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"The Links in the Chain": Connecting Undergraduates with Primary Source Materials at the University of California

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"Monday through Friday I set out on a solo expedition to Westwood in search of any information that might be pertinent to my topic […] I wanted to immerse myself [in] as much primary information as possible so that I could reconstruct what happened, like a real historian […] I could not help but get a rush from feeling like some investigator out of a Bond movie."[1]

These are the reflections of a freshman at the University of California, Berkeley who spent her spring break absorbed in documents and case files at the UCLA Library Special Collections. Not only was her research experience—her first with primary source materials—obviously personally rewarding, but it also earned her an honorable mention from UC Berkeley's Library Prize for Undergraduate Research.

How did this student learn to "do history" so well and so early in her career? How do we inspire undergraduate students to use archives and special collections, and how do we support them in doing so? At the University of California (UC), we see several "links in the chain" that contribute to student engagement. This chapter focuses specifically on campus initiatives at UC Berkeley and system-wide projects at the University of California–California Digital Library (CDL) to illuminate a continuum of activities, namely:

- Online access to finding aids and digitized special collections materials
- A supportive undergraduate curriculum

- Dedicated reference librarians working in partnership with faculty
- A library-sponsored annual prize for undergraduate research

DRIVE FOR ONLINE ACCESS

Undergraduate students increasingly demand online access to library materials, and UC meets this need for special collections with the Online Archive of California (OAC).[2] Managed by the California Digital Library since 1998, the OAC website aggregates collection guides and digital objects from more than 150 libraries, archives, and museums at all ten UC campuses and throughout the state, thereby providing integrated access to collections dispersed among many institutions.[3] Institutional commitment at the system-wide level has enabled the OAC to evolve to meet the needs of researchers at all levels, including undergraduates. As of June 2010, it contains over 28,000 collection guides (EAD finding aids contributed by institutions and MARC21 records extracted from UC's system-wide catalog) and 210,000 digital objects (contributed images and texts).

Additionally, the OAC's companion interface, Calisphere, is a useful tool for undergraduates—especially those who are interested in digital reproductions rather than physical records.[4] Launched in 2006, Calisphere is a simpler "face" of the OAC that excludes the finding aids and presents many of the objects (images and texts) in topical and chronological groupings with short contextual es-

says. Although the primary intended audience for Calisphere is K-12 teachers, the interface and organization of the site has proved to be helpful for undergraduate students. The CDL is considering ways to better market and potentially further tailor Calisphere for undergraduate use.

The digital object collection in the OAC and Calisphere is strong in particular areas that support research by undergraduates. For example, the Japanese American Relocation Digital Archive (JARDA) contains approximately 10,000 digital images and 15,000 pages of electronic texts on the subject, from repositories across the state.[5] JARDA was launched after repositories reported being inundated with reference questions on the Japanese-American internment from students and researchers.[6] Today JARDA is the most visited part of Calisphere. It is popular among undergraduates in a range of fields, including history, sociology, ethnic studies, American studies, and others.

Other digital collections in the OAC and Calisphere that are especially germane to undergraduate research include an impressive regional history collection (currently approximately 20,000 images), hundreds of photographs of postwar West Coast suburban architecture, and almost 6,000 images of people and places in the Pacific Islands—just to name a few. These resources are made available through a combination of grants, partnerships, and the commitment of institutions to make their resources widely available.[7] Whether used exclusively online or as an entry point to the physical materials, the digital collection provides a rich resource for undergraduates throughout UC.

SUPPORTIVE CURRICULUM

"I found that when looking at sources in the library for a limited period of time, I had to think carefully about their significance to my paper; I had to decide the direction of my paper early on in my research in order to select and analyze sources."[8]

A supportive curriculum encourages undergraduates to use primary sources both online and in person. Several large undergraduate courses at UC Berkeley require assignments based on primary sources. These include the History Department's senior thesis classes (which enroll several hundred students each semester), American Studies classes, and classes in International and Area Studies that focus on world history. As scholarship becomes increasingly interdisciplinary, moreover, the use of historical evidence is permeating other fields. For example, in 2010 a Theater class developed a performance piece using the University Archives as its source material. Students in Architecture and Land Use Planning are also known for their use of archival collections. No doubt there are other courses and assignments, as yet unknown to the library, that also drive traffic.

Nevertheless, perhaps the most noteworthy example of supportive curriculum is UC Berkeley's History 7B (US History: from Civil War to Present), which makes learning with primary sources a priority for a mass of students with varying levels of interest in US history. History 7B enrolls approximately 600 students in 35 discussion sections offered each spring.[9] The course is so large because it fulfills several requirements, including American History for history majors and American Cultures (mandatory for all undergraduates).[10] It also has a tradition of being taught by "star" professors with compelling lecture styles. Accordingly, History 7B attracts a broad range of students, some of whom are future history majors, but many of whom will major in the sciences or engineering.

In addition to attending lecture and discussion section, in which the interpretation of sources is consistently modeled, every student is required to write a ten-page research paper based on the analysis of a set of primary sources.[11] While the nuances of the assignment may vary by course section, one feature is ironclad: students are expected to read deeply in a body of primary historical material and

interpret it using skills taught in lecture and section, without referring to historiography or secondary research. One of the main goals of the assignment is to motivate students to develop arguments and draw conclusions from the source material itself, rather than find sources that support pre-established arguments. As one graduate student instructor states:

> I'm mostly interested in the students coming away with an idea of what's out there in the source base and how to find it. I'm trying to push the idea that they will arrive at a question and then a thesis by browsing through the sources rather than going into the sources looking to substantiate a hypothesis that they've already formed.[12]

The result is very high undergraduate use of special collections at UC Berkeley. Even while students are now able to discover many special collections online through the OAC and Calisphere, they still use The Bancroft Library, UC Berkeley's primary special collections library, heavily for in-person research; undergraduate students, many of them from History 7B, represent a remarkable 30 percent of its users. Students also visit other repositories, at UC Berkeley and beyond, to dig into the rich collections they find online. For example, the student quoted at the beginning of this chapter discovered collections housed at UCLA that she proceeded to research during a trip home to the Los Angeles area.

While each History 7B discussion section has a theme, and many are devoted to specific collections, the potential topics for the class papers are virtually unlimited, given the long chronological scope of the class (1865-present). Choosing a "doable" topic and narrowing it sufficiently to write something meaningful in only ten pages is a significant challenge for students.

Among the most popular topics are the histories of various ethnic groups in the US, particularly Japanese-American Internment, Chinese exclusion, and the Civil Rights Movement. History 7B is often the first history class students have taken that encourages multiple, alternate retellings of United States history—beyond the major political events—and they frequently use the paper assignment as an opportunity to learn more about their own culture or ethnic history. This can prove challenging. A typical example is the student of Armenian ancestry who wants to use Armenian language newspapers from central California as primary sources, but does not read the language. A very common and important lesson for students is the fact that primary sources are rarely translated.

Other heavily explored themes in History 7B include the Cold War; Vietnam and the anti-war movement; suburbanization; 20th century popular culture; and local Bay Area and California political, social and economic history. Naturally, California topics are most easily researched, to the disappointment of students who want to focus on other areas of the US. But this is also an important discovery about doing history: most of the historical record is in archives, not on the Internet.

Given that libraries collect materials specifically to support faculty research and instruction, librarians might expect to see more examples like History 7B that integrate collections and curriculum. However, despite its great success, the very fact that this course is noteworthy demonstrates how challenging it can be to align curriculum with special collections content. Both the academic department and the library must recognize the potential for using the collections and devote time and effort to making the collaboration successful.

DEDICATED REFERENCE LIBRARIANS

"I was initially intimidated by the fact that I could not simply wander in and browse [The Bancroft Library's] collection, but I found it was remarkably easy to conduct research there after learning how to use the collection. I accepted

my reader's card with the pride of receiving a diploma."[13]

The parameters of the research papers in History 7B and other courses can be daunting for students, most of whom have had little or no prior experience with primary source research. Unfortunately, with the amount of material faculty have to cover in lecture, few ever take the time to explain what an archive is and how it is organized. Even the larger concept of the historical record—what has endured from the past and what has been lost—is rarely introduced.

At UC Berkeley, librarians play a key role in helping undergraduates overcome these challenges by showing them how to locate and navigate special collections. For History 7B, for example, librarians conduct course-integrated instruction: one librarian presents a mini–lecture to the whole class, where students get an introduction to the nature of the historical record and archives, a whirlwind web tour of the many kinds of primary sources they will be using in their papers, and information about seeking reference assistance. In addition, each section has its own librarian who conducts an hour-long session in one of the library's computer-equipped classrooms, focused on locating primary sources pertinent to the section theme or on using specific collections chosen for research.

Library instruction sessions cover conceptual matters, such as topic specification, citation and plagiarism, as well the mechanics of using finding aids, the OAC, library catalog, and primary source databases. In these sessions, students begin to develop a more sophisticated comprehension of primary sources, moving beyond simple recognition towards understanding the strengths and weaknesses of any source as evidence of the past.

Web-based learning objects are posted on the library's website and the campus course management system to support students and library general reference staff in the History 7B paper. A guide to finding primary sources and a web-based History 7B course guide are revised annually to match changes in the class syllabus.[14] Recently, with the introduction of the Library à la Carte content management software at UC Berkeley, course guides customized to individual discussion sections are being produced, including quick videos and tutorials on specific tools. But a need remains for additional learning objects to support use of finding aids and archival collections.

Even this degree of support cannot address all student demand for help with such an unfamiliar and challenging assignment. Consequently, the Library has developed a program of appointment-based reference called the Research Advisory Service.[15] This long-standing program, which enables students to sign up online for 30-50 minute appointments with reference staff, is heavily used by History 7B students. The History 7B librarians offer an annual review for general reference staff on the requirements of the assignment and the themes and collections of each section. History 7B librarians also work closely with Bancroft staff to facilitate the large influx of students during each Spring, for instance, arranging to pre-register students as Bancroft patrons, and teaching students about the protocols of using special collections.

A recent survey of History 7B students indicated that 68% of respondents felt that library instruction contributed "much" or "very much" to their understanding of historical research, while 80% of the graduate student instructors felt library instruction contributed "much" or "very much" to the goals of the course.[16] According to a graduate student instructor:

> Students learned not only how to search Oskicat [UC Berkeley's OPAC], but they also received detailed instructions about navigating both the actual Bancroft as well as the library's on-line finding aids. As a result, I had students visit the 'mysterious' Bancroft

even before our scheduled visit. I credit our librarian for that.[17]

A PRIZE INCENTIVE

"I developed a personal connection to the pictures and writings that I came across. There is nothing more poignant in learning about the past than being able to read and touch original pamphlets: the smell of the old printed paper just confirmed the fact that I couldn't get closer to the past."[18]

Another important undergraduate initiative at UC Berkeley is the Library Prize for Undergraduate Research, which illustrates the significance of institutional support in connecting students with primary sources. Established in 2003 and funded generously each year by the Library administration, the prize raises the visibility of and underscores the value of library research to undergraduate students at all levels of study. The criteria for the prize are:

- Sophistication, originality, or unusual depth or breadth in the use of library collections, including, but not limited to, printed resources, databases, primary sources, and materials in all media.
- Exceptional ability to locate, select, evaluate, and synthesize library resources and to use them in the creation of a project in any media that shows originality and/or has the potential to lead to original research in the future.
- Evidence of significant personal learning and the development of a habit of research and inquiry that shows the likelihood of persisting in the future.

The Library Prize has become a prestigious campus institution. Because of its reputation, faculty in a range of disciplines who assign original research projects encourage their best students to apply. In addition to the honor, the awards—$1,000 for upper division students and $750 for lower division students—provide a substantial incentive for un-

dergraduates. Among the departments that have generated prize winners are Classics, History, Music, Interdisciplinary Studies, Architecture, and Molecular and Cell Biology. A measure of the success of the Library Prize is the number of other academic libraries that have established programs based on the Berkeley model.[19] With even moderate institutional support, this model can be replicated at institutions of all sizes.

EVALUATING THE FRAMEWORK

The student comments quoted throughout this chapter show that UC is doing something right to connect undergraduate students with primary sources. Perhaps the greatest factor in UC's success is commitment, as it ultimately strengthens the chain at every link. Commitment is evident in the system-wide support for ongoing development of the OAC and Calisphere and the content there, the relinquishment of class time for library instruction, the dedication of library staff to assist students, and the allocation of funds for the Library Prize. Each of these represents a single, but significant, commitment on behalf of UC to further undergraduates' access to and use of primary sources.

Nevertheless, there is room for improvement, especially when it comes to coordination between system-wide and campus services. The CDL is funded and operated through the UC Office of the President. While this structure allows the CDL to provide independent and impartial services to the ten campuses, it also means that those services are developed a step removed from library users. It is a communications challenge, on both sides, to translate user needs into new technical features and fixes to the OAC and Calisphere. There is a need to more effectively "close the loop" between what librarians hear from undergraduate students and what changes are made. The CDL team that manages these services is currently thinking of new ways to gather feedback from the front lines that might inform future development.

Another challenge for UC is how to continually improve online search and discovery for undergraduate students. In 2009, the OAC interface was substantially redesigned to address the needs of both advanced users (archivists, librarians, faculty, and graduate students) and novice users (primarily undergraduates).[20] While the new interface incorporates many design elements for novice users, including an accessible interactive Flash tutorial, it can still be confusing and frustrating for undergraduate students. Part of the problem is that this user group typically has little or no prior knowledge about what an archival collection is and how it is organized, so structure and terminology of a discovery tool is equally baffling. Compounding this challenge is the reality that undergraduates may not be communicating directly with librarians, preferring to limit their searching to the web without outside help. They may also have the expectation that all of the resources described in a finding aid are digitized, and can become confused when they discover this is not the case.

The CDL is considering ways to enhance the OAC so undergraduate users more quickly understand how it works and what it can do for them. One idea is to create short tutorials on the OAC that explain the basics of archival organization: the kinds of materials in a collection, how they are grouped, where they are physically located, and other facts that may not be evident to the new researcher. Another area of consideration is the implementation of subject search on the OAC and/or Calisphere, as "many users prefer to learn what collections are about."[21] This, however, presents a significant technical challenge because contributed metadata varies significantly among institutions.

More work also could be done to surface and market special collections directly to undergraduate students and other users. Increasingly, repositories would benefit from the development of marketing strategies to promote use of their holdings—which comprise the most unique and unusual materials in the library—among faculty and students. Descriptions of collections need to be broadly disseminated in the path of the user, whether that is through search engine optimization, the inclusion of links to the OAC, Calisphere, and local indexes in undergraduate course software and pathfinders, blog posts, handouts, or class visits—or all of the above.

Nevertheless, UC's framework shows how a multifaceted approach can be effective in connecting undergraduate students with special collections and archival materials. Each link in the research chain—discovery tools, research assignments, faculty and librarians—plays a part in bringing students to the sources. Together they comprise a workflow that is not unlike the research process itself, described by one undergraduate who appreciated all that it involves:

"I learned that a systematic approach to research is essential, but is not the only strategy necessary for success [...] I began to understand the necessity of various research methods working in synergy. Simultaneously, I read and transcribed manuscripts, consulted hundreds of pages of published primary literature, systematically searched for secondary sources, and serendipitously discovered some important primary and secondary sources [...] For me, the convergence of these processes is what made the research creative and enjoyable."[22]

NOTES

1. Evita Rodriquez, 2004. Unless otherwise attributed, all of the quotes in this chapter have been extracted from student essays recognized by UC Berkeley's annual Library Prize for Undergraduate Research (see http://www.lib.berkeley.edu/researchprize/).
2. http://www.oac.cdlib.org
3. For a more detailed history of the OAC and a bibliography of articles and reports on its development, see http://www.cdlib.org/services/dsc/oac/history.html.
4. http://www.calisphere.universityofcalifornia.edu.
5. This project was funded by the Library Services Technology Act (LSTA). JARDA is available at http://

www.calisphere.universityofcalifornia.edu/jarda/.

6. For additional background on JARDA and other early collection building projects on the OAC, see: Chandler, Robin. "Building Digital Collections at the OAC: current strategies with a view to future uses." *Journal of Archival Organization* 1, no. 1 (Spring 2002): 93-103.

7. For example, the regional history collection is the result of the Local History Digital Resources Project (LHDRP), a multi-year partnership between the CDL, the California State Library, and Califa Library Group since 2000. LHDRP is supported by the Institute of Museum and Library Services under the provisions of LSTA and administered in California by the State Librarian. For more information, see http://califa.org/lhdrp.php.

8. Stefanie Shih, 2005.

9. http://history.berkeley.edu/faculty/Einhorn/H7B/7B.pdf

10. http://americancultures.berkeley.edu/about.html

11. Berg, Ellen. "History 7B: Undergraduates Explore Bancroft Collections." *Bancroftiana*, Volume 119 Fall 2001. http://bancroft.berkeley.edu/events/bancroftiana/119/history.html

12. Jeff Rogers, e-mail message to Lynn Jones, February 21, 2010.

13. Elizabeth Mattiuzzi, 2005.

14. For guide to finding primary sources, see: http://www.lib.berkeley.edu/instruct/guides/primarysources.html

15. http://www.lib.berkeley.edu/doemoff/ras.html

16. History 7B student, in-house assessment, UC Berkeley Library, conducted May 2010.

17. History 7B graduate student instructor, in-house assessment, UC Berkeley Library, conducted May 2010.

18. Elizabeth Mattiuzzi, 2005.

19. Jones, Lynn. 2009. "The Rewards of Research—Library Prizes for Undergraduate Research." *College & Research Libraries News.* 70, no. 6: 338.

20. For more information on the OAC 4.0 redesign, see *R/Evolution of Access: The Online Archive of California Interface Redesign.* Panel presentation at Society of American Archivists Annual Meeting, August 2008. Available at http://www.cdlib.org/services/dsc/publications/.

21. Schaffner, Jennifer, 2009. The Metadata is the Interface: Better Description for Better Discovery of Archives and Special Collections, Synthesized from User Studies. Report produced by OCLC Research. Published online at http://www.oclc.org/programs/publications/reports/2009-06.pdf.

22. Benjamin Botts, 2003.