize, not only those between different instructors making requests but also between the different librarians receiving them. For archives educators,[1] the problem is even more acute. Instructors are generally less familiar with what archivists do and how a visit might help them meet their pedagogical goals. Archives educators themselves may struggle to establish programmatic outcomes and measures due to the variety and frequent novelty of the courses and their reasons for visiting the archives. Instructors may not even be thinking about it in those terms—as skills building—but in terms of particular activities, subjects of discussion, or materials to be examined. Beyond expressing the need, they may not understand it particularly well. The archives is a specialized information context; some instructors will be less than familiar with this kind of research, while others will be very well versed—so much that they have a hard time anticipating questions and confusions, whether theoretical or practical, from the novice researcher.

While the literature scarcely explores instruction consultation—it is typically confined to pragmatic discussions in library instruction guidebooks[2]—it is a vital subject for discussion, especially in the archives and special collections context. The literature's silence on the matter is telling, and I argue it reflects the unwillingness of many archives educators to assert themselves with faculty to clarify, refine, or even redirect potential activities. For instance, in an account of her institution's developing archives instruction program, Suzy Taraba notes that they began with a show-and-tell approach, and it is still the most common one used.[3] However, she then admits that while "tried and true," this method is not always the best for engaging students, and she goes on to describe an array of active learning activities that her repository can and does offer.[4] Have these been rejected by instructors, or were they not suggested in the first place? In either case, why? In lieu of more focused scholarship on the matter, several areas of the existing literature can help archives educators recognize both the roadblocks to establishing clear goals and useful activities for a class visit and the consequences of not overcoming them. This discourse can also, then, point toward potential correctives, or at least to areas of further intentional exploration. This article explores four main challenges to the interpersonal communication commonly referred to as instruction consultation, examining and reflecting upon applicable literature on 1) active learning in

archives instruction, 2) student research needs, 3) reference consultation, and 4) the attitudes of faculty toward various academic literacies and librarians and archivists as peers.

Literature Review

In 1999, the Society of American Archivists (SAA) published its "Guidelines for College and University Archives," which largely does not address education.[5] It does, however, provide the general directive that archives should be an "educational laboratory" for students to learn about both historical concepts and archival research procedures. Despite the relative quiet of the SAA regarding instruction activities, this concept of archives as places of experiential learning has taken hold. In 2001, Marcus C. Robyns argued that archivists should think beyond just helping students learn how to use archives, to consider their role in fostering better document analysis and overall critical thinking skills, helping the institution meet its general education aims.[6] Two years later, Elizabeth Yakel and Deborah A. Torres focused on how to make researchers more archives literate by attempting to define "best practices for user education to support archival intelligence."[7] Yakel and Torres envisioned an education model centered on comprehensive archives research skills rather than the current approach geared toward orientation to one's own repository, often only for a specific project.[8] To meet these simultaneous calls—for better, more transferable archival training and broader, savvier use of archives in general education—required rethinking the role of archives educators. In 2008, Doris Malkmus noted that much effort was being spent in making materials more accessible, while archival instruction was "perfunctory," still geared toward tool use rather than the development of research skills.[9] The next year, Peter Carini offered a potential reason for this: not only were archivists not trained as teachers, they were only beginning to change their conception of themselves as "neutral gatekeepers" of materials who should not be helping users shape their research.[10]

Though much has changed in archives educators' self-conception in ten years, and while the growing emphasis on service to general education has been well documented,[11] concerns abound regarding student understanding of archives as archives. Todd Samuelson and Cait Coker argue that even the library and information studies (LIS) field in general tends to compartmentalize or outright neglect addressing the archives or special collections instruction context; for example, the Association of College and Research Libraries (ACRL) did not really address primary sources in its now-superseded "Information Literacy Competency Standards for Higher Education," which was a missed opportunity for both instruction librarians and archives educators.[12] Little has changed with its replacement, the "Framework for Information Literacy for

Higher Education," which does not explicitly mention primary sources at all.[13] Some point to this oversight as proof of the special nature of archives literacy, suggesting that it requires its own learning outcomes. In 2015, J. Gordon Daines and Cory L. Nimer were among those dismissing the ACRL "Standards" as both too narrow and not particular enough, mentioning primary sources only to differentiate them from secondary sources, not to teach students how to find and use them.[14] In recent years, the conversation has largely turned from concepts of archival literacy or Yakel and Torres's *archival intelligence* to the notion of primary source literacy, drawing archives education closer to the library model of information literacy training, in shape as well as in substance. For example, though Daines and Nimer place archives training under the broad umbrella of cultural heritage literacy, they frame their discussion as one of primary source literacy competencies.[15] However, this reformulation has not ended the call for standards developed by and for archives educators. Carini called the ACRL's document unhelpful, but not because it is inherently irrelevant. After pointing out particular mentions of primary sources, Carini argues, "Almost all the other standards, indicators, and outcomes have relevance to primary source research at some level, but specific descriptions of the unique challenges these materials pose to the user are missing."[16]

In 2017, the "Guidelines for Primary Source Literacy" were created by a joint task force comprising members from both SAA and the Rare Books and Manuscripts section of the ACRL. The "Guidelines" are "in the spirit of" the ACRL's "Framework," which they say is a "useful companion" in instruction activities in academic archives and special collections. The documents are similar in approach and cover some of the same territory, but ultimately the "Guidelines" offer a distinct pedagogical apparatus. They establish learning objectives for finding primary sources, making sense of them, viewing them critically, and using them in research.[17] In 2016, SAA published *Teaching with Primary Sources*[18] and made it the "One Book, One Profession" selection for that year, demonstrating a commitment to what is now a solid and broadly accepted understanding of the goals of archival education. As was the case in the LIS field, collaboration with instructors has become paramount in the discourse; for example, Malkmus argues that inasmuch as assignments typically drive student use of archives, instructors are "key figures in understanding and meeting student needs."[19] According to Ellen D. Swain, integration with the curriculum can be "worthwhile and rewarding" if the archivist and instructor are on the same page about their goals.[20] Unfortunately, in Swain's account of how these partnerships work, which is fairly typical even among practical guides, the actual mechanisms for establishing such partnerships—and the challenges inherent—do not enter into the picture.

Discussion

Multiple factors come into play in the often brief but foundational communication referred to as instruction consultation. Breakdowns sometimes arise from the language or particular ideas presented, but they just as often stem from underlying assumptions and perceptions. Even when not problematic, requests for class visits to an archives or special collections library are generally complex, which is part of why talking about them in an abstract fashion may seem difficult, just as difficult as collectively characterizing the scope of instructors' needs and desired activities. (Consider that some of those purposes for a visit—an orientation, a tour of the space, an encounter with a particular item or collection—are only marginally instructional yet may be valid.) Still, the sources of potential problems can be generalized: faculty may be unaware of the archives' educational role and services, they may not understand what their students need in the way of support, and they may not present their requests clearly. But archives educators may also find it difficult to initiate a real conversation about the visit—to correct misconceptions, clarify goals, or suggest useful activities—and thus turn a potentially one-way communication into a productive negotiation. Understanding these realities, which intersect and further complicate one another, is a good starting point for thinking critically about one's instruction program and how relationships between archives educators and instructors shape class visits.

Conception of Archives Pedagogy

In noting the challenges in internal librarian-archivist partnerships, Samuelson and Coker argue that librarians have misconceptions about the work of archivists, assuming it to be focused on artifactual curiosities, something merely curatorial rather than potentially instructive.[21] This can have profound and unproductive consequences: "If we are not perceived and introduced as teachers and facilitators, but are only viewed as custodians of specialized and interesting objects, special collections materials run the risk of being seen as elite indulgences rather than as accessible working collections."[22] If archives educators are viewed as such internally, how much more might instructors misunderstand them? A look at how these attitudes have changed within the profession reveals gaps in understanding that yet exist and the kind of re-visioning that may be necessary for collaborators like librarians to teaching faculty.

Over the last decade and a half, archives educators have attempted to demonstrate that an archives visit can accomplish more than engendering a love of history or establishing the scope of the archives. In 2006, Pablo Alvarez

wrote about his own practice in response to a listserv query about showing rare books to undergraduate classes. As he characterized the discourse, some respondents still advocated that students learn comprehensively about the archives before ever setting foot in it, but others suggested the archives educator should work directly with less-than-expert students in the archives, even though it meant taking on what Alvarez called the "challenging and critical roles as both teacher and interpreter of the collection."[23] At this point, Alvarez viewed such an egalitarian approach as the new normal, contrasted with an earlier period when close contact with materials was reserved for advanced students at certain types of institutions.[24] Though Alvarez was still working in a presentational mode, it wasn't long before others advocated hands-on activities. A 2008 study by Julia Gardner and David Pavelich on teaching with ephemera highlights why the "greatest hits" approach, showing only the amazing and the canonical, is less effective than using the ordinary to spark analysis and historical understanding.[25] In addition to providing an environment in which to develop critical thinking and information literacy skills, they encourage discussion and view archives educators as the facilitators of that conversation.[26] In a study of student reactions to a collaborative project with a history course, Michelle McCoy argues that teaching from archives counters anxiety, reinforces good archival research practices, connects students to history, and integrates these materials into the curriculum.[27] Merinda Kaye Hensley, Benjamin P. Murphy, and Ellen D. Swain looked at student experience of archives instruction through Yakel and Torres's archival intelligence model, and their postinstruction interviews manifested several key themes. Many pointed to the impact of archives instruction on learning and literacy, especially students' attention to critical analysis of documents as well as the transferability of new knowledge and skills to their specific disciplines.[28]

In addition, archives educators have reported on their engagement with learning theory and pedagogy, demonstrating that they make substantive, informed choices in their teaching that are potentially familiar to teaching faculty or can at least level the playing field. Silvia Vong explains that a constructivist approach helps "demystify" archives for students and encourages them to take charge of their own learning and use of materials.[29] Vong also argues that this strategy, which sees archives educators acting as facilitators for student-created learning experiences, would enable them to shift their perceived role from "gatekeeper" to "teacher."[30] Barbara Rockenbach found that inquiry-based approaches in archives can help archives educators both integrate with the curriculum and improve students' experience.[31] She found that outreach and focused course consultations are indispensable to the process; while instructors may find an orientation or "treasure tour" approach perfectly adequate, they "often don't realize that librarians and archivists can help them design

interactions with primary sources based on their course learning objectives using active learning techniques that ask students to engage deeply in an interpretive activity."[32] The inquiry-based learning approach used by collaborators David Mazella and Julie Grob led to students modeling "the work that scholars actually do," giving them a better understanding of information literacy.[33] In developing the course, both authors had to revise some of their shared conceptions of what an archives educator could contribute to the course; for example, Grob, the special collections librarian, found herself providing suggestions on assignments that were not related to these library visits and taking on more standard information literacy work such as teaching students how to find secondary sources in relevant databases.[34]

While instances of such productive collaboration abound, a converse example illustrates the continued systemic misunderstanding of the archives educator's role. Elizabeth Chase, a graduate instructor writing of her archives-based class, shared her perspective on collaboration with the archives in *Past or Portal? Enhancing Undergraduate Learning through Special Collections and Archives*. Her chapter is worth quoting at length:

> Prior to planning assignments, however, an important first step in designing any archives-based course is to meet with the archivist(s) who will assist your class. Ideally, the archivist should be a part of the syllabus and assignment planning process, as he or she will be familiar with those collections best-suited to undergraduate research. The archivist will also know when the reading room may be busiest and can suggest scheduling due dates for periods when Research Services staff will have more time to work with beginning researchers. Ultimately, taking the time to work with staff prior to finalizing your syllabus or assignment will help to ensure a productive experience for your students. Last but not least, be sure to keep the archivist informed of your students' research experience and their projected needs.[35]

In many ways, this is ideal, especially the focus on the archives educator's involvement during syllabus planning, attention to the archives' resources and time, and insistence upon cooperation. However, the partnership is not that of equals; the archivist is regarded as a helper, choosing useful collections and scheduling sessions. Later, Chase demonstrates the persistence of the "treasure tour" model as she suggests getting the archivist to show off favorite items, both to "highlight collection strengths" and to "see the archivist's excitement."[36] These are valid functions and actions, but they are not the limit of what archives educators can—and in many cases should—be doing. She reveals some awareness of this when suggesting that archivists will be able to choose materials "best-suited to undergraduate research" and that keeping archivists abreast of the students' ongoing "research experience" and "projected needs" is good. But what does "best-suited" mean, and what are those needs?

Understanding of Student Needs

Instructors are experts in their disciplines, and their role is to impart the knowledge of these disciplines to their students, whether for a single class or as a part of students' longer journey toward becoming experts. They teach students to be scholars, to learn not just content but how to research. Disciplines have different means of imparting this procedural wisdom; unfortunately, the discourse reveals that many expert researchers do not see research skills, even in a disciplinary context, as something that can be taught systematically. And, when they do view information literacy and research proficiency as skills that can be taught, their view of the process—and the aegis under which it is best carried out—differs greatly from that of the library and archives fields, which can also create barriers.

Much research has been done on the information-seeking behavior of novice researchers and undergraduates in particular, but measuring how well instructors understand this process and determining how they mitigate the gap caused by their expertise from a pedagogical standpoint are more difficult. Gloria J. Leckie sought to understand the way undergraduate students conduct research, finding the following factors central to the development of their methodology under faculty instruction: faculty as expert researchers, assignment design and student limitations, faculty assumptions, and the in-class experience.[37] These factors compound each other; for example, that faculty are expert researchers influences their assumptions about learning, which shapes their assignment creation. One especially insidious supposition is that students even have strategies for seeking scholarly information and, if they do not, that they will develop them as they go along.[38] Leckie argues that while students do have strategies for finding information, they are not "organized along the lines of the expert scholarly model" and function more as coping mechanisms, approached with little of the patience and commitment the process requires.[39] Overall, she found that faculty have not been undergraduates in a very long time, so they do not remember the steps they took along the path of becoming effective, confident scholars. This creates dissonance between what they expect and what students are able to accomplish.[40] Subsequent studies have largely borne this out. Claire McGuinness found that the sciences and social sciences faculty she studied already assume they are contributing to student growth in information literacy, in part because they believe these skills to be acquired organically over time: "There was a tacit assumption among faculty that students would somehow absorb and develop the requisite knowledge and skills through the very process of preparing a piece of written coursework, and by applying the advice meted out by their supervisors."[41] McGuinness observes that while faculty assumed students will become information literate eventually, they could not explain

precisely how, so the notion of intentional information literacy training was not, then, a priority for them.[42] Shelley Gullikson asked faculty directly about the ACRL's "Standards," finding little agreement about when outcomes should be met beyond the first year.[43] That suggests that establishing procedures and a division of labor for courses at higher levels and for outcomes addressing more advanced skills—which would include the discovery and integration of primary sources—may be more difficult, inherently or in practice.

While McGuinness and Gullikson focused on faculty perceptions of information literacy development, Alison J. Head looked at the research process of humanities and social science majors, hoping to discover the precise ways in which instructors and students understood the process differently. She found that discerning instructor expectations proved to be the most frustrating part of the process for students.[44] Analysis of assignment handouts showed that, on the whole, they neither offered much help in planning research and creating a paper of high quality that adheres to a grading rubric, nor did they explain where to find resources.[45] In this context of confusion, students found it hard to understand their information needs and to evaluate sources as potentially useful.[46] This indicates that either faculty are unaware of how much help students need to make sense of even secondary research, or that they are not equipped to provide it. Assuming primary research is less familiar, to students and in most cases to their instructors, the gap for archives and special collections instruction is even wider. In one of a very few studies of archives users' behavior, Wendy M. Duff and Catherine A. Johnson's interviews with advanced historian researchers exposed several complex activities common to their work: orienting to a new archives, looking for known items, contextualizing knowledge, and determining what materials are relevant to their needs.[47] However, Duff and Johnson note that historians are still likely to describe their work as relying on serendipity, on "accident," rather than resulting from the "deliberate tactics of the expert researcher."[48] Not being aware of their own processes creates a barrier to teaching them to others.

The degree to which expert scholars can understand student research needs or meet them is difficult to determine, and it is likely only part of the issue. Recent studies focus less on the notion of instructors being right or wrong about information literacy acquisition and more on their simply having a different perspective. Jonathan Cope and Jesús E. Sanabria found that instructors tend to see information literacy as "embedded" in disciplinary learning, that is, "entwined with exposing students to the fundamental literacies of their discipline."[49] They conclude that faculty are deeply concerned with information literacy but generally express those ideas in the rhetoric of their own fields of study.[50] Similarly, Sophie Bury's study of faculty expectations of student abilities found that faculty see information literacy as "fundamentally interconnected

with other types of twenty-first century literacies, including reading for comprehension, critical writing skills and other learning skills."[51] They viewed both teaching faculty and librarians as having major roles in this development, and, while a good number of them cotaught or even turned over information literacy instruction to librarians, Bury is not clear on how faculty imagine a division of labor.[52] On the whole, faculty want and need students to become more information literate, but their attempts to foster these skills can be hit or miss.

Much of the library literature applies to the archives context, but the extraordinary nature of archives and the less familiar world of primary sources call for additional specialized scholarship. Wendy Duff and Allyson Fox explored archival user behavior via the observations of reference archivists, finding that student users are far less equipped to approach archival research than are expert users, including faculty.[53] Reference archivists expressed that students often do not have enough "contextual knowledge" to actually carry out their research, leaving archives staff in the position of providing that for them.[54] If faculty do not attend to this reality—that one must know the context of the information need as well as understand how to use the archives and that their students may not be prepared in this way—they will plan difficult assignments or set up unfruitful visits to the archives. In a study of student experiences of archival research, Xiaomu Zhou observed such problems with preparation related to topic choice and source selection.[55] Notably, the instructor had unreasonable expectations of both the visit and the assignment: "I was hoping that from an immersion in an archive, they would think of a question they want to ask of these sources, and they would explore that question through the source materials."[56] In short, the instructor was banking on something organic, indicating that teaching primary source research must overcome the same learning-by-exposure model noted in the LIS literature. A particular student comment demonstrates the ineffectiveness of this strategy: "I just wish we would have more class time to talk about some of the issues and focus on some activists during that period before we had the orientation, because it was like you were supposed to be looking for information, but information on what?"[57] This student spoke of lacking historical context, but implies confusion about the research process itself, specifically, how to strategize a search of primary sources based on a topic. The instructor's reaction to the visit also revealed that she did not know precisely what was needed during that visit and that only afterward did she perceive the need for general orientation to this particular archives and to archives research in general.[58]

One big-picture misunderstanding of student needs relates to ignorance of what archives educators do. In discussing the concept of archives as "educational laboratories," Anne Bahde points out that discussions based on this metaphor leave out the vital element of time: "Within the hands-on lab,

students progressively practice the skills required to succeed in the discipline over a series of sessions, learning the cognitive tools of the discipline in a structured, guided way."[59] This is hard to do within an archival setting, she argues, because rarely are enough sessions given to help students develop their primary source literacy skills.[60] Mazella and Grob found multiple sessions are key to their students developing primary source research skills, but it did not happen through mere exposure.[61] Given their inquiry-based approach, Mazella's literature class sessions were flexible, addressing student interests and needs; the authors observed that the research process "did not proceed linearly but followed, instead, a spiraling, recursive, piecemeal process in which they gradually integrated the material into their speech, writing, and thought through successive returns."[62] However, Grob's library sessions were still quite structured to better help students engage in the process, including activities on document analysis and key word development strategically placed in the syllabus and designed to increase in complexity.[63] Overall, instructors in the humanities want students to learn to think and work like scholars, but they may not realize an archives is an ideal place to do this, the archives educator a natural partner in this aspect of their pedagogy. More likely, they do understand the need in some real way, either clumsily, hoping to foster research skills through mere contact or trial-and-error or, as archives educators themselves do, inviting structured training rather than simple exposure. Some, however, are simply not able to express this very specifically or clearly.

Articulation of Session Goals

In their discussion of the nuts and bolts of primary source education, Tamar Chute, Ellen Swain, and Sammie L. Morris conclude that while some instructors can be reticent to collaborate, "most negative classroom experiences occur because of miscommunication, lack of communication, or poor communication."[64] Without analyzing a corpus of instruction-related missives, it is hard to enumerate specifically the types of communication problems that plague these transactions. The adverse outcomes of poor communication, however, are clear. In that way, consulting with an instructor is like the challenge of doing reference work, an area of practice that suggests potential strategies for this task as well. Admittedly, obvious differences exist between an instruction request and a reference request. A distinctly difficult power dynamic is at work because of the research level of the asker as well as his or her position within the request scenario. And the scenario itself is, of course, more complex: rather than focusing on guiding a user through the research process in a single instance, it operates on a meta-level, in the end contributing to the instructor's plan for guiding others through the research process. This means such queries are also

often quite literally vicarious reference consultations—for multiple researchers. Instructors may simply not know quite how to approach this complicated rhetorical situation productively. Reference interviews are messy transactions, rooted as they are in the nonlinear, iterative, highly individualized process of doing research. They deal in unstructured, often nascent problems and elicit questions likely to be tangled or vague or even misleadingly plain. While further research would be required to determine the precise overlap between the literature on reference consultation and instruction requests, it is possible to rationalize the one as a potential model for the other, at least in some aspects, and to begin to explore what lessons one can already learn in that arena—if nothing else, why careful critical attention to the process is so important.

In 1992, Carolyn A. Heald wrote a scathing indictment of the then-current archival attitude toward reference, saying it was "most often regarded as secondary, a necessary evil, a diversion from the principal duty of collecting and preserving the sponsoring body's documentary heritage."[65] She further saw an "adversarial" relationship between archivists and users, especially less experienced users.[66] Richard J. Cox echoed her call for more attention and research in his examination of studies in the field through the early 1990s. He argued that, in lieu of solid archives-focused research on reference work, archivists should look to library studies, which could "potentially reveal more than is known about use in archives at present."[67] Linda J. Long also argued that archivists needed to both "adopt" and "adapt" the strategies of librarians to their own setting.[68] While this tactic was and still is useful, archivists who call for more research into the reference process, including the reference interview, often insist on distinguishing it from reference in the "regular" library setting for a host of good reasons. Mary Jo Pugh, for example, notes, "The most significant difference is that reference encounters in libraries are usually short and voluntary, each devoted to a single question. In contrast, reference transactions in archives are more likely to be substantive, obligatory, and continuing."[69] On a very basic level, reference transactions in an archives or special collections library have a different purpose: users must interact with staff to access materials, at times to know the contents of a particular collection in the first place. This stricture and the noted depth of those interactions are due to the collections themselves. As Frances O'Donnell pointed out, archives contain "material that would never be found in the library": documents reflecting a lived experience rather than designed to impart information.[70] These items require arrangement systems that might be wholly alien to users, even those well versed in secondary research. Wendy Duff and Allyson Fox found that archives reference workers devote most of their time to helping people learn how to search for information, especially how to use finding aids.[71] Focusing on these learning objectives is tempting. In 1997, Susan L. Malbin looked at the two then-current emphases of scholarship on archives

reference, classing them as *materials-centered* or *user-centered*, both of which focus on improving retrieval and are based on the false assumption that users know how to seek information in the first place.[72] She argued that the profession needed to put more emphasis on the reference interview and rethink reference in general, including subjecting archivists to more, which in some cases is to say any, reference training.[73]

Good reference work, in libraries or archives, involves discerning the patron's real questions or real needs, and understanding such transactions as interpersonal communications with intellectual, emotional, and social dimensions, and as negotiations between two equal parties.[74] This process is necessary for transforming reference into the teaching opportunity James K. Elmborg and others[75] urged it to become. But by no means is this an easy task, especially as the intellectual dimension gets more complicated. Anne M. Fields describes the particular challenge of answering ill-structured reference questions, which have "indefinite starting points, multiple and arguable solutions, and unclear maps for finding one's way through information."[76] She also discusses the types of problem solvers who may face these questions, for example, novices: "Unlike experts, novices are hampered in their problem solving by a lack of domain knowledge and a lack of practice solving problems within the domain. Furthermore, if they have some domain knowledge they may be so overwhelmed by its quantity that they cannot determine what is or is not relevant."[77] Much of Fields's commentary on the novice problem solver applies to nearly all student and some faculty users of academic archives. Fields uses the term *subexpert* to denote those with experience in a related domain, which puts them ahead of intermediates but behind experts.[78] Except in the case of historians and others well versed in primary research, instructors—those guiding students through the process—are arguably subexperts in archives. They will certainly be less expert than the archives educator.

If the literature on reference is any indication, this subexpert position is sometimes at the root of the articulation problem. Consider Pugh's description of archival reference: "Reference archivists quickly learn that the first question that researchers ask is usually not the real question, or that the first statement of need is not a full statement of need."[79] Their reasons for presenting veiled or incomplete needs are varied, as Long argues: "Ambiguity on the part of users is frequently rooted in feelings of uncertainty or fear of seeming ignorant. Researchers can be overwhelmed by unfamiliar research environments. Unsure of themselves, they do not know how to behave and may derail the interview simply because they do not know how to present their information need."[80] According to Pugh, derailments in the process frequently take the form of defensive strategies that warp the conversation: asking more basic or unrelated questions to test the waters, bluffing to avoid looking ignorant, framing

questions based on expected responses, concealing needs to avoid attention or suspicion, or bullying as a form of offensive defense for vulnerability.[81] In the context of instruction consultation, this may translate into instructors asking for less than they want or need or, conversely, something more complex; asking for what they think the archives educator can provide (potentially based on false assumptions or past experience); or disrupting their meaning with coy or dismissive rhetoric.

Beyond interpersonal and psychological concerns, Pugh explains that researchers unused to archives may simply fail to convert their incipient ideas into productive queries.[82] Long notes that a researcher's thesis is somewhat provisional during a reference encounter, and it will certainly evolve throughout the research process, necessitating more interactions with the archivist.[83] The construction of a course can have many things in common with a research project, including a developing understanding of support needs and a shifting sense of purpose, particularly in courses built on archives research and generally driven by individual student research. Thus, all of these realities may come into play in instruction consultations, with the added complexity of 1) a subexpert requester who could have misconceptions and deploy less-than-effective or counterproductive communication strategies, who is 2) planning an archives encounter for a whole group of students, who are 3) generally novices or at least less expert, often because they are not just starting a project but are also not yet very good at research in general. This would be difficult enough assuming a level playing field between archives educator and instructor, but that cannot always be taken for granted.

Receptiveness to Collaboration

The fact that archivists and librarians still refer to the process of communicating with instructors as an "instruction consultation" highlights what it often is: a single interaction rather than the opening of an ongoing dialogue. Those who attempt to form more collaborative partnerships with instructors, particularly faculty, may find such a dialogue difficult because they either encounter resistance or anticipate it. The literature on faculty[84] behavior, *vis a vis* their relationship with librarians or archivists, can be disheartening. Much of it details or at least presupposes faculty ignorance or dismissal of the work of information professionals, especially surrounding information literacy as a concept. Other literature reveals faculty attitudes about librarians themselves, highlighting an unequal power dynamic that makes forming partnerships difficult. Whether real or imagined, whether one is conscious of it or not, this dynamic is part of the academic library ecosystem, and it shapes communication.

In an examination of successful librarian-faculty partnerships, Ruth Ivey found that librarians and academics value most highly having "a shared, understood goal,"[85] which will be established by communication but is ultimately tied to the attitudes of those involved. Those attitudes are founded in the nature of the relationship and, according to Ivey, both parties are aware of the roles they play: faculty pursue collaborations and depend on librarians to keep them going.[86] José O. Díaz and Meris A. Mandernach observed that faculty are apt to use the word "organic" to describe partnerships with librarians, as they most often seek out help for a particular project or assignment[87] rather than for bolstering their general research skills. Taken together, this depicts faculty initiating a point-of-need interaction, which only becomes more programmatic if nurtured by—perhaps even insisted upon by—librarians. In their sociological approach to understanding the relationship, Lars Christiansen, Mindy Stombler, and Lyn Thaxton found that organizational functions are key: faculty see themselves as creating while librarians are in a service role, something generally seen as less vital in any context, as well as subordinate.[88] (The issue of whether librarians do or should have faculty status themselves, of course, complicates this.) Even more damning, the general findings of Christiansen, Stombler, and Thaxton indicate that while both groups recognize the disparity, only faculty view it as problematic.[89] In essence, librarians need faculty far more than faculty need them; faculty find their worth measured by the mark they make on their discipline, librarians by the mark they make on faculty.[90] While collaborations are central to a librarian's work, to faculty they are "of little or no concern."[91] This would seem to all but guarantee an unequal relationship.

The LIS discourse has long been concerned with the so-called faculty problem and its role in creating tension between librarians and teaching faculty. In 1995, Larry Hardesty discussed faculty culture and its relationship to library efforts, pointing out one "paradox" especially germane to tensions surrounding pedagogy: "faculty members can view teaching as so straightforward that it requires no special training, and yet as so complex and idiosyncratic that mere training could never meet its extraordinary demands."[92] Once again, this dovetails with the idea that information literacy is both something one picks up naturally and something that cannot be taught outside of a specialized context. Along with the recognition of playing different institutional roles, faculty can actually feel threatened by librarians and their learning outcomes. As instructors of record, they risk more. Carolyn Caffrey Gardner and Jamie White-Farnham, a library instructor and a writing program administrator, respectively, writing of their own collaboration, observe that faculty can see librarians as infiltrators or usurpers, their interventions as an attack on the faculty member's academic freedom.[93] William B. Badke encapsulates a lot of these ideas in his fairly pessimistic summing up of the "faculty problem": "We

are locked within an environment in which discipline-specific instruction is the norm, professors cling to their turf, and the powers that be will release neither personnel, funding, nor curriculum space to enable a wider information literacy enterprise to take root."[94]

In 1999, Wade R. Kotter described relations between librarians and faculty as "strained, unfriendly, and even acrimonious."[95] Such poor relationships can lead to negative outcomes, including failure and attendant rounds of the blame game and reinforcement of negative stereotypes on both sides.[96] Is the relationship, then, doomed to imbalance? If so, is "faculty culture" to blame? Kotter admitted that many of the observations about faculty attitudes toward librarians upon which his generalizations were based are anecdotal,[97] which speaks to real experiences that may or may not be representative. I argue that most faculty instructors are not actually resistant to collaboration or desirous of limiting their collaborative work to a single request or a brief back-and-forth before the visit. As Yvonne Nalani Meulemans and Allison Carr point out, "a professor that is contacting a librarian seeking assistance and guidance in crafting a rich learning experience for their students will most likely enthusiastically engage."[98] It takes two to dialogue, and operating in a context with an especially negative faculty culture—even if it is simply perceived—could make archives educators reluctant to speak up. Acquiescing to poor requests is problematic, and it is just as revealing of archives educators as it is of teaching faculty. Meulemans and Carr explain that the problem can often be traced to avoidance of risk: "There is a great fear in pointing out flaws in an instructor's assignment or problematic request. That instructor could just say 'no,' or, worse, mistakenly conclude that working with the librarian is too complex, a waste of time, or unnecessary."[99] Beyond this, archives educators may simply have trouble asserting themselves as teachers, especially those who are new to that kind of self-conception. Only a decade ago Carini reported on the gap between what archivists want to accomplish—or, for some, the new role they felt "pressure or obligation" to take on—and what they are trained to do, or more accurately, what they are not trained to do.[100] As a consequence of either anticipating a poor reaction or lacking confidence in their roles and abilities, archives educators will react to requests in the way they believe they should, allowing them to be one-time—or worse, one-way—transactions.

What are archives educators' options when collaborating with faculty? Badke characterizes two unsuccessful approaches: acting as Friendship Evangelist, a weak position that leaves librarians dependent on faculty; or acting as Tactician, an aggressive alternative that may fail by overplaying its hand.[101] He advocates a more neutral approach that identifies middle ground: "Beyond helping faculty learn how to navigate the complexities of new information

tools, we are in a position to put ourselves forward as information experts who can help them with many aspects of their research."[102] But, like most of the literature on collaboration, these characterize an overall approach to finding and keeping collaborators, not handling specific encounters. Meulemans and Carr actually do address responding to instruction requests, as one's handling of them is at the heart of building good partnerships. For this reason, they call for absolute assertiveness, even at the risk of losing opportunities, lest a librarian become a mere "automaton that serves the needs of the faculty."[103] This means it is necessary to say no to "misinformed, unfeasible, and/or frustrating requests" from faculty for instruction.[104] Assuming this is the right approach, what kind of ideas should archives educators deny, truly harmful ones or those that are merely unhelpful? Meulemans and Carr argue that some faculty realize the library can be helpful but do not know in what way precisely; this ignorance, they concede, may be remedied by conversation.[105] Other professors are, in their estimation, less sincere, just attempting to fill a spot on the schedule or fulfill a departmental requirement; the authors assume they will respond negatively to any questions or challenges. In such cases, they argue that realizing the faculty member does not understand his or her effect "does nothing to reduce the feeling that the librarian's teaching expertise is being disregarded, dismissed, and disrespected when a professor makes such aforementioned requests."[106] This is true—arguably, as much for receptive instructors as for those who are defensive or acting in poor faith. To that extent, motivations don't matter, especially as Meulemans and Carr deem it important to engage in all circumstances.[107]

Whatever the reasons for the poor request, then, the fundamental argument of Meulemans and Carr is sound: getting beyond just saying "yes" is necessary to creating genuine partnerships. Díaz and Mandernach explain that real dialogue opens up possibilities: "According to some faculty members, relationships are strengthened when librarians push boundaries and go beyond the expectation of suggesting services and sources. Asking probing questions, adding new insights, and pushing the faculty member's research in new and unexpected directions show both thoughtful enthusiasm and personal commitment to the success of the faculty member and his or her project."[108] That project could very well be not an article or book but a course made up of dozens of its own projects. The alternative is continued behavior as "customer service," which will perpetuate archives educators' treatment as such.[109] A "customer is always right" attitude—fulfilling a problematic request without addressing its problems—fosters imbalanced relationships that cannot be easily fixed and moreover almost guarantees more problematic requests in the future.[110]

Future Implications and Further Study

In discerning how to begin addressing the aspects of the academic library and archives culture that contribute to creating or exacerbating the problem, a few important larger points emerge from the discussion above. First of all, given that some instructors believe that these skills cannot be taught directly or out of a disciplinary context, it is incumbent upon archives educators to find ways to inject this kind of training into assignments and other course activities to make them part of what instructors would recognize as the "normal process" of discipline-specific learning. Beyond one-shots and more sustained collaborations, archives educators can become more directly embedded in courses where warranted and feasible.[111] This would allow them to enter more directly into decision-making about assignments and the research training students need to complete them. Along those lines, it is also important to engage more with disciplinary perspectives on research and research-related literacies and to do so on that disciplinary turf. Scholars in history, literature, and other relevant fields do not frequently cite library and archives literature on this point,[112] but even this limited amount of interaction is not really happening in the reverse. Crossover pieces, where librarians and archivists find themselves writing for journals outside the field, tend to arise from collaborations with instructors, so they should consider documenting more of these relationships and projects, in general and especially for an external audience. Internally, archives educators can mine their knowledge and experience about instruction consultation and share them with the field in theoretical articles, but more likely in praxis-focused book chapters, discussions in conference papers and posters, and in more informal channels like blog posts and social media.

Without studies that focus on the archives and special collections context in particular, it is hard to know how many of these library instruction and information literacy findings apply to the work of archives educators. Further research should focus on comprehensively characterizing instruction consultation in the archives and special collections setting, such as through a broad survey of practitioners. It would be especially helpful to know who is driving these interactions, the instructor or archives educator, and whether they more often result from established collaborations and previous experiences or in response to targeted or general outreach. Other future study could tackle different aspects of the problem. A more focused literature review of non-LIS/archives sources could provide a better sense of how archives education is seen in the disciplines. In addition, interviews with collaborators may reveal adjustments to their perception of archives education and how those came about, not to mention establish the nature and extent of the problem. Syllabus analysis could provide a sense of how different instructors and disciplines incorporate

libraries and archives into their courses, although interviews or focus groups with instructors would undoubtedly be just as useful. More examination is needed of the existing discourse on disciplinary views of general information literacy or primary source literacy, particularly of studies driven by librarians and archivists, more of which are certainly warranted.[113] A broad survey of experiences or a localized discourse analysis could determine how often and how extensively communication may prove to be a barrier in these transactions, and in what way, such as the entanglement of intellectual issues and interpersonal misfires. It would also be helpful to more comprehensively map instruction consultation to reference consultation. Best practices and actionable strategies could be adapted from that literature, their applicability to the archives and special collections context tested qualitatively or quantitatively. Finally, the issue of faculty–archives educator relationships has not really been addressed specifically, as distinct from the general library context. This could be accomplished with a survey, but would ideally take the form of structured interviews with instructors.

Conclusion

Many factors make instruction consultation precarious in the archives context, all of which are easier to address if one recognizes them and examines them critically. Some are tied to misconceptions about archives or the needs of students. Others are about the way ideas are expressed in communication, actual meanings as well as inferred attitudes. The potential problems in any dialogue may originate with either party. When faculty take archives educators less seriously, they can be difficult to communicate with; but the perceptions of archives educators, specifically the assumption that instructors will not value or even understand their efforts, are potentially just as damaging. They can cause them to remain passive, to refrain from asking questions, to dismiss opportunities for improving an idea because they fear offending or threatening an instructor's turf or simply being wrong. They will then agree to instruction scenarios they know are not optimal or are perhaps less useful than they might be, or they plan visits with an understanding of goals nebulous enough to make a productive outcome impossible. Considering the question of the graduate student teacher or any particularly inexperienced instructor magnifies the problem. In addition to being more likely to misunderstand students' needs and to lack the vocabulary to express their misapprehensions, novice instructors are liable to suffer from imposter syndrome and to remain passive and agree with archives educators despite questions or concerns. Archives educators are all the more obligated, then, to intervene, even when the communication becomes

awkward. Such intervention not only benefits the current instruction scenario, it also establishes a good pattern for the future.

Notes

[1] This phrase is used hereafter to indicate archivists and archives librarians who provide instruction in an academic archives or special collections library.

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[80] Long, "Question Negotiation in the Archival Setting," 44.

[81] Pugh, *Providing Reference Services for Archives and Manuscripts*, 122.

[82] Pugh, *Providing Reference Services for Archives and Manuscripts*, 122–23.

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[103] Meulemans and Carr, "Not at Your Service," 80–81, 88.

[104] Meulemans and Carr, "Not at Your Service," 81.

[105] Meulemans and Carr, "Not at Your Service," 82.

[106] Meulemans and Carr, "Not at Your Service," 82.

[107] Meulemans and Carr, "Not at Your Service," 82.

[108] Díaz and Mandernach, "Relationship Building One Step at a Time," 279.

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[110] Meulemans and Carr, "Not at Your Service," 83.

[111] See, for example, Christy Fic, "Working as an Embedded Archivist in an Undergraduate Course: Transforming Students into Scholars through an Archival Workshop Series," *American Archivist* 81, no. 2 (2018): 290–309, https://doi.org/10.17723/0360-9081-81.2.290.

[112] Exceptions are few and far between. See these articles cowritten with librarians and archivists: Jonathan Buehl, Tamar Chute, and Anne Fields, "Training in the Archives: Archival Research as Professional Development," *College Composition and Communication* 64, no. 2 (2012): 274–305, http://www.jstor.org/stable/43490753; Jolie A. Sheffer and Stefanie Dennis Hunker, "Digital Curation: Pedagogy in the Archives," *Pedagogy* 19, no. 1 (2019): 79–105, https://doi.org/10.1215/15314200-7173771. See these articles written by English instructors who reference archives and LIS literature: Jessica Enoch and Pamela VanHaitsma, "Archival Literacy: Reading the Rhetoric of Digital Archives in the Undergraduate Classroom," *College Composition and Communication* 67, no. 2 (2015): 216–42; Wendy Hayden, "'Gifts' of the Archives: A Pedagogy for Undergraduate Research," *College Composition and Communication* 66, no. 3 (2015): 402–26.

[113] As in, for example, Sammie Morris, Lawrence J. Mykytiuk, and Sharon A. Weiner, "Archival Literacy for History Students: Identifying Faculty Expectations of Archival Research Skills," *American Archivist* 77, no. 2 (2014): 394–424, https://doi.org/10.17723/aarc.77.2.j270637g8q11p460; and the follow-up: Weiner, Morris, and Mykytiuk, "Archival Literacy Competencies for Undergraduate History Majors," *American Archivist* 78, no. 1 (2015): 154–80, https://doi.org/10.17723/0360-9081.78.1.154.

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