

# Teaching Institutional History with Primary Sources Toolkit

## Authors

Eva Johnston, Senior Economic Education Specialist

Genevieve Podleski, Senior Analyst, Research Information Services

## Grade Level

9-14

## Introduction

Although social scientists like sociologists and economists have studied the growth and nature of various institutions for decades, historians tend to think of institutions as the backdrop of history—a theater set for the events and lives that history is made of. But government entities, religious bodies, corporations, and even social organizations all have lives of their own that can show the slow movement of history.

This toolkit offers an overview of institutional history and provides tools for teaching institutional history with primary source documents. It focuses on the communications of institutions—with the public, with other institutions, and internally—to help students understand and engage with impersonal entities. As a teacher, you will learn how the concept of institutional history can enhance material you are already teaching. This toolkit includes

- an overview of institutional communications and how institutional primary sources are created;
- a rubric for assessing the utility of primary sources for student research projects;
- inquiry questions for institutional history projects;
- guidelines and an example of how to repurpose an existing lesson to spark new projects; and
- a framework to build a student activity for analyzing primary sources.

## Objectives

Students will

- examine primary sources from institutions;
- assess the legitimacy of the institution;
- explore the relationship of the institution with other institutions; and
- determine the purpose of the institution.

## Materials

- Computers with internet access for students to link to the following:
  - Inquiry questions for institutional history projects
  - Student activity sheet for analyzing primary sources (Handout 1)
- Any primary source or set of primary sources from an institution

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## Overview: Studying Institutional History

### What is Institutional History? What is an Institution?

Institutional history focuses on the study of the development of individual institutions—social **entities** that have their own goals, identities, and influence on the society in which they exist. The study of institutions is well-established in other fields: Political science, economics, anthropology, and sociology all study institutions and their histories. Though historians are less accustomed to thinking of “institutions” as a category, we have always studied them, and history classes have always included them. To study an institution, and not just the individuals who led it, opposed it, or were part of it, requires historians to think of these social entities as both more than just the sum of their parts and more than the backdrop for the actions of their leaders and innovators.

Institutions are the defined social structures that shape our culture and society. The First Amendment of the Constitution sketches out a few common kinds of institutions: establishments of religion, the press, and organizations that are natural outgrowths of people who “peaceably” assemble. When the First Amendment guarantees the right of those peaceable people “to petition,” they are usually petitioning institutions (particularly government institutions). Every government is an institution, generally made up of many institutions, which are themselves defined by a collective agreement codified in another institution—the law. The U.S. Congress, the nuclear family, and Spelman College, to name just a few, are all institutions.

What are the different kinds of institutions?

- Government
  - Federal, state, and local; inter-governmental (NATO, UN); non-governmental organizations/NGO (Doctors Without Borders, the YMCA); quasi-governmental (USPS, Federal Reserve)
- Corporate and business
  - Publicly held (Apple, Walmart); privately held (Enterprise Rent-A-Car, Mars)
- Educational and scientific
  - Public institutions (University of Pennsylvania, New York Public Schools, San Diego Zoo); private institutions (University of Chicago, MIT, St. Louis Symphony Orchestra); hybrid institutions (Oak Ridge National Laboratory); for-profit institutions (University of Phoenix); not-for-profit institutions (Institute for Advanced Study, Boston Public Library)
- Voluntary
  - Charitable organizations (United Way, World Wildlife Fund); social organizations (school alumni associations, Girl Scouts of America); religious organizations (churches, mosques, affiliated organizations); collective organizations (AFL-CIO, NAACP, NRA)
- Informal and cultural with no established organization
  - Families (nuclear, extended); social classes; neighborhoods; fandoms; the LGBTQ+ community

There are many more institutions than are listed here, and more types of institutions. This is intended to be a starting point to help you think about where institutional history fits into your teaching of history.

### Why study institutions?

Institutions are generally (but not always) slow to change. Studying the development of an institution can help students who may get bogged down in dates and names to see the trajectory of larger historical trends.

Although it's common to think of any institution as just a container for the people and events within it, institutions *do* change—the Congress of 1789 had different values, practices, and role in society than the Congress of 1921 or the Congress of today. Helping your students understand the similarities and differences in civic life by studying the changes in longstanding institutions can help them understand changes in society, culture, and the lives of people who drive those changes. To study an institution as a historical actor demands that historians think of institutions as dynamic and flexible.

### How does institutional history fit into the broader study of history?

Certain kinds of history focus on the study of ordinary individuals who may give us a window into the everyday life of the past, but most history survey classes focus on large-scale trends and movements. Understanding the social role of the Presidency—that is, the Presidency as an institution—can help us better understand decisions and public actions taken by individuals who lived their public life as part of that institution. Other institutions are the same: Students cannot understand the story of Martin Luther without understanding the institution of the Roman Catholic Church, nor can they fully understand the story of Martin Luther King Jr. without understanding the Southern Christian Leadership Conference and the Civil Rights Movement more broadly.

Studying institutions and not just their famous faces can help students understand the spheres of public and private life, the different roles and decisions made by historical figures, and the unique role of collective organizations. Most students know that different Presidents (or Governors, or Labor Secretaries) have different historical impacts but may not always be able to pinpoint why. Understanding the relative power of the Presidency in each era may help fill in the blanks that might otherwise cause students to attribute differences to personality or individual achievement. Researching the history and development of institutions gives students the opportunity to develop the historical skill of “reading between the lines.”

Understanding the history of an institution can also help students identify societal values: Institutions are created by people, but many are also meant to be protection *from* individuals or groups of people. In the framework for the U.S. government, the separation of powers constrains the roles of each branch of government and its people. Students studying the Supreme Court as an institution, for instance, can dig into the values with which it was set up, analyze the priorities that rose and fell with each new Court and Justice, and learn how the Court has changed with the nation's understanding of the law, its practice, and its ethics.

## Understanding Institutional Primary Source Communications

Institutional documents are often more plentiful and easier to acquire for research projects than primary source documents created by individuals. Institutional documents also often provide more direct evidence for events in policy history. Unfortunately, they can be (or be perceived as) stuffy, dry, and hard to understand.

What's important for you and your students to know and keep in mind is that documents are a form of communication, and communication is done by people—even when those people have their identities hidden behind an institutional façade. Every press release, congressional report, announcement letter, and annual report was written by one or more individuals who served as part of the institution that gets the “official” authorship. Digging into institutional communication can help us think about who might have written those documents, what their motives and views were, and how they affected (or went along with) the institution’s goals and trajectory.

Institutions have always had a variety of ways of communicating about themselves and their activities, some more official than others. The following are brief overviews of the kinds of institutional communications you might come across and what questions they can answer:

### Institutional communication to the general public

These are documents and other recorded communications that we are most used to getting from governmental institutions. These are most likely “official” and attributed to the institution as a whole rather than to a representative or contributor. They might be produced in the normal course of business or might be one-off declarations. Examples include Ford Motor Corporation’s annual reports, your school district’s website, the Federal Open Market Committee’s *Record of Policy Actions*, a poster of the FBI’s “Most Wanted” list, the U.S. Weather Bureau’s forecast report telegrams of the 1920s, or the NAACP’s press release on the lynching of Emmett Till.

These primary sources are good for

- identifying the “party line” or the institution’s official stances on topics and events;
- characterizing the way the institution sees itself and its role in society—or the way it wants the world to see it; and
- understanding the way specific historical events were discussed in the public sphere.

### Institutional communication to other institutions

These primary sources are authored by one institution and addressed to another institution. Like institutional communications to the general public, they might be produced a single time, or they might be routine. Though these are often also credited to the institution itself, it is somewhat more likely these will have a named author, such as a president or CEO, a legal representative, or an elected or designated official. That named author serves as an official mouthpiece. Sometimes the communicating institutions are part of the same parent institution or have another formal connection, like divisions within an organization or different agencies within the U.S. government’s executive branch.

Examples include a letter from the president of Frito-Lay to the U.S. Department of Agriculture; the State of the Union address; a company’s *amicus curiae* (“friend of the court”) brief filed to indicate

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official support of one side of a Supreme Court case; Andrew Jackson’s veto message on the Bank of the United States; the Federal Reserve Chair’s monetary policy testimony to Congress; a memo from a university’s legal office to its admissions office; or a letter from the American Cancer Society to a senator working on healthcare legislation. These might have different tone or content depending on whether the communication was intended to also be published or otherwise shared with the general public.

These primary sources are good for

- understanding the players and roles in issues with two or more sides, especially large public debates (What are the sides to the argument? Which institution is on which side, and why?);
- identifying broader trends or phenomena that the institution is aligned with (Is the institution aligned with a movement or a popular point of view?);
- recognizing formal and informal connections between and within institutions; and
- analyzing the different tone of institutional relationships in public and private communication.

### Individual communication to an institution

These primary sources are authored by a private individual (or occasionally a small group that does not have a formal organization) to an institution or its representative. These are generally not intended to be public (although they may also be made public through another institution, such as an open letter published in the *New York Times*). These can be written by individuals within the institution (or within another institution) but can also be written by people outside the institution’s scope. Letters, notes, emails, telephone messages, etc., composed by an individual and received by an institution can become part of an institution’s archives, and they can serve as evidence of an outsider’s view of the institution’s reputation and societal function. Communications by people within the institution will usually be part of the organization’s normal recordkeeping files. For people who are members of an institution, it’s sometimes difficult to tell where the line is between individual communication and communication on behalf of their office. Students and researchers should look for signs that the messaging is more personal: language like “I think” or “in my opinion”; “personal” stamps or “off the record” phrasing; a friendly, chatty tone and address; or anything that sounds like the message isn’t quite solid or official, like a sentence that begins “I haven’t done the research yet, but I suspect...”

Examples include messages from constituents to their elected representatives; a 1980 letter from a prospective homeowner to Fed Chairman Paul Volcker asking him to lower interest rates; an activist’s speech at a protest of corporate policy; an email from an employee to their employer about their personnel practices; a letter from a World Bank economist to the Fed Chair expressing her personal concerns about monetary policy; or a tweet from former Congressman John Dingell to representatives of the Trump administration.

These primary sources are good for

- understanding how an organization’s work affects people’s lives;
- finding hints about an institution’s internal culture, including how much leeway people have to break from the “party line” when communicating with outsiders; and
- getting a sense of the institution’s public reputation.

### Individual communication to an individual within an institution, or across institutions

Although these primary sources may be the hardest to discover, they can often provide a rich insight into the day-to-day stories of an institution. They can offer insight into the work of individuals that makes up the bulk of institutional business, and into the philosophies, backgrounds, and relationships that affected that work. Friendly communications with colleagues and sharp conversations with political or business rivals can presage future changes in the institution's trajectory; employees and members can share grand ideas, dire warnings, or satisfied congratulations on their daily business. For individuals who came from or who go on to other institutions, these artifacts can also help researchers analyze how much (or how little) an individual contributor affected an institution. Sometimes these individual communications are included in the same artifact as communication between institutions; personal relationships often grow out of professional ones. That said, professional-personal relationships can be murky, and the world of professional ethics often frowns upon too much camaraderie in institutional relationships where objectivity is important (such as between an accountant and an auditor). Understanding which parts of a hybrid communication are personal and which are professional is important in understanding how to analyze them and how to spot something unusual.

Some examples include a memo from a congressional staffer to his boss; an email from a lawyer in an activist organization to a colleague at a similar organization, asking for advice on a tricky legal question; or a series of revisions on a research report by various NASA staff. Examples of more personal communications might include a letter from an economist at one Fed Bank to a friend at another Bank about an interesting research idea; a social media feud between Senators; a recording of a phone conversation about fishing between the President of the United States and a Supreme Court justice; or a congratulatory note from a CEO to her counterpart in another company on the occasion of a family wedding.

These primary sources are good for

- understanding an institution's internal culture, including how much leeway people have to dissent or innovate;
- discovering personal relationships among public figures; and
- learning about changes in business communication over time, including changes in awareness of and resistance to harassment.

### Individual communication to the general public

This is a very common form of institutional communication, and, like messages from individuals within and across institutions, there are often both personal and institutional aspects. Speeches are some of the most visible, but individuals' press releases, authored reports, open letters, and now even social media posts are all part of an individual's personal-institutional communication with the general public. Despite their individual delivery, they may often be edited or otherwise contributed to by unnamed institutional staff. For communications that are disseminated through newspapers or other journalistic outlets, students should also consider the institutional identity of the medium, as well as its mission and audience. Examples include Martin Luther King Jr.'s "Letter from Birmingham Jail"; politicians' campaign speeches; the @VP Twitter account; and preliminary reports from a researcher on a hot new topic.

These primary sources have much in common with the other forms of institutional communication and may be best analyzed in comparison with examples of other communications from the same period. In context, they are good for

- discovering differences between representative and institutional messages; and
- understanding the public persona of an institutional figure.

### Other relevant primary sources

Although these are the main kinds of institutional communications likely found in an organization's own records or archives, there are two other research paths that could be relevant for students looking to dig into an institution's history: contemporary material about the institution from outside sources and news coverage of the institution. While both of these are outside the scope of this toolkit, they are important to keep in mind as sources of historical context. As always, news media should be treated with caution when analyzing them as primary sources: While digging into the way an institution (or any other historical entity or topic) was covered in the contemporary news media (positive or negative language; level of coverage; prominence of coverage) is an important tool in history research, summary-style news reporting should not be considered a primary source for the facts of a topic.

Non-communication institutional records are a third type of relevant primary source. These are things like accounting and financial data, attendance records, and other business documents produced in the normal course of business for all kinds of organizations. While these can be historically very valuable, making narrative sense of them often requires a more sophisticated analysis, so we have opted to exclude them from this overview.

## Institutional Archives 101: Why do we have what we have?

Although there are many institutional archives out there serving as valuable resources for historians and history students, many new researchers may not know anything about how these primary sources came to exist.

There are great resources available on this topic, including the [primers](#) provided by the National Archives and Records Administration, which cover many of the points below in greater depth, and the [glossary](#) of the Society of American Archivists. This brief overview will hit just a few of the important facts to understand when working with institutional primary sources.

It's often said that "history is written by the victors." In the case of primary sources, history is written (or at least assisted) by a combination of bureaucracy and luck. The following are some things to know about how institutional history is created and preserved:

### Where did it come from?

- Most business and government organizations keep the documents produced by their daily business. These are known as "records" and they are generally kept within the institution for a number of years, based on the assumption that they might be needed again in the near future. This is similar to keeping copies of our own bank statements, paychecks, or school transcripts. Government records have a strict schedule of how long different kinds of documents should be kept and how they should be disposed of once they are no longer useful.
- Some organizations have institutional archives to which records can be moved once they are considered no longer needed for day-to-day business. Those archives may be open to the public, available to researchers by appointment, or not accessible at all to those outside the institution.
- Volunteer organizations may or may not keep their documents (such as financial records), depending on legal requirements. There may be more variation in the volume of records these institutions keep. What is kept or not may have more to do with the habits of their staff or members than anything else.

### What's missing (or hiding)?

- There is no "perfect" archive. Things go missing; materials are kept confidential for longer than necessary or appropriate; documents are accidentally (and intentionally) destroyed; and rules are misapplied or misinterpreted. In any collection of primary source documents, it's important to look into what's missing and why. A massive number of military personnel records, for instance, were destroyed in a 1973 fire in the National Personnel Records Center (a facility of the National Archives). Though much of the lost information can be pieced together from other sources, key documents are gone forever.
- Certain kinds of information in institutional records or in archives may be restricted or inaccessible to everyone except special users. Documents might be sealed until a certain date, have some information censored or redacted, or be stored separately for security reasons. For government documents, there are different levels of "classification" that dictate who can see them and under what circumstances. Similar organizations outside the government, like the Federal Reserve, may have similar restrictions on information. Companies might have some

records that contain “trade secrets” or other confidential information they wouldn’t want shared widely. Even individuals who keep their own documents may edit them or may decide to not allow their materials to become part of the historical record; a now famous example is [Eliza Hamilton’s](#) correspondence with her husband Alexander that she later destroyed.

- Lots of primary source documents are intentionally destroyed every day—and that’s OK! Duplicate copies, preliminary editions, and bookkeeping ledgers might hold some interest for a future historian theoretically, but in a broadly literate society, there are so many documents being created that we could all be buried in primary sources. Good records management and archival practice means that trained professionals—many of whom have backgrounds in history in addition to their special training—decide what should be kept, how it should be kept, and for how long. Like weeding a garden, this helps make more room for a wider variety of materials to be preserved for future generations.

### Where is it all?

- In the United States, records and archival materials created by the federal government are governed by the Federal Records Act of 1950 and its successor laws and amendments. This law and its regulatory updates set rules about what documents get kept and for how long, and which will end up in the National Archives. Prior to this, the National Archives, founded in 1934, collected many [scattered](#) archive and record collections of the government.
- Throughout much of history, leaders and sometimes other members of an institution considered their work documents to be their own property. When they retired or left, they took those primary sources with them. This is part of the reason we have individual [Presidential Libraries](#), even though the office of the President is part of the government.
- Primary sources live in many places. Libraries have a long history of keeping archives, and separate archives outside of individual institutions also exist. Families and individuals may keep their own document history and then donate them to a library or an archive, often after their death (these are often known as “personal papers”). The Library of Congress has a number of “papers” collections, including the [Thomas Jefferson Papers](#), which were donated along with his books that formed the founding core of the Library’s book collection. What we know about many individuals in history is partially due to the type and status of the institution to which they could give those papers.
- Archives are always intentionally created—if it’s not organized and documented, it’s just a bunch of boxes, not an archive. Archives are documented in what are called “finding aids,” which are like a cross between an index and a library catalog. These are written by archivists, sometimes with the help of specialist researchers; and they list the contents of the archive, sometimes with rich descriptions and usually with a description of how the collection came to be and how the archive got it. Although historians and other researchers can gain important new insight from the materials in an archive, almost nothing is ever “lost” if it’s in an archive.
- Many archival primary sources are available online, but the vast majority are not. Just like other kinds of research materials, whether materials are available digitally doesn’t indicate anything about their value or quality—just that someone (or some institution) wanted to present them to a wider audience. This might be its own form of institutional communication!

## Primary Source Evaluation Rubric

The purpose of this rubric is to provide an assessment tool to discern whether a collection or “source set” of primary source documents is appropriate for your intended purpose—for example, lesson extension, project learning prompt, research project, or paper prompt. This rubric is for evaluating document(s) or other materials, not for assessing student work with the documents.

### Dimension 1: Access

Can you and your students get to the material without significant barriers or complications? Assessing access helps you determine whether the primary source(s) are usable. Even the most wonderful content won't fit your project if it's impractical for your students to work with. Consider the following:

- **Physical or digital format and location.** Is it on paper only? Microfilm or microfiche? Digital but behind a paywall? Are there limits on how many users can access it at once?
- **Accessibility for the widest variety of students.** Is the content usable for screen readers or other assistive technology? If it's available in a PDF or other digital form, does it have optical character recognition (OCR) content so that students can copy and paste passages? Is digital material available in a format that works with your students' technology options (mobile, tablet, computer lab, laptops)? Is the visual quality good (i.e., is it legible)? Is there handwritten content, and if so, are your students familiar with handwriting?
- **Language of the materials.** Is everything in English (or your language of instruction)? Is the spelling standard? Are there specialty languages or writing systems used, such as shorthand or telegraph codes?

### Dimension 2: Breadth

Does the content of the collection allow for the kind of research you want your students to do? Your answer might be different for a collection used by all your students vs. a collection used by one student or a small group of students. Consider the following:

- **Is it big enough?** Does it have enough primary source material for students to dig into the research questions you want them to work on? Even a large collection with significant content on a very narrow topic may not give your students enough room to explore.
- **Is it too big?** Is the collection made up of so many materials on so many topics that it's overwhelming? Do you need to look at too many things in too many places to study any one topic or period? If a collection is too big but otherwise works for your intended project, you might be able to select just a portion of it, using either handpicked pieces (sometimes known as “source sets”) or a subdivision of the collection itself.

### Dimension 3: Credibility

Is the collection and its content reputable? Can its origins be identified? Many famous forged documents exist in history, and real historical evidence without the proper context can be misleading. Students may not have a sophisticated understanding of why a given primary source might not be an appropriate or legitimate source for their research. Consider the following:

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- Where is the content available and who is in charge of it? Is it provided by a university? A government agency? A company? A lobbying organization?
- What is the “provenance” or chain of ownership? Is it easy to find out where it came from and how the people who now have it got it? How was it curated or edited? Can you determine whether anything is missing, omitted, censored, or removed?
- Is there a known or documented bias, either in the creation of the documents themselves or in their collection? Think about Soviet archives or Federal records of Native American institutions, for instance. NOTE: Clear bias doesn’t make primary sources unusable! All historical evidence comes with cultural baggage, but it’s important to know your source’s slant before students begin to work with it.

#### Dimension 4: Density

Is it too much for your students? Determine whether or not the material is too complex or opaque for your students to use it to complete a research project in the allotted time. This is a content-focused corollary to *Dimension 1: Access*. Consider the following:

- Do you need too much expert knowledge to parse the sources? Would it take too much time away from other teaching to bring students “up to speed” on the material?
- Does the content require a high level of historical reading sophistication to decipher? Are there too many historical terms that are unfamiliar or need explanation, such as early business letter terms? Is the content very technical or full of jargon, with scant content for students to gather context clues?

## Institutional History Historical Inquiry Questions

Historical inquiry does not just happen; it takes practice. This portion of the toolkit provides some springboard questions your students can use to spark deeper learning and understanding. These questions can assist students in coming up with project learning or research paper topics and help them practice good inquiry skills.

The following questions are similar to the questions in the [Historical Inquiry with Charts](#) toolkit. Their purpose is to challenge students to think about institutions in new ways and develop tools to evaluate institutions. Having a standard set of questions to guide observation and encourage reflection ingrains analysis skills. Using the same questions allows for comparison across different institutions.

1. What makes an institution legitimate?
  - a. What group of people or other institution “gives” legitimacy to the institution.
  - b. Does law establish it? If so, at what level? (local, state, federal)
2. What powers does the institution have?
  - a. Over whom does the institution have power?
  - b. Has the power changed? How?
3. What is the power structure of the institution?
  - a. Is it independent? If so, from whom and why?
  - b. Is it dependent? If so, on whom and how?
4. What is the source of funding for the institution?
5. How does this institution relate to other institutions?
  - a. What are its peer institutions?
  - b. To which other institution(s) is it subordinate?
  - c. To which other institution(s) is it superior?
6. What is the purpose of the institution?
  - a. Why was it created?
  - b. Who created this institution?
  - c. To what end was it created? Who benefits from the creation and continued existence of this institution?

## Institutional Primary Source Guide

This guide walks you through how to take a primary source you have from an institution that you use for another lesson and repurpose it to evaluate the institution. Extending a lesson you currently teach to include evaluation of the institution(s) involved adds depth and promotes the understanding of the relevance of historical inquiry.

1. First, find a lesson that uses an institutional primary source. This example uses the [Credit History and Equal Opportunity Lesson](#) from the Federal Reserve Bank of St. Louis because it has a copy of the digitized Consumer Handbook to Credit Protection Laws published by the Board of Governors of the Federal Reserve System in December 1978.
2. Next, use the primary source rubric to decide if the document you have selected provides enough material for your students to use for the purpose you have in mind. If the document(s) pass the rubric test, proceed. If not, depending on your findings, either discard, narrow, or broaden the set of documents.
3. Set new lesson objectives for reusing the primary source with an institutional focus.
  - a. In this case, the credit history lesson is a personal finance lesson about credit history and has a history aspect in which students are asked about the Fed's involvement.
  - b. Tweak the lesson (or create a new lesson) to think about the institution. In this example, it is the Federal Reserve. This primary source document shows the Fed's historical role in consumer affairs—same primary source document, same topic, same teaching/content standards, but different focus. Students will be thinking about the Fed as an institution rather than studying this primary source in isolation.
4. Have the students apply the Historical Inquiry Questions to your document(s). One technique would be to have groups of students work with the primary source document(s) and an assigned historical inquiry question in jigsaw fashion. Students write their answers on large sticky notes and post. All students then view each in a gallery walk.
5. Follow with a wrap-up discussion of the findings and bring closure to your objectives.

## Examining Primary Sources for Institutional History

The Library of Congress' [guidelines](#) for using primary sources to teach history encourage students to notice how they feel when viewing a historical source. It can be difficult to feel much emotion when studying many of these institutional materials—not many people are moved by memos—but understanding the how and why of these kinds of records can help teachers and students find their way back to the vivid reasons we use primary sources to study history.

This toolkit provides an adaptation of the Library's three-part guidelines. It is intended to use the close examination of unfamiliar institutional records to help students develop their ability to read within the lines of historical evidence. We have also provided a worksheet that includes one simple version of this framework, but we encourage you to adapt it to your teaching style and your classes.

### Engage

If possible, use the [Question Formulation Technique](#) (QFT) or any other technique that encourages students to ask as many questions about the source as possible. Most students will have no or limited exposure to business records, and they should be encouraged to look at many different aspects of the document. Note that some primary sources “in the wild” may have some of the following information in a catalog record or archival finding aid. Make sure your students are aware of and can use these, but consider them crucial secondary sources with reliable information about the artifacts in front of them. (For example, [this artifact](#) has no readable date on it—but the FRASER library record lists the approximate date.)

- What does it look like? Is it a paper document or some other kind of artifact? What physical characteristics do you notice? If it's paper, has the paper been creased, ripped, or hole punched? Is the paper watermarked? Does it look like letterhead, lined paper, a page from a notebook, or some other kind of special paper? Is it typed or handwritten? Was it created from a blank sheet of paper or a form? Does it have a secretary's initials or signature?
- What can you tell about the artifact's creation? Does the document include the author's name or title? The date? For older letters or telegrams, or for emails, is there a time given? Can you tell whether it was created on a business day? Is it signed or initialed? Is there a signature stamp instead of a real signature? Is there any indication that someone created the document on the author's behalf? (A common example is a typist's initials on a business letter: The author's initials are capitalized, followed by the typist's initials in lowercase, such as “JD/vmr.”)
- What is the item's purpose? Who is the intended recipient? Is there a stated topic, or does the artifact reference another item? Can you determine why the author would talk about this topic to this audience? Is the content factual, argumentative, or emotional?

- When you read or analyze the artifact, what is the tone or subtext? How does the author address the recipient(s)? How do you think they viewed each other? Is the writing very formal, or is it casual or even friendly? Are there words used to indicate social ties, such as “my friend” or the signature “Love, \_\_\_\_\_”? Does the content mention shared social activities like a dinner or a holiday celebration?
- What is the overall impression you get from this artifact? Does any word, phrase, or section catch your attention? Imagine you’re the author or recipient: What is your gut reaction to this primary source?

## Explore

Students should be encouraged to piece together a simple narrative explaining the situation to which the source relates. Ask them to make a note of any missing pieces or any sections that catch their eye but they can’t yet explain, and to consider what new questions are raised from the explanation they’ve written.

## Reflect and Analyze

Have the students think about the narrative they’ve written and how the piece of evidence they have supports it. If your students are new to working with primary sources, or they need a refresher, explain that no primary source can tell the story of history by itself. Each piece of evidence is influenced by the individual and cultural biases of its creator(s). Like a quilt, history must be pieced together from many different sources to create a coherent whole. Ask students to answer the following two big questions:

1. How does this fit into what you already know about this period of history?

Students should analyze how the *content* of the primary source confirms or contradicts historical knowledge they’ve gained through other sources. They should also consider how the *existence* of the primary source fits with their historical knowledge. Encourage students to think not only about how the item was created, but also about how it was preserved and made accessible to them. Who collected it? Where was it stored? Who paid for it to be taken care of until today? Why?

2. What are the shortcomings of this primary source as a piece of evidence?

Have the students try to identify any missing pieces of the source. What other information could the source have included to make the story clearer? Encourage the students to try to determine if the source is leaving things out, misrepresenting facts, or trying to tell the story in the best (or worst) possible way. Students should try to identify the bias or point of view of the source: What did the creator of the document assume everyone seeing it would know or believe? If the students struggle to identify any biases or stereotypes, encourage them to return to the things they noticed when examining the artifact and creating their historical narrative: Try to explain words, phrases, images, etc., that have emotional resonance or that raise questions.

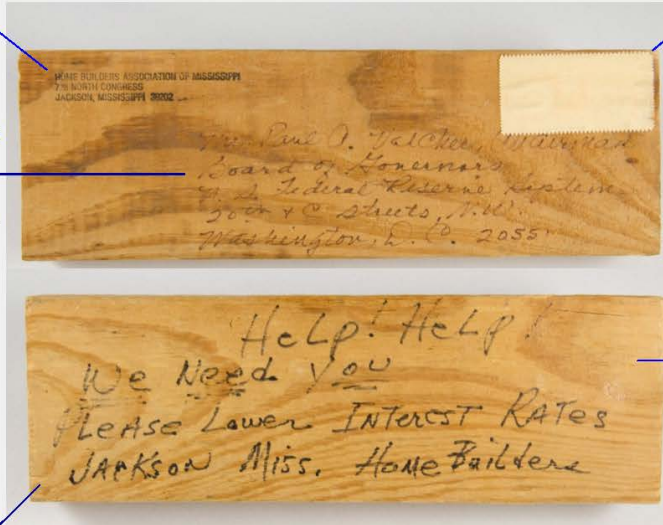
Finally, have the students use their notes to create new research questions inspired by all three parts of their analysis.

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This piece of wood has been stamped just like an envelope. What does that tell you about the Home Builders Association?

What is this, and what does it tell you about the other institution involved with this artifact?

The address uses the Chairman's full name and address, and the full name of the institution. Who are the Home Builders talking to?



What does the material the message is written on tell you about the message? How do you think the builders felt about it? How do you think the Fed felt about it?

Think about the way this message is written. Is this how you would expect a business organization to write to a government institution? Who is "you" in this message? Who is the "we"?

Now that you've looked at this artifact, what other questions do you want answered?

## Handout 1

Name \_\_\_\_\_

Hour \_\_\_\_\_ Date \_\_\_\_\_

### Institutional Primary Source Analysis Activity

1. Write down your first impression of this artifact.
2. Look at the physical aspects of the artifact—what can you tell from it? That is, what does it look like? What is it made of? Is it damaged? Write down at least two things you notice about the physical item.
3. What information does the artifact have about what it is? That is, does it have a date? An address (to or from)? A signature? Write down as many facts as you see on the artifact. Pay special attention to information that indicates what institution(s) are involved.

The institution(s) \_\_\_\_\_ (name) \_\_\_\_\_

4. Is this a written artifact? Is it formal? Personal? Can you tell anything about how the writer felt about the subject or recipient based on the vocabulary used (such as nicknames or jokes)? Write down one thing you notice about the words used.

## Handout 1

Name \_\_\_\_\_

Hour \_\_\_\_\_ Date \_\_\_\_\_

### Institutional Primary Source Analysis Activity

5. In 1-3 sentences explain what this artifact is and what it says. For instance, “This is a 2x4 block of wood sent to Federal Reserve Chairman Paul Volcker in October 1979 from the Mississippi Homebuilders Association demanding lower interest rates. High interest rates kept people from being able to afford new homes.”
  
6. How does this artifact fit into what you already know about this topic and period of history?
  
7. How does this document reflect on the institution and its involvement in this topic and period of history?
  
8. What are the shortcomings of this primary source artifact as a piece of evidence?

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## Standards and Benchmarks

### College, Career & Civic Life C3 Framework for Social Studies State Standards

#### Dimension 2. Applying Disciplinary Tools and Concepts

- **Historical Sources and Evidence: By the End of Grade 8**

- D2.His.11.6-8: Use other historical sources to infer a plausible maker, date, place of origin, and intended audience for historical sources where this information is not easily identified.
- D2.His.12.6-8: Use questions generated about multiple historical sources to identify further areas of inquiry and additional sources.
- D2.His.13.6-8: Evaluate the relevancy and utility of a historical source based on information such as maker, date, place of origin, intended audience, and purpose.

- **Causation and Argumentation: By the End of Grade 8**

- D2.His.14.6-8: Explain multiple causes and effects of events and developments in the past.
- D2.His.15.6-8: Evaluate the relative influence of various causes of events and developments in the past.
- D2.His.16.6-8: Organize applicable evidence into a coherent argument about the past.

- **Historical Sources and Evidence: By the End of Grade 12**

- D2.His.11.9-12: Critique the usefulness of historical sources for a specific historical inquiry based on their maker, date, place of origin, intended audience, and purpose.
- D2.His.12.9-12: Use questions generated about multiple historical sources to pursue further inquiry and investigate additional sources.

- **Causation and Argumentation: By the End of Grade 12**

- D2.His.14.9-12: Analyze multiple and complex causes and effects of events in the past.
- D2.His.15.9-12: Distinguish between long-term causes and triggering events in developing a historical argument.
- D2.His.16.9-12: Integrate evidence from multiple relevant historical sources and interpretations into a reasoned argument about the past.