

ABSTRACT

Title of Dissertation: STUDENTS AS HISTORICAL DETECTIVES: THE
EFFECTS OF AN INQUIRY TEACHING APPROACH ON
MIDDLE SCHOOL STUDENTS' UNDERSTANDING OF
HISTORICAL IDEAS AND CONCEPTS

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National tests of student achievement in history have been poor for nearly 100 years, yet instructional practices have remained largely static – pedantic, teacher-centered, textbook-driven, and dull. This study investigates the use of a student-centered, inquiry approach in the teaching of traditional history content that moves beyond stereotypical portrayals of history teachers. This approach placed the interpretation of historical content in the hands of students through the analysis of primary source documents, images, maps, and statistical data as an alternative manner of learning history. Working in collaborative teams, students presented their interpretations in a variety of products and then compared their ideas to those of historians. In order to collect close-up data and to assess this type of approach, the researcher became the teacher of an 8th grade United States history class in a culturally diverse middle school, examining this approach from both the perspectives of the students and of the teacher. Primarily qualitative in nature, data sources include a researcher's journal, student

classroom discourse and assignments, interviews with students and a privileged observer, pre and post think-aloud-protocol readings of historical text, and a survey of student interests and motivations. These data were analyzed using open coding and an analysis of reading primary source text based on a continuum of reading strategies. Key findings suggest that students struggled initially with a shift in the culture of learning from traditional history classes and with reading sophisticated primary source text. The researcher found that by promoting a sense of confidence in his students and shaping the class into a community of learners, the students were able work collaboratively to develop deep understandings of both historical content and of the practices and tools of historians. They were able to negotiate difficult primary source text when the text was carefully selected for interest and direct connection to the learning objective, were analyzed in small chunks, and, when feasible, were analyzed in concert with visual images. The author also discusses the practical applications of such an approach from a teacher's perspective and implications for other stakeholders.

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OF HISTORICAL IDEAS AND CONCEPTS

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Dissertation submitted to the Faculty of the Graduate School of the
University of Maryland, College Park in partial fulfillment
of the requirements for the degree of
Doctor of Philosophy
2004

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CHAPTER 1

TRADITIONAL HISTORY INSTRUCTION AS A PARODY OF ITSELF:

SETTING THE CONTEXT OF THE STUDY

Introduction

As I sit in the back of the classroom, I gaze at the students in front of me as many of them slump in their chairs or rest their heads in their hands on the desk. It is 7:40 a.m. and the teacher is delivering a lecture about the Protestant Reformation, occasionally writing a few words on the board that the students dutifully write in their notebooks. Next to their notebooks is a typed outline prepared by the teacher, with a list of dates and important individuals from the time period, along with a short description of their accomplishments. The students are undoubtedly aware that they will be expected to study and then recall this information on a future test. Although some students likely learn and recall some information about history when taught in this way, most students do not. While this is probably how the teacher in the front of this classroom remembers learning history in secondary school and in college, this is of little consolation for his students.

My role as the social studies supervisor in a large school system takes me to classrooms like this. I see students who are often bored in their history classes due to instruction that is dry and demands little on the part of students, and who fail to see the relevance of what they are being taught. I also see teachers who are doing their best using the tools that they have learned from their own experiences in school, from inconsistent teacher education programs, and from their social studies peers in the building. At this

point, I find myself questioning the manner in which history is taught in American public schools. Alternative teaching methods for history classrooms must be investigated, and an effective way to accomplish this, in my view, is through close-up, personal studies by teachers involved in their own practices.

The presentation of countless facts and dates in a lecture/storytelling format, mixed with textbook readings accompanied by some questions, is the conception of history education that prevails in many American classrooms (Cuban, 1991; Shaver, Davis, & Helburn, 1980). The numerous stereotypical images of history teachers in the popular media stand as testament to the notion that history is boring. From movies such as *Teachers*, *Ferris Bueller's Day Off*, and *Fast Times at Ridgemont High*, as well as from countless television programs, Americans have been regularly exposed to these negative images of social studies teachers. In a comical spoof of typical United States History textbooks, humorist Dave Barry notes, "But another major part of the problem is the system used to teach history in our schools, a system known technically, among professional educators, as the Boring Method. You were probably taught via this method..." (Barry, D, 1989, p. ix).

In fact, history is normally the last subject on the list of favorite courses in surveys of high school students (Loewen, 1995, p 12). Perhaps as a consequence of this phenomenon, students also score poorly on standardized assessments in history (Wineburg 2001, pp. 31-44). Many critics of education point to these test results as a rationale for changes in history curricula (Bennett, 1994; Hirsch, 1988; Ravitch & Finn, 1987). However, to many of these critics, the solution to the problem is more of the same.

In the argument proposed by such critics, either students don't know enough about the "facts" of history, or the facts that they are taught are the wrong ones.

What these authors do not often question is the manner in which history is taught. In fact, they often point to reform efforts that encourage alternative approaches to the teaching of history as a part of the problem. Such arguments by former National Endowment of the Humanities Chairperson Lynne Cheney and conservative talk show host Rush Limbaugh became media fodder during the public debate about the National History Standards in 1994 and 1995 (Nash, Crabtree, & Dunn, 2000, pp. 188-222).

While there have been studies which examine how much children recall or understand about history, there has been little formal investigation on the influence of instructional practices (Cuban, 1991). In this study, I examine an approach to history instruction that places the interpretation of history in the hands of the students through the use of original historical documents. My students become historical detectives who sift through original documents and artifacts to determine what might have occurred, all within the context of the required history curriculum of their local school district. Compared with the conception of history instruction as teacher-centered, this method is active and learner-centered, as students use the methods of historians to learn about the past

Why this Study?

Scholars and researchers maintain that much of what teachers typically do in classrooms is teaching students the historical facts and telling them "stories" as a primary means of getting them "to know history," (e.g. Shaver, et al., 1980). An alternative to this

is having students investigate the past themselves by using primary, secondary and other original sources, as a way of getting them “to know history.” The debate essentially centers on the question of which pedagogical approaches best serve students’ learning processes and best ensure their understanding of history.

At the same time that many states are developing history standards for measuring historical knowledge that are based on the accumulated knowledge of commonly accepted historical facts and memories (Virginia Department of Education, 2004, Texas Education Agency, 2004), recent research indicates that students do not recall history very well when taught as a set of facts in isolation from meaningful reasons and/or structures for learning about the past (Barton & Levstik, 1998; Epstein, 1998; Stahl, 1996; Van Sledright & Frankes, 2000).

In this study, I strike a balance between these two apparently conflicting views of pedagogical approaches. I taught the traditional historical content expected in a set of state standards while utilizing an instructional approach that allows students to interpret history through the use of various forms of historical documents. The method used to teach this history class in my school district reflects much of what recent research indicates about student learning in history.

The impact of national, state, and local standards in history is the inevitable development of standardized testing programs to assess student knowledge of such standards. In fact, these testing programs already exist or are being planned in many states (Maryland State Department of Education, 2004; Virginia Department of Education, 2004; Texas Education Agency, 2004; Massachusetts Department of Education, 2004; Wisconsin Department of Public Instruction, 2004). As some of these

tests are based on content standards that cover enormous expanses of history and include page upon page of outcomes to learn about people, places and events, it is wise to question approaches to teaching and how these might help students succeed in understanding history.

Since traditional lecture and textbook-based methods of teaching history are ineffective in helping students to remember history (Wineburg, 2001, pp. 33-42), it is of vital importance to investigate new practices of instruction. While there is much research on *what* students learn about history, there is less intensive research on *how* students are taught history. Therefore, an investigation into alternative methods of teaching history using existing curriculum standards might help to change the focus from *what* is taught to *how* it is taught. I employed a researcher-practitioner model of investigation that placed me, as a researcher, also in the role of classroom teacher. With the exception of a few such studies (Edinger, 2000; Kobrin, 1992; Van Sledright, 2002; Wilson, 1990;), there is a dearth of research that focuses on how history is taught and examining results from the perspective of the practitioner engaged in a self-study.

Focus of the Study

By continuing to study history within the content limits and coverage demands set forth by existing history standards and a school district curriculum, and by using broad-based questions that require students to gain deep understandings about historical content and concepts, a compromise about content coverage and engaged instruction might be reached. I submit that students should be invited to participate in real historical inquiries that allow them to analyze a range of documents, writings, and non-print media in order

to draw conclusions and make inferences about historical events. By understanding the process of solving problems in a historical context, students can become more reflective thinkers and will have the ability to apply these skills to new situations. At the same time, the curricula within which these skills are taught need not stray from the essential elements of state and local content standards. That is, there is no reason to believe that students cannot simultaneously learn history as defined by history standards, become good historical thinkers, and build deep historical understandings by investigating history themselves, much as professional historians do.

The purpose of this study was to investigate the legitimacy of the proposition that different, more engaged teaching methods must be explored and tested. I originally developed the following research questions to guide the study:

1. Can such alternative methods (e.g. the investigative approach) for the teaching of history be realized in an educational environment that often ties reforms to an increasing reliance on standards and assessment?
2. In what ways does a teacher resolve the potential conflict between coverage demands and alternative teaching approaches as they teach history using a *historical-investigation* approach to instruction?
3. As a result of this instruction, will students understand history in more complex ways than they would if a traditional lecture/storytelling/coverage approach was used?

I attempted to maintain the spirit of these questions throughout the study, but an additional question emerged as I conducted this research. In a sense, this question is a result of my interpretation of all of the others.

4. What are the variables that will influence the successful implementation of a historical-investigation approach by classroom teachers?

I intend to examine this latter question as I discuss the implications of this research for teachers, administrators, teacher-educators, and policy makers.

Research Approach

I served as the teacher of an eighth grade social studies class in United States History for this study. The curriculum for this class is divided into units of instruction denoted by specific time periods in history. A *unit* of this class was taught using a mode of instruction based on a historical-investigation research approach that engaged the students in an inquiry into the past framed by the specified curriculum unit. I collected and analyzed a range of qualitative data such as audiotapes and videotapes, a researcher's journal, interviews with students and with the participating teacher, a wide range of student work, and field notes collected by a participating teacher. Significant daily classroom interactions were transcribed and the data coded using an open-coding process. A sub-sample of students from the class also received pre and post assessments such as personal motivation and interest surveys, writing samples, interviews, and a *think-aloud-protocol* process. These data were analyzed based on the students' capacity to demonstrate both *conceptual* and *strategic knowledge* growth of historical ideas and concepts.

Key terms

Heritage: This phrase is used by Kammen (1997) and Lowenthal (1998) and is defined as the accumulated and accepted public historical memory. Lowenthal notes that *heritage* is really a "celebration" of particular historical narratives. This term is often used interchangeably with *collective memory*, which connotes similar ideals about a study of the past. It is the tension between this rather traditional conception of history with the idea that *history* is a more methodical process of investigation into the past that often form the basis of arguments over what should be taught in American history classrooms.

Historiography: This term refers to the study of the set of skills and processes of inquiry that historians use to understand the past. These processes of inquiry in history are related to that of methodologies used in other forms of social science research and in the humanities.

Referential Illusion: This is the idea that textbook accounts refer directly to the past they describe via a narrative rendition of historical events. Because the actual past is lost to us in the present, this referring process is illusory.

Conceptual and Procedural Knowledge: Conceptual or *content* knowledge is divided into two categories called "foreground" and "background" concepts (Van Sledright & Franks, 2000). Although sometimes the distinctions are disputed, foreground concepts are typically described as those that "anchor written histories and structure their explanations of past events (p. 245)." Background concepts are defined as those that "inevitably arise in the act of doing historical research (p. 246)." Strategic knowledge is knowledge that is built around "research-inquiry" procedures. These are

concepts around which the processes of historical research are constructed (Van Sledright & Franks, 2000).

Historical-Investigation Approach: An approach to instruction based on the investigative work of historians; it includes the following general steps: *developing investigative questions, setting historical context, examining evidence, and constructing interpretations and formulating theories* about past events, incidents, historical actors, and progress and decline.

Summary

The objective of this study was to investigate whether students can gain deeper understandings about history if they are taught to engage in historical inquiry, rather than learn about history by attempting to memorize historical facts and narratives.

Understanding the curricular constraints under which teachers must consider all instructional decision-making (e.g. content coverage), an additional objective was to see how students would gain deeper historical understandings while working with a school district's specified history curriculum, including its scope and sequence. In other words, could instruction using a historical-investigation approach be accomplished within the constraints of a curriculum that closely follows standards and content coverage demands set forth by a rigorous state instructional framework?

As a social studies supervisor in a large public school district, I am charged with not only the evaluation of social studies teachers, but with the delivery of professional development to help them become more effective instructors. While I might advocate the use of inquiry-based methods in the teaching of history based on existing literature,

teachers often fail to see the connections between educational research and the “real world” of teaching. Therefore, if I am to ask the teachers in my own district to use such instructional methods, I am convinced that I must experiment with the methods myself. Not only does this then add legitimacy to my claims about teaching practices, but it gives me first-hand knowledge about the difficulties teachers might face if they use the investigative approach themselves. I know of no better way to inform quality professional development for teachers, while contributing to a small research base of similar studies.

What follows is a review of related literature about the traditions of social studies in American education and how my study is positioned within these traditions. I also consider issues in historical understanding, research on history learning and teaching, followed by research on practitioner-research, and I provide a more detailed rationale for my use of this method. A section will follow the broad review that presents the specific methods that I used in my study, and the strategy by which I carried out the research. This review is followed by a rich description of my experiences while teaching, an analysis of student learning, and what it was like for me as a teacher using these methods. Finally, I conclude by examining the implications of employing a historical-investigation approach to teaching for a wide range of stakeholders.

CHAPTER 2

THE EVIDENCE OF NEED: A REVIEW OF THE LITERATURE

Introduction

A variety of issues have plagued the field of social studies throughout the past century. At its beginnings, "social studies" was officially adopted as the term applied to the curricular area that was formerly encompassed primarily by history and geography. In 1916, The Committee on Social Studies of the Commission on the Reorganization of Secondary Education of the National Education Association recommended the selection and sequence of courses in the social sciences (Jarolimek, 1981; Nelson, 1994). This conceptualization of the curriculum in secondary social studies has remained in its essential form to the present.

Despite this effort to assemble the disparate disciplines under a uniform umbrella, the field of social studies has struggled to establish a collective identity and purpose. Indeed, it often remains a term used to define a loosely organized group of subjects including history, geography, political science, psychology, sociology, anthropology, and others. Barr, Barth, and Shermis (1977, p. 1) state, "The field of social studies is so caught up in ambiguity, inconsistency, and contradiction that it represents a complex educational enigma. It has also defied any final definition acceptable to all factions in the field."

Arguments about the purposes of social studies education can be grouped into three broad categories. To many, the social studies curriculum is viewed as a vehicle to inculcate a diverse citizenry to a common set of values and ideals. Beginning with the Progressive Era, others began to theorize that the main goal of the social studies should

be to establish a forum for the discussion of social issues within the context of American Constitutional rights, and of ethical and humanistic values that form an important element of Western culture. Others have advocated an approach to teaching the social studies in a manner that is consistent with how the disciplines themselves create meaning. That is, students should be taught to think and solve problems the way that social scientists do.

Social Studies as Cultural Literacy

One common agreement among many educators is that citizenship education should be the primary goal of the social studies. The manner in which this goal is to be achieved varies greatly, however, depending upon political and/or pedagogical orientation. At the beginning of the 20th century, as masses of immigrants from around the world entered the United States, it was thought that students needed to be indoctrinated in the beliefs and values of American society (Martorella, 2001). It was argued that students should be taught that there are certain beliefs and values that are deemed "right," without regard to interpretation or perspective. In this theory, citizenship is attained by storing a certain set of facts and ideas that are part of common American democratic traditions and experiences. These facts and shared cultural memories are determined through a consensus of political and educational authorities, and form the basis of the social studies curriculum. These facts are then transmitted to the students via descriptive and persuasive pedagogical approaches (Barr, Barth, & Shermis, 1977).

This particular orientation has often been associated with those who possess more conservative political and educational views. Proponents argue that students increasingly fail to understand some of the essential facts and shared understandings that lead to an informed citizenry (Bennett, 1984; Hirsch, 1988; Ravitch & Finn, 1987). As evidence to

support these conclusions, they point to standardized tests such as the National Assessment of Educational Progress (NAEP), as well various state assessments and national surveys, which claim to measure student understandings about social studies, and about history in particular.

Ravitch and Finn (1987) elaborate upon the problems related to America's educational system as they see it. They claim that too much emphasis has been placed on critical thinking skills in social studies classes, at the expense of historical content knowledge. Additionally, they argue that attacks on curriculum by special interest groups have further eroded the core of basic knowledge that Americans have traditionally been expected to know (Ravitch & Finn, 1987).

Hirsch (1988) proclaims, "To be culturally literate is to possess the basic information needed to thrive in the modern world" (p. xiii). This statement forms the essential position of the notion of cultural literacy that has emerged as a new twist on an old idea -- that students need to be socialized into what some people consider to be our cultural heritage. This stance is particularly widespread within the field of history. Authors such as Kammen (1997) and Lowenthal (1998) refer to this idea as the *heritage phenomenon*, or the "accumulated and accepted" knowledge of generations of American history. This term is often used interchangeably with *collective memory*, which connotes similar ideas about a study of the past as a uniformly constructed story that all should know.

Social Studies as the Study of Social Issues

A second orientation to social studies teaching and learning is based on the notion that classrooms should become laboratories for the investigation of public issues and

social justice. Here citizenship education is viewed as the development of a deep understanding of our democratic government and system of justice.

Oliver and Shaver (1966) describe how social studies can be taught by using a jurisprudential approach in the treatment of contemporary societal issues. The authors posit that there is a tremendous volume of historical data, an increasing number of sub-disciplines, and ideological competition over content matter. As a result, they suggest that students should be exposed to public problems pertinent to social studies concepts and that students should be taught to analyze these problems within the political/social framework of Western constitutional traditions.

They explain that social values and general rules of behavior are based upon the concept of human dignity. Since this is a difficult subject to evaluate, societies generally develop a governmental system of rational consent to settle disputes. In a constitutional democracy, this usually takes the form of majority rule. It is asserted that students must see themselves as part of this larger social community (Oliver & Shaver, 1966).

In ways related to Oliver and Shaver (1966), Hunt and Metcalf (1955) argue that schools should focus their attention in social studies on the treatment of controversial or “closed” issues such as race, religion, sex, and socioeconomic ideologies. They note that these topics are sources of conflict in American society that will motivate students to learn because the issues are real. Teachers should become aware of pre-held student beliefs and use them as starting points for reflective learning. They should then allow students to share these beliefs, and to create problems for the class to study by using these beliefs as a springboard. The problems can then be studied with the teacher as a democratic leader: encouraging group decision-making, facilitating communication,

assisting in the establishment of procedural rules, and guiding students in reflective thought.

More recently, Engle and Ochoa (1988) take a similar stance. They advocate the examination of social studies within the context of five dimensions of democratic ideals. These dimensions are respect for individual dignity, the right for individuals and groups to participate in societal decisions, the right to be informed, the existence of a society open to change and improvement, and the exercise of individual independence. In this tradition, Remy (1979) described a core of basic civic competencies that all Americans should know. Hartoonian (1985) also developed a similar set of guidelines for what he termed the "enlightened citizen."

Social Studies as a Process of Inquiry

A third school of educators sees social studies as a process of inquiry based on the development of deep understandings about how the various disciplines create knowledge. Dewey (1910) examined both the processes of human thought, and how educators should incorporate these conceptions about thinking into curriculum construction and classroom procedures. Dewey described reflective thought as a process of thinking by which conclusions are drawn based upon systematic inquiry and a careful examination of the grounds that might support the conclusion. He argues that reflective thinking is based upon learned principles combined with past experiences and prior knowledge about a particular circumstance. Additionally, the observation of factual information should involve the opportunity for discovery, for facts themselves do not constitute ends, but are open to repeated reexaminations.

Rugg (1936) combines the notion of reflective thought with ideas of social

reconstruction. He is critical of the schools devotion to the repetition of skills and techniques, the memorization of facts, and the lack of creativeness. Rugg believes that in order to perpetuate democratic culture, citizens must understand and critically analyze the collective problems of society. He states, "In every recurring economic crisis...unthinking citizens have tended to use as their slogan 'getting back to the fundamentals by discarding the frills'..." (p. 127). In contrast, Rugg sees that all children need an education that provides them with opportunities to think critically and that teaches them the processes used to solve problems in a democratic society.

Hullfish and Smith (1961) also focused on the idea of reflective thought and inquiry. Precious little effort, they argue, is spent on the development of the student's ability to think and solve problems. Reflection is a controlled phenomenon in which one first must recognize the existence of a problem; next, clarify that problem; then form, test, and modify a hypothesis; and finally perform an action based on the best-supported hypothesis.

Fenton (1966) argues that too much emphasis has been placed on "imposed conventions," or generalizations and facts which society presumes are those most important for students to master. Instead, content should be selected based on the needs and interests of the students, contemporary issues, core concepts of each social studies discipline, and humanistic goals. He maintains that curriculum and instruction should be designed so that students have opportunities to develop hypotheses about problems, and then verify, modify, or reject these hypotheses via investigation, leading to an evaluation of a proposed solution. Thus, Fenton advocates an inquiry approach pushed into the service of social reconstruction.

More recently, other authors have proposed a similar argument about the teaching of history. Lowenthal (1998) argues that history (or historical study) is a careful process of inquiry intended to present a carefully reasoned view of the people and events of the past. Seixas (2000) states that a disciplinary stance defines history as a process of investigation and interpretation. He argues that it is a systematic examination of the past that allows students to draw conclusions, develop opinions, and critically analyze the interpretations of others.

It is the notion of history as an investigative process as elaborated by Lowenthal (1998) and Seixas (2000) that sets the framework for this proposal. Set firmly within the social studies tradition of inquiry, the conceptualization of history teaching as a systematic examination of the past remains only recently explored in educational research. I investigate how history using an inquiry approach to instruction might be put into practice in a classroom setting by teaching a class using such practices. What follows is a review of pertinent literature related to history instruction and to researcher-practitioner approaches to research, beginning with existing research about what students know about history.

Research on What Students Know about History

Throughout this century, students have been tested about what knowledge they possess about American history. These tests generally employ a standard multiple-choice format, as this format makes them inexpensive to create and efficient to score. As an example of the only current nationally normed test in American history, the National Assessment of Educational Progress (NAEP) United States History Exam includes both

multiple choice and written responses. Here is a sample multiple-choice item from the 1994 NAEP United States History Exam for 8th grade students:

15. The phonograph was invented by
- A) Samuel Morse
 - B) Benjamin Franklin
 - C) Thomas Edison
 - D) Cyrus McCormick (NCES, 2004a)

Conservative critics of history education in America might argue that this question is an example of the type of knowledge that all students should know; yet they do not. If the question cited above formed a benchmark for success, the viewpoints of such critics would be correct. Indeed, in 1994, only 48 percent of eighth grade students in this nationally administered test responded correctly to this item (NCES, 2004a).

As noted earlier, a popular book by Ravitch and Finn (1987) used data from the 1986 NAEP exam to critique history instruction in American schools. In many ways, the arguments put forth by authors such as Ravitch and Finn might have some credence. As early as 1917, studies of what students recall about history have reached similar conclusions (Bell & McCollum, 1917). For example, Bell and McCollum (1917, 268-269) identified that a sample of Texas high school students scored an average of only 33 percent correct on a test of "the simplest and most obvious facts of American history."¹

In a study that replicated the Bell and McCollum research on a smaller scale, Eikenberry (1923) found similar results. Eikenberry studied the ability of thirty-four university seniors to answer a series of similar questions about American history. None of these students could recall the president of the United States during the Mexican War,

¹ The original studies cited in this section are drawn from Wineburg, 2001.

and less than one-half knew the president of the Confederacy. A *New York Times* survey of the historical knowledge of 7,000 students in 1942 yielded similar patterns (DeVoto, 1943).² Ravitch and Finn (1987) closely examined the 1986 NAEP test results in a secondary analysis and noted that less than half of the 17-year olds could locate the Civil War in the correct half of the 19th century. Indeed, the most current NAEP data differ little from the results of these other studies (NCES, 2004b).

More recent research has shown that students who are taught history as a set of facts in isolation from a meaningful historical context learn little (Barton & Levstik, 1998; Epstein, 1998; Stahl, 1996; Van Sledright & Frankes, 2000). Despite the evidence documented in such studies, many curricula in history are still based upon accumulating and recalling a panoply of historical facts and events. Rather than building upon the ideas proposed by progressive educators throughout the 19th century, any curricula that encourages student to think critically still comes under attack by traditionalists who seem to think that the methods used in the past are somehow more efficient -- a notion that Wineburg (2001) suggests is evidently not true.

So, if this is the case, what is exactly the problem of why students don't know or like history? Is this a problem of curriculum, teaching, family values, or society? If any of these is the answer, that means history education has never been "right" over the past century, as the problems identified by Bell and McCollum have continued to plague assessments of history ever since (Wineburg, 2001, 32-33).

² The original studies cited in this section are drawn from Wineburg, 2001.

Issues in Historical Understanding

A fundamental issue facing the field of history education is the meaning of historical understanding. What does it mean to understand history? Is it the accumulated and accepted knowledge of generations of history that people should recall? Authors such as Kammen (1988, 1991, 1997) refer to this idea as the “heritage phenomenon.” He states:

Heritage is comprised of those aspects of history that we cherish and affirm. As an alternative to history, heritage accentuates the positive but sifts away what is problematic. One consequence is that the very pervasiveness of heritage as a phenomenon produces a beguiling sense of serenity about the well-being of history – that is, a false consciousness that historical knowledge and understanding are alive and well in the United States (Kammen, 1988, p. 147).

Lowenthal (1998) delves deeply into this issue. He notes that heritage is really a "celebration" of certain historical narratives, designed more to suit local or nationalist ideals than to present history as a critical interpretation of the past. Although the boundaries between history and heritage often overlap, he makes a clear distinction with regard to method. History, he argues, is a careful *process* of inquiry intended to present a reasoned view of the people and events of the past. Heritage, by contrast, is the notion that the past is a pageant of struggle and success that has led to the United States to its place as the greatest of all nations.

Conservative critics of the National History Standards (1994) saw these voluntary standards as an attack on traditional interpretations of history, otherwise known as *collective memory*, or those heritage-inspired accounts Lowenthal (1998) and Kammen

(1988, 1997) describe. This speaks to the tension between history as collective memory, versus history as a process of thinking, inquiry and problem solving about the past from a range of perspectives. While supporters of the standards cited the need to show history through voices to which students have rarely been exposed, critics saw them as an attack on a (mythic) core United States culture. A condemnation of the Standards by the United States Senate in 1995 by a vote of 99-1, suggests that many Americans either do not accept or do not understand the type of history that the standards attempted to articulate (Nash, Crabtree, & Dunn, 2000).

Nash, Crabtree, and Dunn (2000) chronicled the controversy surrounding the National History Standards in *History on Trial: Culture Wars and the Teaching of the Past*. They make the argument that the notion of history as a series of conclusive facts "is not *simply* [my emphasis] an uneducated view."

It is also an ideological position of traditionalists and the political Right that particular facts, traditions, and heroic personalities, all untainted by "interpretation," represent the "true" and "objective" history that citizens ought to know. (p. 10).

Lowenthal (2000) argues that history may be difficult to learn due to a number of factors. He cites as rationale: its amateuristic nature, the immaturity of young learners, an erosion of common historical referents, the clouding of historical understanding by essentialist apologists, and the nihilism of postmodernists. Despite these drawbacks, Lowenthal argues that history is a crucial discipline. Historical understanding is relevant to everyday life, the past is "uniquely unlike the present," and the past has ongoing

consequences for the present. Thus, the discussion about historical understanding has focused often on the issue of content versus process.

State Standards and Assessments

In the midst of this turmoil over the National History Standards, many states are in the process of developing their own standards. The purposes of these standards are to guide curriculum and to form the basis of state testing programs for public schools. These state standards and assessments range from those that envision history similar to that in the National History Standards (inclusive, inquiry-based), to those which more closely resemble the type of history, or collective memory (recall), found on the 1917 era tests of Bell and McCollum.

At one end of this spectrum is Maryland, whose state testing program in social studies for elementary and middle school students was entirely performance based up to the 2001-2002 school year. In the latest versions of this test, which is called the Maryland State Performance Assessment Program (MSPAP), students were even expected to develop interpretations about history through the examination and analysis of primary documents and then apply these ideas to a contemporary situation (Maryland State Department of Education, 2002). This assessment can be situated within the inquiry tradition in social studies education. Unfortunately, Maryland has recently suspended this social studies test for elementary and middle school students in order to devote additional resources to meet new federal guidelines for reading and mathematics. There are no plans at this time to reinstate any state testing of social studies until students reach high school, an unfortunate unintended consequence of federal legislation mandates on education.

The Virginia Standards of Learning (SOL) take an opposite approach. These tests are designed to assess student's accumulated factual knowledge of historic events and individuals in a standard multiple-choice format (Virginia Department of Education, 2004). Items on this test are largely of the "factual recall" variety, with students given little opportunity for critical thinking or interpretation. In contrast to Maryland, this testing program might be situated within the tradition of cultural literacy.

This spectrum of state tests reflects the larger arguments previously detailed about the nature of historical understanding. Performance based tests such as those used in Maryland play to history as interpreted by Lowenthal and others, while tests such as those used in Virginia play to heritage accounts and collective memory. Thus, the nature of history curriculum and assessment remains as both an educational and a political issue.

Current Research on History Education

Wide differences among educators as to what constitutes the nature of history and what should be taught in America's schools has sparked a small cottage industry of sorts since about 1990 related to research on teaching and learning history. Indeed, as recently as 1991, Downey and Levstik noted that there was "a dearth of research on history teaching." Since that time, much has been written about history education by a broad range of writers and researchers who grapple with their own conceptualizations about history curriculum and instruction.

Research on Learning History

So what does it mean to understand history? While some researchers examine historical thinking by showing how experts understand it (Wineburg 1991), others point

to the need to teach students how to gain greater power to interpret history by reading multiple texts and by being exposed to a variety of perspectives (Barton, 2001; Barton & Levstik, 1998; Stahl, Hynd, Britton, McNish, & Bosquet 1996; Van Sledright & Afflerbach, 2000; Voss & Wiley, 2000). Some scholars attempt to show that students best learn about history through the interpretation of original documents and primary sources (Britt, Perfetti, Van Dyke, & Gabrys 2000; Van Sledright, 1998, 2002). Another group of researchers point to the influence of culture, family, and society as a component of historical understanding that is rarely taken into account (Epstein, 1998, Rosenzweig, 2000, Seixas, 1994, Wineburg, 2001).

Wineburg (1991) examined the reading of historical text by skilled historians as compared to high school students. The historians were differentiated from the students by their ability to determine the *subtext* of hidden and latent meaning of historical text. Wineburg defines subtextual reading of historical documents as belonging in two "spheres." The first is "the text as a rhetorical artifact." In this sphere, historians attempt to reconstruct the author's purpose, intention, and goals. In the second sphere, "the text as a human artifact," historians relate to the manner in which texts "frame reality and disclose information about their authors' assumptions, world views, and beliefs," (p. 499).

While the students in the study were generally high achievers, they tended to view the texts as "bearers of information." Whereas the historians saw the locus of authority in the questions they formulated about the texts, the students' locus of authority was the texts themselves. In addition to the manner in which each group analyzed the various texts, this phenomenon was also evident in how the legitimacy of the texts was ranked. Wineburg included textbook, fictional, and primary and secondary sources. All students

ranked the textbook readings first, while the historians all ranked these as last (Wineburg, 1991).

Stahl, et al. (1996) examined the influence of multiple source documents on student understanding about history. The researchers explored whether students could develop mental models of historical events such as those held by experts, through exposure to multiple texts over time. They propose a model that can be broken into four separate categories based on analysis of student writing: *selection* of ideas, *processing* of text, *constructing* mental understandings, and *integrating* their ideas into a final product. The authors found that while some student were able to begin to think about the past like historians; they were limited by a lack of prior knowledge about the topic. They also conclude that students need to be taught what it means to think like a historian prior to reading multiple sources.

Citing recommendations from the National Standards in U.S. History, Britt, et al. (2000) argue that reading multiple accounts of historical events “should be an integral part of high school history instruction,” (p. 439). This type of instruction requires various skills and abilities such as the evaluation of a set of documents and the construction of interpretations about the described events. The authors assert that such learning introduces an appreciation for historical complexity that is not required when examining a single textual source, as are students exposed to unfamiliar genres of primary and secondary sources and multiple text structures.

If students are to benefit from such instruction, Britt et al. (2000) recommend that teachers create a “document-based learning environment” supported by six principles: (a) learn by solving problems through coaching and structured practice, (b) support

expert representations by providing scaffolded learning activities, (c) decompose the task into elements, (d) support transfer to real world situations, (e) provide explicit, guided instruction, and (f) motivate engagement by providing challenging goals, encouragement to students, informal feedback, student control over choice, and fantasy-supporting learning. The authors then describe how such a framework is supported by a computer-based learning environment that they created called the “Sourcer’s Apprentice,” (Britt, et al., 2000).

Barton (2001) compared students in Northern Ireland with students in the United States about their understandings of historical change. He found that students in Northern Ireland were less likely to encounter the “national narratives” to which students are typically exposed in U.S. schools. Barton suggests that educators should consider how the reliance on a single narrative about the past might influence students’ historical understanding. He claims that while students may develop a sense of common identity through the conceptualization of U.S. history as one of continual progress, this approach fails to prepare them to understand the influence of the complex variables that make for deeper interpretations.

Van Sledright and Afflerbach (2000) examined how the reading of revisionist text about Andrew Jackson influenced the historical interpretations and understandings of prospective elementary teachers. Utilizing a think-aloud-protocol strategy to explore the students’ ideas as they encountered the text, they concluded that the reading of such alternative interpretations of history could have a powerful influence on the ability of the students to question traditional interpretations about the past. In particular, the readers

began to question the traditional “freedom quest” narrative tale about America’s past in light of their new understandings.

Some researchers have also investigated the complexity and sophistication with which students understand history. Barton and Levstik (1998) examined the understandings of historical significance in U.S. history among middle grade students. The researchers conducted open-ended interviews of 48 students in grades five through eight. They found that while the students were able to identify expanding rights and responsibilities as a central theme of American history, the students had difficulty with the complexities that influence the progression of this theme. Their ideas were often influenced by popular culture and by simplistic perceptions about the past from such sources as the media and the family. A conclusion of this study is that students need to learn how to critically examine traditional interpretations about the past from a “firmer historical foundation.”

Voss and Wiley (2000) reviewed a set of studies that attempted to measure student learning and understanding of history through their writing. These studies focused on whether presenting segments of history through multiple texts is superior to presenting it through single text, and on whether writing an argumentative essay about history is superior to other forms of essays. For the purposes of this study, the authors define learning as “the ability to recall or identify correctly the contents of a text.” They found that the combination of reading about history from multiple texts with writing an argumentative essay yielded the best results as compared to other learning conditions. The researchers concluded that this combination requires more cognitive processing and thus results in deeper understandings (Voss & Wiley, 2000).

The influence of culture on student learning has been shown to be significant in several studies. Epstein (1998) examined the historical perspectives brought by African-American and European-American high school students to U.S. history classes. She found that each group constructed different interpretations about U.S. history, and expressed conflicting beliefs about the credibility of various sources. Many of these differences can be traced to the lived experiences of the adolescents and of the influence of family.

Most significantly, African-American students placed greater emphasis on the credibility of family and media, while European-American students ranked the textbook and the teacher as most credible. In terms of the most important events and themes, the Civil Rights movement, the Civil War, and slavery/emancipation, were viewed as most significant by African-American students. European-American Students ranked the Civil War, the Declaration of Independence/Constitution, and other wars as most important. Not surprisingly, African-American equality was viewed as the most important theme in U.S. history for African-American students, while European-American students responded that nation building was most important (Epstein, 1998).

Other authors found that students certainly develop an understanding about history through cultural interactions both in and beyond the context of schools. When asked to write an essay about the origins of the United States, O'Connor (1991) found that a group of 24 college students constructed similar accounts. In fact, 23 out of 24 students wrote essays organized around a theme O'Connor termed a "quest for freedom." In these narratives, students wrote about how Europeans fled persecution in their homelands for freedom in America.

Van Sledright (1998) discusses how a heritage-inspired view of history based on popular film, historic sites, and family influences is embedded in the minds of children long before they learn about them in school.

Before they ever enter the history classroom, children's historical positionalities are structured around parent-shaped and culture-endowed identities deeply imbued with versions of the past constructed and nurtured by heritage keepers.

One might say, that they come to the study of history knowing it only as heritage, (Van Sledright, 1998, p. 246).

Curious about investigating the notion that Americans suffer from a lack of historical knowledge and interest, Rosenzweig (2000) conducted a telephone survey of 808 Americans to assess their perceptions about history. Among a number of findings, he discovered that most people were motivated about history the most when it had some connection to their lives. He indicates that people tended to relate historical events to their own personal development or experience.

Rosenzweig (2000) also makes a connection to schools. "Ironically, our survey finds people most detached from the past in the place that they most systematically encountered it – the schools," (p. 272). Later, he describes that respondents essentially saw their school experience as a "relatively unchanging portrait of fact—and textbook-driven instruction," (p. 276). "Thus, while the history wars have focused on content...our respondents were more interested in the experience and process of engaging the past."

In my study, I drew upon each of these ideas about student learning. By using an instructional approach, in part, imitating the work of professional historians and informed by research on learning history, I intended to demonstrate that middle school students can

indeed understand history by using such methods. Employing multiple texts, original documents, and primary sources that are selected for both historical significance and potential for student interest, I put these ideas into action through my own teaching.

Research on Teaching History

Approaches to Teaching.

Despite texts by educational philosophers throughout this century such as Dewey (1910), Rugg (1936), and Hullfish and Smith (1961) that speak to the need to teach students how to think and solve problems rather than to memorize random bits of information, this message is still problematic to many.

Even though there have been a number of efforts to alter the manner in which instruction in history is conceptualized, little has changed over the past century. Cuban (1991) reviewed empirical literature about the teaching of history from 1900 to 1980. Despite the frame of such a lengthy period of time, he found few studies investigating actual classroom practices. In the most contemporary study of Cuban's review, Shaver, Davis, and Helburn (1980) examined social studies teaching methods and concluded that most instruction primarily included teacher lectures and textbook assignments.

Goodlad (1984) conducted a detailed study of 38 schools, and published the results in *A Place Called School: Prospects for the Future*. In a chapter that describes the nature of social studies instruction, he argues that despite the fact that the goal of social studies should be the development of reasoning based on a set of learned methodologies and inquiries, this is not reflected in how teachers assess students. He notes, "The tests we examined rarely required skills other than the recall and feedback of memorized information -- multiple choice, true and false, matching like things, and filling in the

missing words or phrases,” (p. 212). Goodlad also describes the general student activity observed in these social studies classrooms as "listening, reading textbooks, completing workbooks and worksheets, and taking quizzes," while citing the lack of activities which involve problem solving, inquiry, and student involvement (1984, p. 213).

Ravitch and Finn (1987) used survey data to describe student perceptions about history instruction in schools, and these data paint a similar portrait of history instruction as dry and teacher-centered, and textbook driven:

In the eyes of the students, the typical history classroom is one in which they listen to the teacher explain the day’s lesson, use the textbook, and take tests.

Occasionally they watch a movie. Sometimes they memorize information or read stories about events and people. They seldom work with other students, use original documents, write term papers, or discuss the significance of what they are studying (Ravitch & Finn, 1987, p. 194).

Sadly, other authors have cited similar data over the course of the Twentieth Century. Good and Brophy (1978) reviewed literature having to do with teacher domination of classroom interactions and concluded that such instruction has been taking place in American classrooms for at least 100 years. Citing studies from as early as 1912 they state, “Data indicate, however, that teachers emphasize short factual questions and that this pattern has not changed much over time,” (Good & Brophy, 1978, p. 23).

McNeil (1986) conducted observations of high school social studies classes and found that teachers actually imposed limits on knowledge in order to maintain classroom control – a phenomenon she termed “defensive teaching.” Teachers felt that certain information should be withheld from or watered-down for students, giving the teachers

control over both the class discussions and the content. Given the documented results of student performance on history tests over the past century, and that the type of instruction that has taken place in social studies classrooms has remained constant, a logical conclusion is that this traditional instruction has not been particularly effective.

Seixas (2000) posits that teachers may approach the teaching of history from three different orientations. He calls these orientations "collective memory," "disciplinary," and "postmodern." Each orientation has a fundamentally different epistemological and pedagogical approach. The essential element of the collective memory approach is the underlying assumption that students should learn the collectively agreed-upon interpretation of the past. This is based on the notion that history shapes national identity, contributes to social cohesion, and provides a moral framework upon which to base social change. He notes that most school textbooks are written and most history is taught within this framework, as it has long been granted a kind of moral and political authority (Seixas, 2000). This conception of teaching history can be linked to the notions of history as heritage, and recalls the textbook and lecture-driven teaching described by Shaver, et al. (1980).

The disciplinary stance defines history as a process of investigation and interpretation. It is a careful, investigatory examination of the past that allows students to draw conclusions, develop opinions, and critically analyze the interpretations of others. Students are taught the processes of historical inquiry rather than a particular official story of the past (Seixas, 2000).

A postmodern approach to history asserts that, "all historical accounts are fundamentally positioned and politicized," (p. 29). The historian makes decisions about

the interpretation of history based on a set of criteria that are not objective, but that are shaped by the historian's own personal judgment, ideology, morality, and linguistic choices. Thus, in this approach, all history is analyzed in light of the potential motivations of the interpreters (Seixas, 2000). Both the disciplinary and postmodern stances suggest alignment with the approach to history as a process of inquiry.

Studies of Teaching.

Over the past decade, there has been an increase in interest in research about history teaching. Some of this research attempts to develop profiles of various teaching styles and their relative effectiveness with students (Brophy & VanSledright, 1997; Wineburg & Wilson, 1993), while a small group of researchers have investigated the nature of history instruction through a teacher-as-researcher methodology (Bain, 2000; VanSledright, 2002; Wilson, 1990).

Wineburg and Wilson (1993) examined two history teachers with similar academic qualifications, but with vastly different levels of age and experience. Both teachers -- Ed Barnes and Jane Kelsey -- had backgrounds in history from prestigious universities, and both taught in suburban middle class high schools. Despite these similarities, Barnes had taught for 27 years and Kelsey had just completed her third year of teaching.

These researchers analyzed the results from three exercises: evaluation of student papers, use of documentary materials, and textbook analysis. They discovered the teachers' conceptualizations about history instruction to be very different. Barnes views teaching history as "imparting a set of facts about economic and political history," (Wilson & Wineburg, 1993). While he has a vast knowledge about historical content as it

is expressed in textbooks, he seldom incorporates knowledge about the interpretive tools and practices of historians. Kelsey sees teaching history through a very different lens. History, the authors agree, is an interpretive process that should incorporate the voices of many, and it should be taught in a manner that attempts to make connections to students and their lives outside of school. The researchers appear to favor Kelsey's approach as more powerful.

Brophy and Van Sledright (1997) detailed portraits of three elementary history instructors identified by their peers as good teachers. These teachers were classified as "storyteller," "scientific historian", and "reformer." The storyteller taught engaging stories about the past, the scientific historian taught students the discipline of historical investigation, and the reformer taught students to become critical thinkers willing to question the status quo. The storyteller could be thought of as trafficking in "collective memory," whereas the scientific historian and reformer were variations on the disciplinary approach described by Seixas (2000).

Another set of studies involves the examination of teaching history from a teacher's perspective. Wilson (1990) used a teacher-as-researcher model in exploring her instruction in a third grade classroom. She explored the tension between subject matter knowledge and elementary social studies instructional practices. Wilson sees the benefit of applying deep content knowledge to her instruction, but struggles as her knowledge of the content makes it difficult to demarcate the boundaries between social studies content other disciplines. She also speaks about the need to develop an understanding of her student's learning in order to help them make sense of the content. In the end, she recognizes the need to strike a balance between subject matter knowledge and pedagogy.

But, she also observes the motivational and student engagement power inherent in approaching the subject matter from an inquiry/investigation angle.

Bain (2000) describes his experiences as a high school history teacher while considering ideas about the discipline from a range of research perspectives. He argues that history teachers can learn much about their practices by reading and applying ideas from recent research, at the same time changing student's conception of history as a distinct discipline. By applying research ideas about the potential of approaching history from a disciplinary stance built on an investigative framework, he taught his class in new ways. He notes that two mediating principles – externalizing all thinking in the classroom and creating cultural supports for disciplinary thinking -- helped him transform history as a form of knowledge for his students.

Bain (2000) cautiously states that these techniques had positive effects on his students. He maintains “students reported a noticeable and positive difference between this approach to learning history and other approaches” (Bain, 2000, p. 346). Bain also indicates “students gave more complicated definitions of history at the end of the term than they did at the beginning,” (p. 347). Finally, he makes the claim that students applied their history skills to deal with text “in a more sophisticated manner,” (p.347).

VanSledright (2002) conducted a researcher-practitioner study by teaching American history in a fifth-grade classroom. The researcher taught history to these students by engaging them in the processes of historical investigation rooted in a disciplinary approach. By drawing from recommendations from history reform initiatives and from existing research literature, he designed the lessons for this class around the work of historians. Students were asked to read and understand historical documents,

“source” these documents, judge their reliability and analyze the perspectives of the author, and corroborate information from the varying accounts in order to develop informed interpretations.

Through a wide range of data, VanSledright (2002) learned that student knowledge about the processes of history became more sophisticated over time. Adapting and modifying a coding scheme based on the work of Pressley and Afflerbach (1995), VanSledright analyzed the ability of students to read historical text through a pre-test and post-test think-aloud-protocol. The coding scheme divided reading practices into four levels: (a) Level One, *monitoring*, (b) Level Two, *intra-textual evaluations*, (b) Level Three, *evidence corroboration*, and (d) Level Four, *inter-textual evaluations*. Overall, he argues that the systematic involvement in using investigative practices in the study of history helped to move the students toward the “history-specific analyses” of Levels Three and Four. From the initial pre-test (January) to the post-test (May), students’ reliance on level three and four reading practices and strategies more than doubled.

This body of research on learning and teaching history informed the context of my study. As traditional teaching methods in history have proved ineffective and seemed contrary to the ways in which students actually make sense of history, different instructional practices, I reasoned, needed to be explored. Current research that indicates how teachers may approach history instruction that deepens student understanding led me to the practitioner-research, investigative approach I adopted.

Practitioner Research Methods

In my current role as a curriculum coordinator, I find that teachers often question inquiry-based instructional methods as too time consuming and lacking the content rigor that is necessary to meet the requirements of prescribed history curricula and state standards. Sensitive to these concerns, I believed that I needed to investigate the effects of such instruction by conducting this research myself. This underlies my choice to utilize a researcher-as-practitioner design that placed me directly in the shoes of a classroom teacher. Next, I provide more background and further rationale for using such a research design.

Teacher research is a term that is often used interchangeably with the term *action research* or *practitioner research* (for the purposes of consistency, the term practitioner research will be used throughout). Cochran-Smith & Lytle (1993) define practitioner research as "systematic and intentional inquiry carried out by teachers," (p. 7). Similarly, Altrichter, Posch, and Somekh (1993, p. 154) describe practitioner research as, "day-to-day reflection made more systematic and intensive." Other definitions of practitioner research follow this same essential construction in explaining the nature of research that is carried out by practitioners in the natural setting of their workplace.

Although this type of research has been increasingly utilized within the educational community, and has been given greater respect and legitimacy to a degree, some continue to question whether such research is valid. There is unquestionably a lack of understanding among some about the nature and aims of practitioner research. Additionally, there exists a group of cynics who do not value such work and who deny it

credibility. The aim of this section is to outline the history of practitioner research, position it within the various conceptual research frameworks, show its natural connections to teaching, and describe the elements of high quality practitioner research.

Historical Development

Although the concept of practitioner research might be traced to the work of John Dewey (Johnson, 1993), it is widely acknowledged that the term *action research* was coined by Kurt Lewin in the mid-1940's (Smulyan, 1984; Cochran-Smith & Lytle, 1993; Johnson, 1993; Hart, 1990). Working within the field of psychology, Lewin saw social problems as an opportunity to engage in social inquiry, which in turn could lead to social change (Kemmis, 1980). Lewin felt that practitioners needed to be involved in research and inquiry in their occupational fields, and that this could lead to new theories and social change (Lewin, 1948).

Working at the Teachers College of Columbia University, Stephen Corey began to apply the concept of practitioner research to education. Corey (1953) argued that most educational research was not used to institute change, and that change might be better accomplished if educators themselves were involved in the research. Corey differed from Lewin in that, although he believed practitioner research was likely to lead to improved practices, generalizations were best applied to each particular situation rather than to larger populations. This is an important distinction that often leads to confusion about the goals and nature of practitioner research.

During the late 1950's, practitioner research was being attacked on the basis that it lacked scientific and methodological rigor (Kemmis, 1980). Hodgkinson (1957) critiqued practitioner research and argued against its use. He claimed that research was too

sophisticated for classroom teachers, took time away from teaching, was a burden on the schools, was not valid scientific inquiry, and teachers might be resistant to change because they would be prone to use their research as justification to continue their present practices (Hodgkinson, 1957).

In the following decade, professional organizations seemed to agree, and began to advocate a separation between scientific research and educational practice (Sanford, 1970). This thinking was also reflected in the direction of federally-funded research. Little thought was given to directing this research to help initiate change in education, and it was not until after the 1972 Education Amendments Act that provisions were adopted to coordinate educational research efforts with the idea that it might lead to improvements in instruction (Guba & Clark, 1980).

Throughout the 1960's and 1970's, practitioner research became a tool used primarily by educators to inform local teacher training in an effort to improve practice (Ward & Tikunoff, 1982). In this spirit, Shaefer (1967) proposed that teachers utilize practitioner research to make schools centers of inquiry. Teachers might use this method of research to improve their practices in their own schools, and to develop investigative skills and add to their intellectual growth. This model led to resurgence in practitioner research during the 1970's. It reflected the dissatisfaction among educators that traditional methods of research and inquiry led to studies which were awkward to read and meaningless to instruction (Smulyan, 1984). As Krathwohl (1998) points out, traditional educational research is often viewed with skepticism by teachers as, "impractical, unrealistic, and overly complex," (p. 601).

Competing Research Frameworks

Increased interest in practitioner research came at a time when a larger discussion was taking place in education about the nature of research methodologies. Schulman (1986) noted that two competing paradigms have prompted a great deal of debate about the essential characteristics of educational research. The first paradigm was the product-process approach, which attempted to make connections between processes or behaviors, and particular measurable products (Schulman, 1986). In the debate, this research paradigm is often referred to as a *positivistic* approach.

A key assumption of a positivistic epistemological stance is that features of the social world are relatively constant and can be quantified and measured. These results can then be generalized from smaller sample groups to similar, larger populations. A positivistic approach is often seen as synonymous with quantitative research methods (Gall, Borg, & Gall, 1996). Guba (1990) notes that positivism is informed by research traditions in the physical and social sciences that rely upon the collection, measurement, and analysis of causal relationships between variables within a "value-free framework," (p. 4).

Various forms of qualitative inquiry are situated within a second research paradigm often referred to as *interpretive*. Shulman refers to studies like these as "classroom ecology" (Shulman, 1986). In contrast to the positivistic stance, the interpretive paradigm relies largely upon qualitative research methods. Typically, this research takes place in a naturally occurring setting such as a classroom, hence Shulman's term. Rather than being concerned with applying results across a larger context through generalization, findings from qualitative inquiry are firmly grounded in the setting. Corey

(1953) applies this notion to action research by noting that it's greatest value lies in promoting the effectiveness of an individual teacher, using the study data to improve practices over time, rather than extending the findings across broad educational contexts.

Data collection and analysis vary greatly, as there are many models of qualitative research that are used in education. One common characteristic of qualitative research is the inclusion of thick, descriptive data that conveys the complex culture of social environments. In education, this data might include narrative descriptions of classroom events, journal entries, student work, interviews, and audio- or video-tapes (Strauss & Corbin, 1998). Denzin and Lincoln (1994) define qualitative research in the following manner:

Qualitative research is multimethod in its focus, involving an interpretive, naturalistic approach to its subject matter. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them, (Denzin & Lincoln, p. 2).

As practitioner research is primarily associated with qualitative research methods, this type of research has become a subset of an institutional debate about what research is best. A key argument in this debate centers on the contrasting aims of generalizing certain particular statistical findings, versus attempts to gain deeper understandings about complex social experiences through description and interpretation. Practitioner research fits firmly into this latter description, as it situates research in the natural setting of schools in an attempt to investigate problems through the eyes of the practitioner.

Interconnections between Research and Teaching

Practitioner research allows teachers to become involved in the research process to solve problems related to teaching that may not be reflected in the larger body of available educational research. Classrooms are complex social environments with multiple and often incalculable variables that cannot be investigated easily through large research studies. Cochran-Smith and Lytle (1993) maintain that practitioner research by teachers has the potential to challenge the university's monopoly of expert knowledge about teaching, reconstruct conceptions of professional development to make it more meaningful to teachers, and "support a more critical and democratic pedagogy," (p. xiv).

Krathwohl (1998) notes that practitioner research empowers teachers by placing research knowledge into the hands of the practitioner. Gitlin, A., Bringhurst, K., Burns, M., Cooley, V., Myers, B. Price, K., Russell, R. and Tiess, P. (1992) explain that such a shift in knowledge construction creates a change that provides teachers with a new sense of emancipation. "The influence of the research process on who produces knowledge, who is seen as expert, and the resulting changes at the level of school practice are also part of an expanded, political view of validity" (Gitlin, p. 28). The authors note that such political validity would be established in that disenfranchised groups would be able to participate in the decision making process, to examine beliefs and actions, and initiate change.

Practitioner research also has the potential to promote the intellectual and personal growth of teachers as they gain knowledge and skills in research methods and develop a greater awareness about the possibilities to initiate change (Johnson, 1993). Furthermore, teachers tend to become more critical and reflective about their own

practice (Oja & Pine, 1989; Street, 1986), and become more flexible and more receptive to new ideas when engaging in action research (Pine, 1981). Stoll (1992) argues that if the benefits of practitioner research are the improvement of teacher practice and the refinement of professional judgment, then "student outcomes will also be enhanced" (in, Fullan & Hargreaves, 1992, p. 116).

Goswami and Stillman (1987) add that teaching is transformed through practitioner research. They note that teachers become theorists, have improved perceptions of themselves as writers, become rich resources for other professionals, become more critical of other research, can do research on a limited budget, and can collaborate with students to answer important questions about classroom experiences.

Much practitioner research that takes place in schools is also collaborative (Smulyan, 1984; Reason, 1994). Hall (1975) argues that this form of collaboration enhances the community in which the research occurs. Hall makes the claim that through collaborative practitioner research teachers tend to investigate problems of the school or district as opposed to the problems of the individual teacher. Little (1981) notes that teachers reported new patterns of collegiality, communication, and sharing as a result of collaborative practitioner research.

Characteristics of High Quality Practitioner Research for Teachers

As a research endeavor, high quality practitioner research might be defined as having the essential components of qualitative inquiry methods. Bogdan and Biklen (1998, pp. 4-7) identify five features of exemplary qualitative research. First, it is *naturalistic*, as it takes place in natural settings. The rationale is that action can be understood when examined in the environment in which it naturally takes place. Second,

it involves the collection of *descriptive data* in the form of words and images rather than numbers. Third, qualitative researchers should demonstrate a *concern with process* as opposed to outcomes or products. Fourth, the data in qualitative research should be interpreted *inductively*. Theories and interpretations should be grounded in the data, or from the bottom up. Finally, qualitative researchers should be primarily interested in making *meaning*. In other words, there should be a focus on the perspectives of participating individuals and how they make sense of their situation.

Krathwohl (1998, p. 603) describes several important characteristics of methods used in high quality practitioner research. In this description, it:

- provides professionals with a "concrete, targeted, pragmatic orientation toward improvement of practice"
- "involves systematic and intensive reflection"
- is characterized by "reflection-planning-acting-evaluation cycles"
- involves "keeping a journal of ongoing reflections"
- keeps data collection methods simple and "adequate to the task"
- involves "translating the journal into a written narrative"

Cochran-Smith and Lytle (1993, p. 27) developed an "analytic framework" for practitioner research that serves as a kind of model that researchers might consider. This framework is divided into two sections: *empirical research*, which involves the "collection, analysis and interpretation of data," and *conceptual research*, which involves "theoretical/philosophical work or the analysis of ideas."

In empirical research, teachers might gather data from three categories. *Journals* reflect the teachers' personal accounts, reflections, and interpretations of classroom life

over a period of time. *Oral inquiries* are the teachers' "oral examinations" across a range of classroom and school experiences and issues. These inquiries are done collaboratively, as two or more teachers develop interpretations gained in part from the analysis of others in combination with their own ideas. *Classroom/school studies* are defined as "teachers' explorations of practice-base issues using data based on observation, interview, and document collection," (p. 27). Here, the teacher uses a broad range of data to develop interpretations of classroom experiences. The authors note that this latter form is the methodology that is most commonly referred to as practitioner research. (Cochran-Smith & Lytle, 1993, pp. 27-40)

Under the category of conceptual research, the authors include *essays*, or the "Teachers' interpretations of the assumptions and characteristics of classroom and school life and/or research itself" (p. 27). In this conceptualization about the process of teacher research, teachers construct essays to argue for or theorize about particular ways to teach, student learning, the school environment, professional growth, or sources of knowledge. Whereas the purpose of other forms of practitioner research by teachers is to inform them about their practices, essays are intended to inform larger audience about the assertions developed by teachers (Erickson, 1986).

Practitioner research has a history with its roots in early twentieth century progressivism, and is gaining increasing acceptance as a valid form of educational research after years of scrutiny and criticism. Despite the acceptance of practitioner research as an important part of the interpretive research paradigm, debates continue about its validity as an epistemologically sound methodology. Even with its detractors,

practitioner research has gained prominence as an essential component of both educational reform initiatives and professional development programs.

As a form of research, practitioner research offers a glimpse into classroom life through the eyes of the teacher. In no other form of research does the practitioner play the role of researcher, allowing the research to be positioned in the ecological setting about which it attempts to convey meaning. In this way, the "story" of classroom experiences can be told in a manner that demonstrates credible connections to instruction, because it is through instruction that the research takes place.

Conclusion

Based upon nearly 100 years of literature about teaching and learning in history, I argue that an approach to history instruction based on inquiry-based methods is necessary if students are expected to learn in deep and meaningful ways. Taking into account variables such as family and cultural influences, what we know about the effectiveness of using multiple documents with students, and the manner in which historians actually practice their profession, I followed such an instructional approach with my students using a researcher-as-practitioner design.

CHAPTER 3

APPLYING A NEW PARADIGM: RESEARCH METHODS AND FRAMEWORK OF THE STUDY

The Curriculum: An Overview of Teaching It

In this study I taught a *unit* in an 8th Grade United States History course as set forth in the Howard County, Maryland Public School System (HCPSS) *Essential Curriculum Documents for Social Studies*. Using existing HCPSS objectives, the unit was taught using an approach called historical investigations. Students interpret real historical events rather than read historical accounts of these events from textbooks and other referential sources. They solve historical problems related to the essential objectives and recommended course content, by using a variety of sources. These sources included primary documents such as letters, new articles, broadsides, engravings, drawings and paintings, poems, songs, court records, military documents, etc., along with selected secondary and referential sources.

This unit was preceded by a unit on historiography, which set the framework for understanding the disciplinary process of historical investigation. As shown by Stahl et al. (1996), students should have an understanding of how historians go about solving problems before being exposed to multiple source documents. This unit was developed with a group of teachers at a summer curriculum-writing workshop, and the objectives reflect the work of historians in the interpretation of historical people and events. The historical content for this historiography unit is optional for teachers, so I used the period of United States history preceding the objectives of the primary unit.

The curriculum for 8th grade social studies in HCPSS is *United States History to 1877*. The objectives for this course span the time period from approximately 1754 to 1877, with some objectives designed so that teachers can reach back chronologically in order to set a context for student understanding. The 8th grade curriculum succeeds a 5th grade curriculum in United States History that spans the time period in American history from the first migrations until approximately 1790. There is an intentional overlap in the chronological framework so students are exposed to the period of American history that surrounds the establishment of the U.S. governmental system. The curriculum for grades six and seven is a two-year course sequence in geography and world cultures (HCPSS, 2002a).

The primary content unit selected for this study was entitled “New Governments” (see Appendix A). The stated goal of the unit is, “Students will demonstrate the ability to understand the development of the federal government as a result of the United States Constitution during the Federalist Period.” This unit is widely taught in middle and high school classrooms across the nation, thus it represents common content to which students anywhere might be exposed. This is significant because it will demonstrate how the instructional methods in this study might be applied using content that is nearly ubiquitous in American secondary schools.

The instructional approach used in teaching this unit employed strategies that encourage students to become historical investigators. Using the objectives of the unit, *essential questions* were developed from which emanated an *investigative question*. The purpose of the investigative question is to provide a broad-based query that serves to guide the process of the historical investigation. These investigative questions are not

necessarily directly linked to the stated objectives, but help students to understand the content expectations in the curriculum through the investigative process. By setting up the instruction in this way, the students are lead through the content requirements of the course by using an investigative process.

A common lesson design used combines large-group, smaller-group, and independent activities for students. The standard lesson format begins by *Setting the Context*. In a study that examined the influence of using multiple source documents on historical understanding, Stahl, et al. (1996) found that students were limited by a lack of prior knowledge about the topic being studied. This points to the need to expose students to the context of the historical investigation, but the overall purpose of this part of the lesson would be to help the students place the event in both a temporal and a historical sense.

There might be any number of ways to design this context setting part of the investigation. One example is to have the students read accounts about the subject(s) of the investigation from a variety of referential sources and to view pertinent graphic images in order to gain background knowledge. This would also be an appropriate time in the lesson to determine the level of prior knowledge that students might have about the subject of the investigation, allowing the teacher to understand any misperceptions based on previous learning experiences or common cultural exposure that is not necessarily historically accurate.

Following the context-setting activity, students begin the process of *Examining Evidence*. There are four loosely organized steps to this part of the investigative process. These steps are to: *examine and organize, analyze perspectives, determine authenticity*

and "source" documents, and develop historical context and interpretations. Each of these steps is designed to replicate the work of real historians as they investigate the past, and is supported by the work of other researchers (Britt, et al., 2000; Stahl, et al., 1996; Van Sledright, 2002; Wineburg, 1991).

First the students *examine and organize* a set of historic documents and/or artifacts chosen in advance by the researcher. The goal of this part of the lesson is for students to take these documents and artifacts and organize them into categories. There may be any number of ways to do this – chronologically, by type, by source, etc. -- but the primary objective throughout is to expose the students to the materials and allow them to interact with them. As research indicates, when students are exposed to multiple documents, they develop a level of complexity not required from reading a single source (Britt, et al, 2000), begin to think about the past like historians (Stahl, et al., 1996), and develop deeper understandings about the past (Barton, 2001; Van Sledright, 2002).

The next activity of each group is to *analyze the perspectives* of the various sources. They should carefully read and examine each source to determine the author's perspective. This represents the first opportunity for the students to interpret the past through critical analysis. Wineburg (1991) cites this process as distinctive among historians, and lacking in k-12 students, thus providing strong rationale for its inclusion as a part of this instructional framework. At this point, the groups begin to examine the documents and other sources carefully to *determine their authenticity* and to identify the author, date, and location of each – or, what is termed, *sourcing* the document (also known as source work).

Finally, the students analyze the historical interrelationship of these sources and can begin to see a timeline that is recognizable. Wineburg (1991) refers to this concept as “corroboration,” another heuristic that he found students rarely incorporate when reading historic documents. He notes, “...they rarely compared one account to another, searching instead for the right answer and becoming flustered in the face of contradictions,” (p. 510). At this point, students should also be ready to begin to *develop interpretations* about the subject of the investigation.

The next part of the investigation is termed *Constructing Interpretations and Formulating Theories*. Using a set of guiding questions, I engage the class in a discussion about their interpretations about the evidence and formulating theories based on what they have interpreted. This part of the lesson also takes place within small groups, or together as a large group. In either case, student ideas are shared as public information with the entire class, as a way of fostering a “community of scholars.”

Finally, students develop a critical interpretation based on all that they have learned in the course of the investigation. This involves encouraging students to apply their knowledge about the subject of their investigation to a new situation, as called for by Britt, et al. (2000). Typically, this is a comparison of their investigative subject to a contemporary one. This brings students back to the more familiar, and allows them to analyze and possibly challenge their beliefs and interpretations.

In this final part of the investigation, students respond to a broad-based question in the form of an extended writing activity. According to research by Voss and Wiley (2000), this writing should take the form of an “argumentative essay.” Their research

concluded that this form of writing, when combined with reading about history from multiple sources, produced the deepest understandings in students.

Method

Study Sample

The Howard County Public School System is a large school system in Maryland that serves approximately 47,000 students within the confines of the political boundaries of the county. Howard County is an affluent community that spends an average of \$8,076 per pupil on education over the course of a year. Despite its affluence, the school system serves pockets of economically disadvantaged students in its mostly suburban setting. Several of these populations of students are located in the large planned community of Columbia. Some of the students attending the schools in these communities tend to come from subsidized or low-income housing, are largely African American and Hispanic, and have high mobility rates. However, surrounding the lower-income housing are sprawling housing developments with students from middle-class and upper-middle-class families. This creates very racially and socioeconomically mixed populations at certain schools in the district (Howard County Public School System, 2002b).

The school selected for this study was Holly Crest Middle School (a pseudonym) in Howard County. Holly Crest is a demographically diverse school in Columbia, Maryland. Students who attend Holly Crest come from a wide variety of socioeconomic and ethnic backgrounds. As of the 2001-2002 school year, the student population was 52.1 percent white, 36.7 percent African American, 7 percent Asian, 3.8 percent Hispanic, and .5 percent Native American. Student mobility is a measure of entrants and

withdrawals. At Holly Crest, they experienced an 11.6 percent entry rate and an 8.5 percent withdrawal rate during the 2000-2001 school year. The rate of students receiving free and reduced lunch was 22 percent and 2.3 percent of the students were identified as having limited-English-speaking proficiency (Howard County Public School System, 2002b).

Although this is one of the lower-performing middle schools in the county, according to statewide assessment data, and has both a high mobility rate and a high level of participation in the federally subsidized free and reduced lunch program, it still compares favorably to other middle schools across the state at large (Maryland State Department of Education, 2002). Both the principal of the school and the 8th grade social studies teacher in whose class the study takes place, agreed to allow the research to occur at Holly Crest Middle.

A sub-sample of students was chosen to serve as the primary informants in the study. They were selected from one heterogeneously grouped 8th grade class, and include four students. This class consisted of 19 students and met on alternate days for 85-minute class periods. Care was taken to ensure that the sample group was ethnically mixed and included learners of diverse ability levels. The regular teacher of this class – Pamela Burke (a pseudonym) – participated in the study as a privileged observer, assisting with the collection of data and providing an additional perspective of instruction practices and of student learning.

Data Collection

Data collected for the study was wide ranging (see Appendix B). It included qualitative data, and a small portion of quantitative data. One part of the data collection

process traced my cognitive processes before, during, and after the study. This was done in the form of a written journal. These dated journal entries are my private thoughts and recollections about the nature and progress of the study. In addition to these private thoughts, the unit and lesson plans, as well as the supporting materials of instruction, form another part of the data that was collected and analyzed. Supporting materials used during instruction included original documents, worksheets, maps, and other assignments that form a part of the various lessons.

Lessons were videotaped and interviews audiotaped, with selected, study-relevant portions transcribed. Transcribed data was coded through the use of open coding, with the coded data then analyzed to assist in the development of assertions about the nature of the teaching process and activity. Ms. Burke played a role in the data collection process, keeping field notes based on observations of the lessons. Student work also formed a part of the data. The work included formal writing assignments, student journal entries, drawings, class notes, and a range of additional student products (e.g., posters, debates, presentations).

A variety of pre- and post-assessment data were also collected. Students participated in pre and post surveys that measure student motivation and interest levels about American history (see Appendix C). In addition, interviews, writing samples, and a *think-aloud-protocol* process before and after the study with the sample group were included (see Appendix D). This provided valuable information about the ways in which students read and process historical documents, as well as the levels of cognitive sophistication with which they comprehend the information.

The process of pre- and post-data collection included a series of steps. The first step was to conduct an interview with the students in the sample to measure their knowledge of what Van Sledright and Frankes (2000) refer to as *conceptual* and *strategic knowledge*. Conceptual or *content* knowledge is divided into two categories called "foreground" and "background" concepts. Foreground concepts are described as those that "anchor written histories and structure their explanations of past events." These might be called the *key ideas* around which an historical period is formed. Examples from the time period used in this study included the concepts of federalism, constitutional democracy, and inalienable rights. Background concepts are defined as those that "inevitably arise in the act of doing historical research" and are imposed by investigators in order to make sense of a complex past. Examples of background concepts might include causation, historical agency, and the validity and reliability of evidence.

Strategic knowledge is knowledge that is built around "research-inquiry" procedures. These are concepts around which the processes of historical research are constructed. Examples of strategic knowledge might include the ability to source a document, drawing inferences and making interpretations, and building an argument based on historical evidence. Essentially, strategic knowledge is the knowledge students have about how to engage in historical inquiry. In practice, these types of knowledge are interwoven and depend on each other.

In the next step in the data-collection process, the students completed a writing prompt that measures their capacity to interpret the nature of the type of texts being used. The third step in the process involved the students in a think-aloud-protocol and interview. Here, the students read a selected document and orally shared their thoughts

and interpretations as they read. This activity can unveil the cognitive process the reader employs as he reads and provides insight about the level of sophistication of his ability to think historically.

By using a teacher-as-researcher model, this study tends to be more ecologically grounded than those using other methods of qualitative or quantitative research. The research is directly linked to the context of the questions to which it is attempting to respond. This provides additional legitimacy to the research in that the instructor becomes the researcher. In few other ways can the ongoing, daily, and detailed thinking and decision making practices of the teacher be documented. Within the complex social environment of a classroom, with its multiple variables, some of which are very difficult to measure, this becomes a valuable advantage for the researcher as well as for the readers of the research, perhaps most notably other history teachers.

The research-practitioner design also holds unique advantages for the study of history teaching that might not be realized if I had simply observed teachers attempting to carry out the approach toward instruction called for in this research. First, as middle school teachers are often certified in elementary education and not social studies, many may lack the content knowledge or the level of understanding about historical thinking to sufficiently carry out the task, making the results of the study unpredictable. Second, many teachers may not truly understand the methods of teaching proposed in this study, or may have chosen not to use them because they are too time consuming and labor intensive, making it difficult to collect data that addresses the research questions. Finally, few similar studies in teaching history have been conducted, creating a situation in which

we have few studies that help us understand thinking-in-action around innovative teaching practices (VanSledright, 2002; Wilson, 1990).

CHAPTER 4

TEACHING HISTORY THROUGH AN INVESTIGATIVE LENS WITH PERIOD A2

Introduction

Holly Crest Middle School divides days among “A, B, or C,” with students following a different schedule on each of these days. The class chosen for this study was Pamela Burke’s second period “A-Day” class, or “A2.” I chose this class because of the varied learning levels and cultural diversity of the students. Ms. Burke is an African American woman with 11 years of experience teaching in the county, having previously taught in a school district outside of Philadelphia. She is the instructional team leader of the social studies department at the school, is well respected among her colleagues around the county, and was nominated for outstanding teacher of the year by her school principal. Ms. Burke often writes curriculum during the summer, and was undergoing district-funded after-school professional development in the History Alive® program during the time of the study. That being said, she describes herself as a rather traditional history teacher in most respects -- focusing on content, using mostly secondary source documents, and staying close to the curriculum.

When I began the study, there were 19 students in the class. During the approximately two and one-half months of the study, a student new to the district was added to the class during the first week of instruction, another student was reassigned to a different social studies section due to a scheduling change in mathematics, and another student came to the class toward the end of the study having just moved from Pakistan.

According to Pamela, this was typical of the mobility pattern that had occurred throughout the year in this class. Ms. Burke's second-period class was truly diverse. Among the original 19 students, six were white, six were black, three were Asian of three different nationalities, three were Hispanic, and one was of mixed Asian and white ancestry. Most students came from middle class or working class socioeconomic backgrounds, and several lived in subsidized housing located near the school.

My experience in working with this group of 8th graders deserves a rich description of the events as they transpired over the length of the study. In what follows, I present a chronology of these events in order to set the context for the results of my study, and the accompanying assertions that I developed.

Beginning The Journey

The first challenge that I encountered was in planning the unit of instruction in the weeks and months preceding the study. Due to some initial problems arranging logistics for the study, I realized that I would not begin the study until January rather than in October. This changed the unit upon which I was to focus, as I had promised Pamela Burke that I would remain on the curriculum schedule that she had planned. Instead of the period preceding the American Revolution – one that was fraught with controversy, thereby providing much natural fodder for historical investigations – I would be teaching about the formation of our national government. While this was certainly a pivotal moment in American history, it was also one that would further challenge my abilities to teach using this approach. Instead of mysteries such as “Who fired the first shot at Lexington Green?” or “Who was at fault at the Boston Massacre?”, I would be

attempting to engage my students in arguably more challenging and sophisticated ideas. Instead of examining the notes of soldiers in battle or looking at broadsides outlining the protests of colonists to British rule, my students would be reading the original arguments of politicians about such issues as federalism, republicanism, and democratic versus authoritarian rule.

I immediately saw this as a challenge to my essential beliefs about this mode of instruction, and realized that this might further validate my research questions. I reasoned that if I could successfully teach about this period of United States history with a group of 8th graders using a historical investigations approach to instruction, it could be done with any other part of the curriculum. On the other hand, if there were going to be instructional issues that might challenge the approach I was studying, this was the place for them to emerge.

I began planning in earnest in November of 2002. I believe that teachers should spend time with students learning about the work of historians prior to using a historical investigations approach, so this early work involved deciding how to go about this. The school system had recently developed a historiography unit under my direction, and I decided to use this as the basis of my instructional unit. Historiography can be defined as the processes used by historians to study the past. In this unit, students learn about the necessary thinking processes used by historians through the study of events in American history. As this was a draft curriculum, there were some gaps and rough edges, so I took liberties with the lessons and adapted these considerably. Pamela had intentionally avoided using most of the specific activities in this unit for the purposes of

my study, so there was a lack of exposure to the work of historians among the students in this class.

History as Investigations into the Past

As I had a lot to work with already with regard to the historiography unit, I proceeded to plan for the unit of instruction. In my journal, I recorded some initial thoughts about how to begin:

Potential Investigative Questions:

- One question might be one having to do with the compromises. Possible data sources could be: population data showing the number of slaves by state; population data of the various states; actors at the Constitutional Convention.

Key Prior Knowledge Needed:

- Weaknesses of the Articles of Confederation
- Rationale for the Confederation – experience with a monarchy; tyrannical govt.
- Regional differences among colonies – economic, cultural, slavery.
- Northwest Ordinance – likelihood of new states in future
- Philosophical ideas of Enlightenment – led to many new ideas of leadership
- Shay's Rebellion, economic problems, British forts in NW Territory,...
- Essential differences between a monarchy and a republic (Journal, 10-20-02)

This demonstrated to me that, although the potential was certainly there to engage students in some real historical investigative work, there was quite a bit of prior knowledge the students must possess in order to make sense of the materials that I

planned to use. How was I to know if they knew any of this? If there are gaps in their understandings, does this become another investigation?

Another issue immediately surfaced as I began to research the various investigations that I might try out with my students. As I noted in my journal, “The greatest difficulty I face is not the paucity of documents, but the overabundance of them. It is laborious to sift through all that is available and then to make decisions about which ones to use and in which situations. I need to be judicious in what I select to use – keeping in mind issues of relevancy, importance, readability, and interest,” (Journal, 10-20-02). Thinking about this, I asked myself, if I were a classroom teacher with a full schedule of classes, would I take the time to do this? Wouldn’t it be much easier to simply use textual sources that were readily available or that summarize the key historical ideas? I will explore these issues further in the analysis of my teaching in Chapter 6.

In the midst of this planning, I needed to meet with the class in December to explain my presence in their classroom, and to pass out the necessary permission forms in order for them to participate. After spending some time describing my project and answering their questions, I spent part of the period getting them interested in what I had planned to do with them. My journal description stated:

For the last part of the introduction, I asked for two volunteers to come to the front of the classroom. The two students who volunteered were Antonio and Jerrold (pseudonyms). I gave each an object to hold and began to ask a series of questions (about their appearance and possible uses). As I asked the questions, I made this into a mystery that they were to solve. I had them pass the objects around the room for others to see and feel. The objects I had selected were a real

Native American arrowhead and a piece of terracotta drainage pipe. The discussion was rich, and the student's questions were thoughtful.

Here are a few examples of their comments. When commenting on the piece of pipe, Antonio said, "It looks like its smooth in parts and then rough. Like it had been in salt water, and waves crashed into it." In describing the arrowhead, Jerrold said, "It is kind of sharp on the edge. Like someone chipped it away." About the piece of pipe, Shantel asked, "Where did you find this?" This was a great question, I exclaimed. I then described how I found the pipe on an island. Throughout this first lesson, I made the connection to looking at the past like a detective – a historical detective. After the class, Pamela said, "You had them! The kids were really engaged." (Journal, 12-13-02)

I carefully examined the curriculum unit I was to teach, entitled "New Governments" in order to decide how I might go about making this into a series of investigations that would help the students gain a deeper understanding of this historical period. The school system does not design lessons for most of the objectives, but leaves these pedagogical decisions to classroom teachers and provides lesson exemplars and professional development opportunities to model the system's instructional goals. Each unit also includes a detailed content outline to help guide teachers about what to teach. Based on the earlier description of the historical investigations process, I developed investigative questions based on the unit objectives and my goals of teaching students the investigative process (see Figure 4.1).

Figure 4.1. Investigative Questions for New Governments Unit

UNIT III: The New Governments

Essential Question. What were the challenges faced by the new nation in the development of a federal government, and how were these challenges overcome?

Investigative Question 1

How do historians investigate the past?

Investigative Question 2

In what ways was the first response to form a new government after independence both a success and a failure?

Investigative Question 3

What factors made the task to form a different government so difficult?

Investigative Question 4

How were differences resolved so that a new government could be formed?

Investigative Question 5

What was the nature of the arguments for and against ratification of the Constitution?

Investigative Question 6

How does the Constitution serve as a blueprint for our government to this day?

Investigative Question 7

In what ways is the Constitution a living and evolutionary document?

In planning for these investigations, I began to consider how I was to go about the processes of making this work in a classroom. I chose to have the students work in cooperative teams, or “investigative work groups.” Each group was to receive a “Document File,” with specific documents and images related to the investigative question. In the document file (essentially a large brown envelope with the group’s name

on the front and a drawing of a magnifying glass), I also included graphic organizers, guiding questions, and charts designed to help them organize information (samples of these documents appear in the Appendix). They were also to complete an “Investigative Work Form” to help them analyze the nature and interconnectedness of the primary source documents in the file. At the end of each investigation, each group was responsible for completing a culminating assignment, and individuals were also responsible for addressing key questions through either formal or informal writing.

Designing the Historiography Unit

The first major planning challenge was to design a historiography unit that would help to set the stage for the students to see themselves as historical investigators. I believed that this was important, but also felt constrained by the time schedule that I had set. I chose to focus on a few key aspects about historiography, and then to teach some of these ideas as the students went about the investigation. I made this into the first investigative question, but planned to teach it in a more structured manner since there was no specific historical content associated with these skills. I also chose to tie this into an attempt to see what gaps in prior knowledge might exist. I designed specific lessons on the following topics: artifact analysis, the differences between primary and secondary sources, evaluating evidence and determining bias, and fact versus interpretation. I also designed an activity intended to gain an understanding of what they knew about the period leading to the formation of new governments (Road to War, Declaration of Independence, American Revolution), and to teach them about various governmental terms and concepts (monarchy, democracy, tyranny, republic).

In my journal, I noted the difficulties I had in deciding what to include:

This all leads to the first investigation about the strengths and weaknesses of the Articles of Confederation. My search for documents here is problematic – some difficult readings and a few isolated images so far...

- Join or Die Cartoon
- Daniel Boone painting
- Engraving showing conflict with some Native Americans
- Quote from Noah Webster
- Quote for George Washington
- Grid/description of public lands
- Congress – western lands; issues
- Slavery in western lands
- George Washington letter about Shay's Rebellion
- Foreign trade
- Attendance in Congress
- Northwest Ordinance
- Need: map overview of Shay's Rebellion (Journal, 10-30-02)

Should I highlight certain key text? This will help them sort through the materials more efficiently.

I wrote a short summary of some significant events to fill gaps:

- Trouble with Indians
- Money Problems

- Barbary Pirates
- Shays Rebellion (Journal, 10-30-02)

I continued to outline my planning concerns in my journal:

After reviewing the Articles activity, I decided to limit the number of resources.

In a dinner conversation with my wife, I was explaining the idea behind the investigations. She said, “It’s going to take you three months!” I began to rethink this first investigation and decided to scale it down. I eliminated four of the sources to save time. I also re-examined the investigative questions and combined two of them. I also decided to make the last investigation optional (Constitution as a living document).

This scenario brings to mind my original problem – that is, can these investigations take place in a reasonable time period, and without sacrificing the story to the process of understanding how it’s constructed? I am discovering is that it is like a huge jigsaw puzzle. Choosing exactly the correct pieces to fit together each investigation is crucial. However, this task is also extremely tedious and time consuming. Is it reasonable to expect a classroom teacher to take on such a task? It seems as though these resources would have to be collected and made available for teachers in a very formulaic fashion. Does this take away their creativity? Should not teachers be expected to find resources, as this is an unspoken element of the profession? (Journal, 12-31-02)

The issues of planning and the nature of the study itself continued to make its way into my thoughts and journal as I came closer to beginning the study. The following

selection gets at my thinking at the time, and the tension of attempting to do something advocated by researchers in the context of real classroom teaching.

The more I think about the prospects of this investigation (my study), the more I realize that I am most excited about the idea of *teaching* again. It is not the study itself this is luring me back, but just the idea of having fun teaching kids again! I wonder how much of this study is going to be about just plain teaching? I think that it will be *the* major focus. I believe that this investigative approach to teaching is a good one, but it is not going to be as much “detective work” as it will be cooperative problem solving. Not every part of history has compelling questions that are controversial or interesting enough to keep kids going. It will take clever work by the teacher to structure these “problems” in a meaningful and engaging way. However, I don’t think it would be fair to say that it can be cleanly “packaged” for any history teacher to pick up and use. This must be seen as an instructional method, and I must demonstrate how teachers might model their own teaching in this way, making instructional and planning choices based on their local curriculum and the needs of their own students. (Journal, 1-6-03)

The Students

As I was preparing to begin teaching Pamela Burke’s second period A-Day class, I asked her to provide some background about the individual students in the class. We discussed an assortment of issues with various students -- reading comprehension, limited English proficiency, behavioral issues, and accommodations for special-needs students. I discovered that this was a class of students who possessed a wide range of academic

skills and reading levels, and included several students who had very troubled home situations that often translated into problems at school.

Next, I describe the students in my class. Then I focus in on two students who showed particular growth during the study, and to the four students that I selected as the primary informants. Mary is a Hispanic student from a middle class family who was very conscientious about her schoolwork, and an excellent student. Brent is a rather precocious white student who demonstrated leadership and critical thinking skills throughout my time with the class. Deng is an artistically gifted Korean student with limited English language skills and a good sense of humor. Sharon is a quiet, hard working African-American student who has just moved into the district from another school system. Rob is a sometimes talkative and moody white student who had recently moved into the class from a different school, but quickly made friends in the class. Lavol is a Hispanic student with limited English language skills and spotty work habits. Cody is a male student of Southeast-Asian descent who is academically strong but somewhat disruptive in class. Derek is an African-American student who often appeared tired and disinterested in school. He was later moved from the class because of a reassignment in mathematics. Jerrold is a popular African-American student with a positive attitude and excellent grades in school. Andruw is a recent immigrant from Central America who has limited English Language skills and a pleasant demeanor. Shantel is a very hard working, high achieving, and assertive African-American girl. She was a leader in the class, as other girls often looked up to her. Jake is a white student who is often absent and rather apathetic about school. Ann is a Chinese-American student with very limited English language skills who is unhappy that her parents have moved to America. Zeke is a recent

immigrant from Pakistan who showed promise as a student, but often misunderstood instructional expectations.

Tabitha and Margaret

As Pamela and I reviewed the list of students that I was to teach, she stopped when we reached Tabitha, an African-American female. She explained that Tabitha was recently moved into her class, but that she had done virtually no work at all and was going to receive a failing grade for the second quarter. According to Pamela, she had missed quite a bit of school due to suspensions and days when she had apparently stayed home to care for a younger sibling. She was not a behavior problem for Pamela, but tended to be non-participatory in class and had turned in no assignments the entire second quarter. Pamela indicated that she had heard some “horror stories” about her, but that, while she did little work, her behavior had been fine in her class.

Hearing all of this, I decided to take a very deliberate approach with Tabitha. She missed the first few days of class due to a suspension, so I needed to catch her up a bit when she returned. I had given the class spiral notebooks to use as their journals, and needed to provide one for Tabitha. I approached her before class began and presented her with several new notebooks. I asked, “Which color would you like?” She picked out a purple one and said, “Thanks.” I then explained what we had done in her absence and asked another student at the table to show her how to set up the notebook. I told her how happy I was that she was back in the class. This might seem rather trivial, but I believe this was an important moment.

Tabitha proved to be among my most successful students in several ways. First, she turned in all assignments, and worked very cooperatively with her group throughout

the study. Second, she showed the ability throughout to make valuable contributions in the various historical interpretations her group developed. Finally, she seemed particularly energized about the notion that her ideas were valued by both me and by her group. Her enthusiasm and commitment to the project were beneficial to the entire class.

In the midst of this study, Tabitha was suspended for threatening a teacher. Pamela asked her why she had gotten in trouble so often, as she and I had never seen this kind of behavior from her. She said simply, “You and Mr. Stout like me.” This one statement stays with me as much anything else that occurred in my study. One can never underestimate the importance of intentionally showing students that you care about them and their performance in class.

Tabitha’s response to me also brings up a potential limitation to any particular teaching approach. How much of her success was simply related to the relationship that she formed with me and with Pamela? Might this prove to be a problem if a teacher employed a historical investigations approach, yet failed to make these same kinds of personal connections to their students? How successful might this experience have been if Tabitha had made the judgment that I did not “like” her?

Margaret is a bright, but disaffected white student who would often quietly read fiction books hidden in her lap rather than engage in class activities. On several occasions, especially early in my experience, I would have to ask her to put the book away during class. She also tended to separate herself from her group, preferring to work alone on a part of the investigative problems. Pamela told me that she rarely did any work in class, and almost never did homework assignments. Despite this, she tended to do well on tests and obviously had the potential to be a high-achieving student.

During the study, I noticed that between times when she was reading her novel, Margaret had periods of high interest in some of the activities we were doing in the class. These tended to be those times when the students were asked to express their opinions about issues and to share their interpretations of historical events. In a post-study interview with Pamela, she brought up Margaret as a student who seemed to be energized by the form of instructional practice I was using with the class. “Then there are others like Margaret, who hasn’t done a lick of work since you left... You asked the kinds of questions that brought out her ability to show – ‘I know stuff.’”

On the other hand, Margaret was often a problem for her group members. She tended to work alone instead of with her partners. They would sometimes complain to me that she was not sharing her ideas with them, and she even drew a separate cartoon on one of their group assignments. This makes me wonder if this was simply an interesting manner of learning for Margaret, as this did not necessarily bode well for the others in the group. It also calls into question the nature of the collaborative environment that I was attempting to create in this class. Although Margaret apparently liked many of the strategies I employed in the teaching of history, she did not always accept her role as a member of this community of learners.

Primary Informants

The students I selected as primary informants for this study were Antonio, Mark, Amber, and Kiki. As noted earlier, I attempted to establish a subgroup of students who were racially diverse and of mixed gender. Antonio is an African American student who had recently moved into the community from another area of the district. He is bright,

friendly, and precocious, but moody and often provided a minimal amount of effort. I spent a considerable amount of time redirecting his efforts toward class work. Mark is a white student who was very popular with his peers, but who also demonstrated an inconsistent effort and at times a negative attitude toward school. He seemed to particularly enjoy class discussions, often contributing insightful comments.

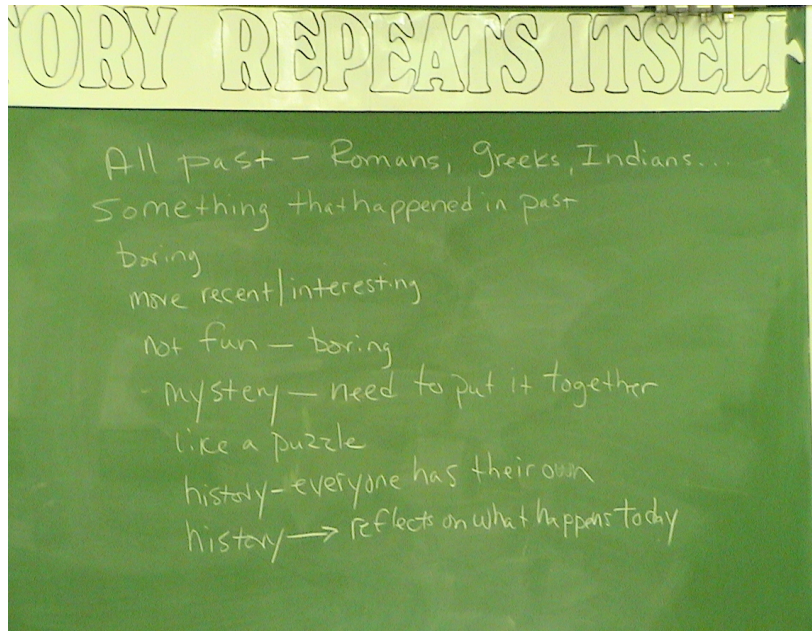
Amber is of Asian and European descent. She was a very dutiful student and a proficient reader who nonetheless appeared to lack confidence in her abilities. Amber struggled with her work group, often complaining to me that others were not contributing. Kiki is a white student of Greek ancestry. She demonstrated a high degree of prior knowledge that appeared to emanate from rich cultural experiences provided by her family. Despite such benefits, she rarely did any work outside of what she completed in class, and was always in danger of failing due to missing assignments prior to the study. She did a bit better with this during the study, but still failed to turn in several assignments.

Investigation 1 – How do historians investigate the past?

My first full period of teaching the students was on January 9, 2003. We spent that first class with some introductory activities such as making name cards, handing out spiral notebooks that were to be used as their in-class journals, and brainstorming the qualities of good cooperative group work. I also had the students complete a writing prompt that began with the statement, “History is...” This was an on-the-spot decision on my part, but I immediately saw this as a way to determine if their basic understandings about history would change over the course of my work with them. I listed their ideas on

the board, which revealed some unique and interesting insights into the minds of the students. (See Figure 4.2)

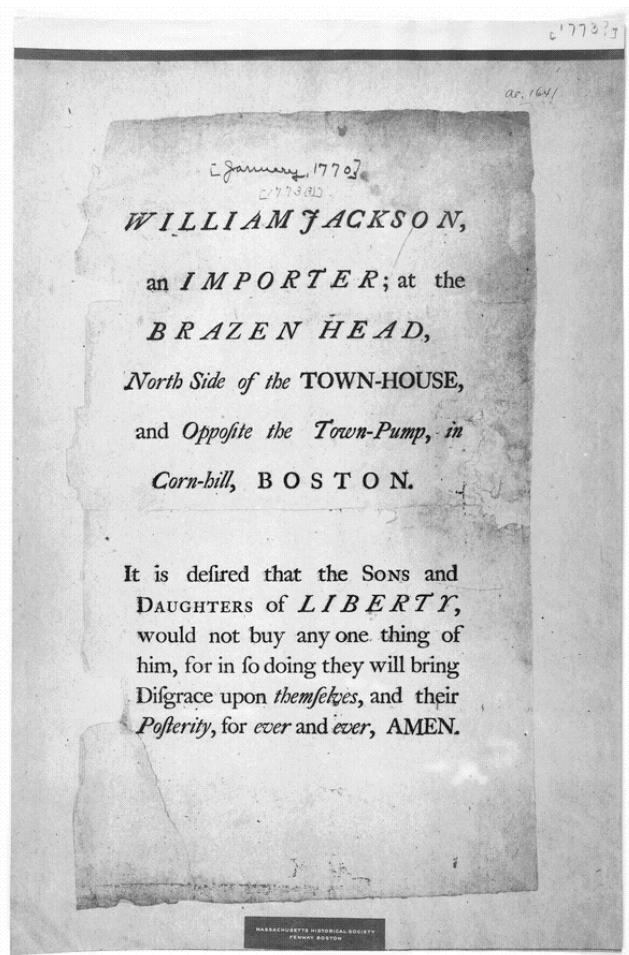
Figure 4.2. Student Ideas about History



I spent most of the next class period exposing the students to the processes of historical investigation. We first examined a series of unusual artifacts, with each group having to predict the object's original use and purpose based on clues from the artifact itself, and gleaned through a series of guiding questions. These artifacts included an ink well, a blueberry rake, a meat grinder, a lead weight, and a shoe stretcher. The students appeared to enjoy this activity, which I included to set the context of what it means to be a historical investigator. This also modeled the strategies we would use in the investigation of historical problems.

We next examined our first primary source document, a broadside from the period prior to the American Revolution. I gave the students a simple direction: “Tell me everything you observe as you examine this document.” Their observations were surprisingly sophisticated and made me think that I could probably accelerate this unit. I have included an image of the document (see Figure 4.3) and I charted their ideas, which are listed after the image.

Figure 4.3. Broadside: *Boycott of William Jackson*



Source: Library of Congress

CLASS OBSERVATIONS ABOUT DOCUMENT

Broadside -- Boycott of William Jackson

- Flier to boycott a person; maybe linked to stamp act
- Person is named William Jackson; he is an importer
- It has multiple dates; the 1641 date might be a catalog number; the earliest date is January, 1770
- There are crease marks, like it has been folded; there are marks and stains on it
- It might have been posted somewhere; nail hole
- It is kind of like a news article
- It is kind of like a letter
- It is kind of like a prayer because it says "Amen"
- It uses different fonts; some words are all capitals to highlight their importance
- Lower case "s" sometimes looks like an "f," and sometimes does not

(Overhead notes, 1-12-03)

I have since used this same document and activity with groups of teachers, and their conclusions are virtually identical to those of these 8th graders. In fact, as I was reviewing this activity with the students the next class, I noted: "I can tell you that you came up with some really good ideas about this [document]. It is making me think that you have some really good skills to become historical detectives because the responses you came up with were the same kinds of things that I came up with when I saw it for the first time." Curiously, this actually proved to foreshadow some of the *difficulties* I would face in the coming weeks with the various primary sources I would use, as I demonstrate in the next lesson description.

The next lesson in Investigation 1 was designed to allow the students to see examples of bias, and to realize how this might cloud the interpretation of evidence when investigating the past. As the students had already learned about the Boston Massacre, I used the widely known Paul Revere engraving of this event as a way to introduce the concept of bias to the students (see Figure 4.4). I used a color transparency and led the students through a series of discussion questions about the event.

Their observations were again detailed and reasonably sophisticated. For example:

Jerrold: It looks like the British are firing at the colonists because they are in a line. Like they are ready for battle.

Lavol: It looks like the colonists are just standing around. They even brought their dog with them.

Mark: It looks like it might be taking place at a town square.

Kiki: It took place at night because you can see the moon in the sky in the corner.

Corey: It looks like an ambush, because the soldiers are standing there like they were ready to shoot.

This ability of the students to analyze such visual images was something that proved to be both a blessing and a curse, as I will show.

Figure 4.4. Paul Revere Engraving of Boston Massacre



Source: Library of Congress

The next part of my lesson involved analyzing bias in textbook interpretations of the Boston Massacre. They examined five selections from textbooks in 1885, 1910, 1948, 1981, and 2002, and were to determine how authors interpreted the same event over time and in different ways. Below, I have included two examples to demonstrate the different historical interpretations. In the first example, the event is depicted in a manner that shows the colonists to be rather innocent victims, “teasing” and “throwing snowballs” at the British soldiers. In the second example, a description is provided that reveals the use

of “stones,” “oyster shells,” and “pieces of wood” by the colonists, as well as more threatening speech and action. It also provides much greater detail about the events of that day.

Example 1:

The British government sent soldiers to Boston to help collect new taxes. The colonists did not like having the British soldiers in their city. They made the soldiers feel uncomfortable whenever they appeared in the streets. Crowds teased the British whenever there was an opportunity. In March 1770, some soldiers, angered by a few boys who had thrown snowballs at them, fired into a crowd of colonists...

(Schwartz and O'Connor, 1981, p 129)

Example 2:

Throughout the next year, the tense atmosphere between the redcoats and the Boston colonists grew. On March 5, 1770, the tension finally reached a peak.

That day, a fight broke out between townspeople and soldiers. This spurred the crowd on. While some British officers tried to calm the crowd, one man shouted, “We did not send for you, we’ll drive you away!”

The angry townspeople moved on through the streets, picking up sticks, stones, shovels, and clubs – any weapon they could find...

As the crowd approached, the sentry on duty panicked and called for help. Seven soldiers stationed nearby rushed into the street to confront the raging crowd. The crowd responded by throwing stones, snowballs, oyster shells, and pieces of wood at the soldiers. “Fire, you bloody-backs, you lobsters,” the crowd screamed. “You dare not fire.”

After one of the soldiers was knocked down, the nervous and confused redcoats did fire...

(Appleby, Brinkley, and McPherson, 2002, p 139)

Despite such rich differences among the texts, the students struggled with this activity, as they tended to miss some rather obvious differences among these various referential sources. I observed in my journal:

I have noticed that the students seem to have wonderful responses to the visual images. They take the time to analyze these carefully and seem to notice every tiny detail. However, they are not able (?) patient enough (?) to do this with text. They seem to be missing even the most obvious examples of bias or biased interpretations. Is this a function of reading comprehension, or am I making a judgment too early? I even noticed that they were more thorough with the broadside. Perhaps this is because it was in its original form. Even with the broadside, they focused on the visual aspects rather than on the content of the text (see student observations). This is a challenge that I will need to overcome.

(Journal, 1-15-03)

Although they struggled to see the specific differences between the various documents, they did seem to comprehend the bigger purpose of the assignment that history is an interpretation of the past with a good deal of guidance and teacher-directed discussion. I pointed out that there are differences in the language of the various texts that might lead them to the conclusion that history can be painted in different ways depending upon the bias of the author, the inclusion of detail, the research of the historian, and the use of primary sources. This can be illustrated by a class discussion in which we carefully compared the two earlier described conflicting accounts of the Boston Massacre from two texts written about 20 years apart. I was keying the students into the description of colonists “throwing snowballs” in the older text, with a more recent excerpt that describes colonist with “sticks” and “clubs.”

Me: What does this tell you about textbooks?

Antonio: They all have different perspectives and points of view.

Me: Do you ever think that your textbook maybe isn’t telling you everything?

Kiki: I just wanted to say that sometimes some of the old time books aren’t as good as the newer ones because we’re still finding out today about things that happened hundreds or thousands of years ago.

I later summarized: “My purpose in doing this with you today is to show you that everything you read, you must read with a critical eye. You must ask yourself, is this really what happened? Are these really the events that took place?”

As we concluded this first foray in historiography and investigative work, I informed the students that we would soon begin our first investigation using the content of their U.S. history curriculum. I explained that for each investigation, we would use an Investigative Work Form (see Appendix E) that would help to guide their analysis of primary source documents. Prior to seeing this form, I asked the students to predict what characteristics such a form might entail. They were to draw upon what we had learned thus far in the class. Their list included the following, which proves to be a fairly close match to the actual tool that we used.

Figure 4.5. Students' List of Categories for the Investigative Work Form

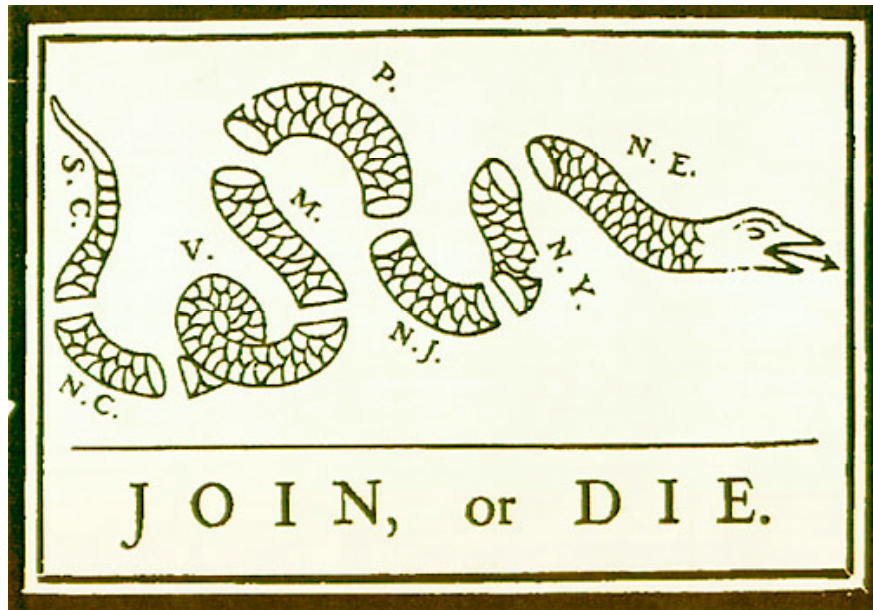
- | | |
|--------------------|-----------------------|
| • Date | • Writing Style |
| • Author | • Places |
| • Important Events | • Why written? |
| • Names | • Physical Appearance |
| • Captions | • Place of Origin |
| • Opinions/Bias | |

Investigation 2 – The Articles of Confederation: Success and a Failure?

Our first full investigation using content from the Constitutional Period unit began with the Articles of Confederation. After passing out the Document Files, the student's first task was to look through the documents and organize them in some manner. The students were given the options of organizing by type of artifact, date, or topic theme, with most deciding to organize these chronologically. I then decided to model the process

of analyzing sources by beginning with a Benjamin Franklin (1754) cartoon entitled “Join or Die,” that was produced to influence states to join together as a part of the Albany Plan of Union, 1754 (see Figure 4.6). We worked through the Investigative Work Form as a group, analyzing the cartoon and developing an interpretation as a class.

Figure 4.6. Benjamin Franklin Cartoon: Join or Die



Source: Library of Congress

I then let the students begin the analysis of the documents and images in their Document Files. The purpose of all of this was to provide the students with sufficient information to develop interpretations and to make connections between sources to respond to the original investigative question, which was “How do historians investigate the past?” However, I later noted in my journal that this proved rather difficult for them: “I am not sure that the students see the connection between the investigative work forms, the relationships among various documents, and the investigative question. They tend to

see these as separate and distinct assignments, and not related to each other” (Journal, 2-2-03). The students also seemed reluctant to make claims or to take risks, another key theme emerging from the study that I elaborate upon further below.

Each of the groups’ document files was the same for this investigation. They contained a political cartoon, a congressional resolution on slavery in the Northwest Territories, quotes from George Washington and Daniel Webster, a letter from George Washington to a general attempting to put down Shays’ Rebellion, a painting of Daniel Boone leading settlers through the Cumberland Gap, the Northwest Ordinance, a diagram explaining the demarcation of public lands under the Ordinance, some summaries of key events written by me, a summary of the Articles of Confederation, and a map of American lands after the Revolutionary War. I recognize now that this was too much information for the students to make sense of with the unstructured format I had chosen. This overabundance of data may account for the incomplete results of the Investigative Work Forms and their apprehension in making claims. For future investigations, I limited the number of documents any single group was required to analyze.

After sorting through the various documents in the packet, the students developed t-charts in which they wrote statements that illustrated both the strengths and weaknesses of the Articles of Confederation. Under each statement, they were to cite the sources that justified their claim. They recorded this on large chart paper and presented their ideas to the rest of the class, who were encouraged to question the claims and the evidence used. In general, the groups were able to identify key strengths and weaknesses. However, they tended to misread the intentions of some of the sources, which I had to clarify for them by carefully reviewing the text. For example, one of the groups thought that the

Congressional Resolution under the Confederation Congress that outlawed slavery in western lands unclaimed by any of the original thirteen states meant that slavery was to be abolished. I pointed out to them that this only applied to the particular circumstances of new lands under this act, and did not affect the existing slavery laws in the original states.

This event helped me to understand the difficulties that my students continued to have with primary source documents, and how easily it was for them to misread the text. It was also clear to me how important it is to make certain that students understand important historical context before they engage in reading these types of sources. An understanding of the surrounding historical events, limiting the number, length and sophistication of the documents, and careful scaffolding by the teacher throughout the investigative process proved to be the best ways to cultivate more careful interpretations.

Investigations 3 and 4 – The Constitutional Convention

The next investigation involved determining which factors made the task of forming a different government so difficult for the delegates at the Constitutional Convention. I ultimately combined this with Investigation 4, which focused on the various compromises necessary for reaching consensus on the new government, as one investigation led nicely into the next¹. I began on February 6 by setting the context through the use of a journal question, providing the students with some background information on the Second Continental Congress, and by reading some quotes from several of the delegates. I led this into a group investigation into the issue of large versus

¹ As this investigation became the model for subsequent ones, I have included a complete compendium of the materials used in Appendix F.

small states and representation in Congress. My intent was to model the investigative process as a large group so that they could then work as smaller groups to interpret other differences and issues of conflict at the Convention.

I first asked the students to respond to a journal question: “Why is it important to count people?” The purpose of this question was to help students see the significance of population in the structure of our government and how this became one of the important issues that made the task of forming a government so difficult. I also asked them to consider the issue of who a “person” is, and how some of the delegates may have had a different idea about this than we do today. Again, I was trying to foreshadow some of the key issues of the convention, this time by setting up a context for the issue of how to count enslaved people.

We then discussed some background ideas about the convention. I previewed some potentially difficult terms they would encounter in the primary source readings, and presented the key issues that we would be investigating. Next, I asked the students to analyze some quotes from various delegates during the convention proceedings, explaining that we have these quotes from notes taken by James Madison at the Convention. Mark asked, “How do we know that James Madison’s quotes were accurate?” I first complimented him on this question, then responded by saying that although we do not know this for certain, much of what he wrote has been corroborated through other sources. I could see that some of the students were beginning to question the reliability of sources, and thus thinking like historians as they tried to understand the past.

After looking at some population charts of the various states, we began to analyze a series of quotes surrounding the issue of representation by either state or population. I gave them three quotes, each of which we analyzed as a whole group. The first quote was from Delaware delegate Gunning Bedford, the second two were from Pennsylvanians Benjamin Franklin and James Wilson. The quotes by Bedford and Wilson each advocated for a system of representation that best suited the sizes of their respective states, while Franklin's quote summed up the arguments of both points of view. They seemed to lack a full understanding of the meanings of these quotes, as I struggled to help them develop an accurate analysis through the class discussion. They focused on the literal meanings of the words, rather than the contextual meanings for the larger issues dominating the Convention.

At one point during this discussion, I was explaining that Benjamin Franklin was considered the "old wise man" of the Convention. During this discussion, an African-American student named Jerrold said, "Who cares?" This appeared rude to me, but also an eye-opener. I wondered: What is Franklin's relevance to him over 200 years later? I realized that this lesson was a bit too teacher-directed and relied too heavily on the use of extensive text. I also recognized the need to slow down and to break up such difficult readings into smaller, more manageable chunks.

I decided to take advantage of the student's interest with visual images to retool this context-setting part of the investigation. For the next lesson in this investigation, I began by showing them pictures of some of the key delegates, a photograph of the restored Independence Hall, and two paintings of the convention proceedings. I also chose to revisit the Franklin quote (see below), which so articulately summed up the

argument of proportional versus state representation in Congress. As I stated to them, “I want to begin the class by going back to that quote from Ben Franklin. I went home after class and I felt like I rushed you through this.” I next reviewed two key terms associated with the quote: republic and proportional.

The diversity of opinions turns on two points. If a proportional representation takes place, the small States contend that their liberties will be in danger. If an equality of votes is to be put in its place, the large states say their money will be in danger. When a broad table is to be made, and the edges of planks do not fit, the artist takes a little from both, and makes a good joint. In like manner here both sides must part with some of their demands, in order that they may join in some accommodating proposition. (Franklin, 1791).

In their journals, they were then to analyze the quote in three parts. Here is their assignment:

In your Journals:

“Analysis of Ben Franklin Quote”

1. What does the term “proportional representation” mean in this sentence?
 - *Skip 5-6 lines --*
2. What does the term “equality of votes” mean in this sentence?
 - *Skip 5-6 lines --*
3. What is he saying in the last 2 sentences?

I then explained that this was an independent activity, and that I wanted them to

demonstrate their thinking on paper so that I could see that they understood. Each student then received a copy of the quote (see above) and was given five to eight minutes to respond in their journals.

The ensuing discussion was to be a turning point in my understandings about the use of difficult primary source text with my students. By breaking the long Franklin quote into manageable chunks, and by leading them through each part by asking them to analyze each individually, their understandings were more thorough. This can be shown by examining several students' journal responses to part one of the quote – "What does the term 'proportional representation' mean in this sentence?"

Mark: He means if they say how populated a country [state] is, and give them the power, it wouldn't be fair to the little states.

Tabitha: If everyone votes, the smaller states rights are in danger because the larger states with larger populations will out-vote them.

Shantel: It means that the small states will lose their freedoms because the states with more people will have more say in government.

In order to set the context for our examination of the issue of slavery, we spent a good deal of time analyzing a painting of the delegates to the Constitutional Convention at Independence Hall, and determining that this was not a fair representation of the American populace when compared to some demographic data in their Document Files. From our discussion, they concluded about the people in the painting that: "all were men; all were white; most were probably wealthy; most were probably professional; most were probably educated; some probably had slaves." This seemed to energize the class, as we

began to uncover the inequities that plagued this initial attempt to form our national government. As I summed up our discussion, “These men were not like most people in the colonies at this time. How might this have influenced the kinds of decisions that they made at the Convention?” Brent replied, “They made sure the laws were good for them.” Kiki added, “They maybe gave only certain people rights. People who were like them.”

We examined another painting of the Convention painted later than the first. In this perspective, George Washington is portrayed in a more regal or kingly pose (see Figure 4.7). This led to a discussion about how this might not be what Washington would have wanted, given our understandings about how the colonists viewed English royalty based on the various sources we had previously examined. We also revisited the subject of author perspective and bias.

Figure 4.7. Signing of the Constitution



Source: Library of Congress

For the remainder of this investigation, I also developed a pattern that I applied to each subsequent one. I broke down the investigative question into subparts, with each group responsible for a part of the overall investigation. I also decided to break down the primary sources into more manageable parts. I used carefully selected quotes from the Convention, combined with the usual assortment of visual images, maps of the period, political cartoons, and charts showing population patterns. As I stated to the class, “I changed things around a little bit. I felt like I was giving you guys too many things to read and it was getting confusing for the groups.”

The topics assigned to the groups were: (a) Slavery and Proportional Representation, (b) Slavery and the Declaration of Independence, and (c) The Power of the Chief Executive and How to Choose One. In their Document Files were charts and maps showing percentages of slaves by state, political cartoons, a list of all of the delegates and their states of origin, a copy of the first paragraph from the Declaration of Independence, the original act by Congress under the Articles of Confederation calling for delegates from each state to attend the convention, and selected quotes related to each of the group topics (See Figure 4.8 for a sample of these artifacts). The quotes I selected were short and grouped by topic, and came directly from the notes of James Madison.

I also gave each group not only the responsibility for framing the problem, but also for developing a “resolution” of how to solve this in the development of the new Constitution. They were then to write an essay in which they compared their resolutions to the actual ones developed by the delegates as explained in their textbooks, effectively allowing me to combine two investigative questions. The question was: “Based on the

reading in your textbook, how does your analysis of the issue and recommended solution compare to what actually occurred?” Although this proved particularly challenging for those students with limited English proficiency, it did provide an opportunity for the students to demonstrate their understandings about these rather complex issues, and I was pleased with their work overall. Mary provided a particularly thoughtful response about the issue of the Three-Fifths Compromise:

Mary: My group came up with the conclusion that some large populations may contain a high percentage of slaves, which results in them not being able to vote because their [sic] not citizens...Our group came up with the conclusion that slaves [should] be able to vote or count a certain amount of the population.

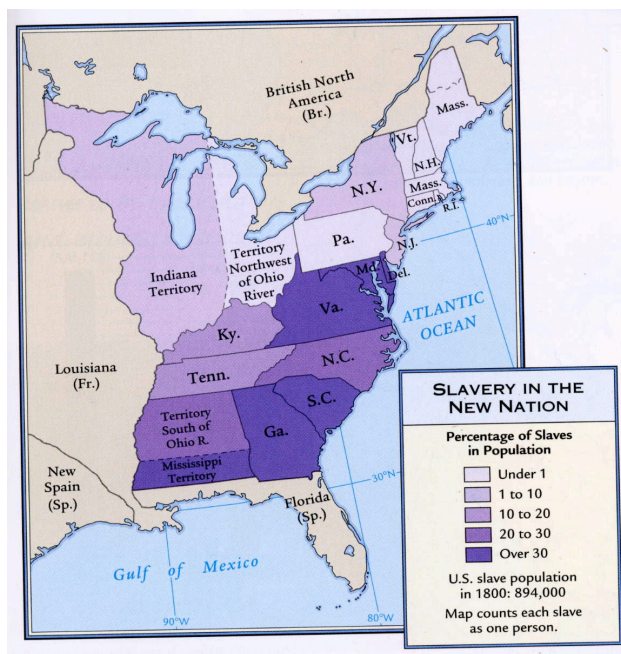
Mark’s description also demonstrated that he understood the key issues surrounding the so-called “Great Compromise,” that bridged differences between the small and the large states in terms of congressional representation:

Mark: My group and I made a solution that was exactly like the Virginia Plan. Our solution was similar because we felt that larger, more populated states should get three representatives and the smaller ones should get two representatives. The only difference between the classes’ resolution and Viola’s description of what happened was that the Convention came to a compromise. They divided the Congress into a House of Representatives and a Senate.

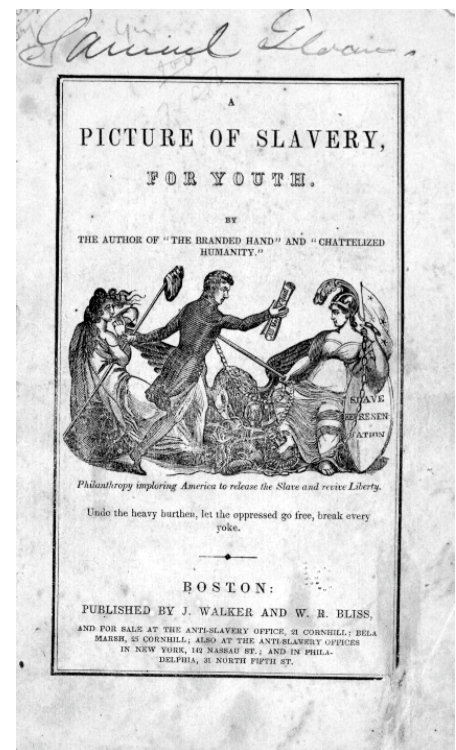
Figure 4.8. Sample of Artifacts used for Investigative Question 3

Population by State, 1790												
New England (Including Vermont)				Middle			Southern (Total Including Fla)					
1,009,408				958,632			1,851,806					
Conn.	Mass	NH	RI	New York	New Jersey	Penn	Del	Geo.	MD	N Car.	S Car.	VA
237,946	475,327	141,885	68,825	340,120	184,139	434,373	59,096	249,073	319,728	393,751	249,073	747,610

Source: *Historical Statistics of the United States: Colonial Times to 1957*



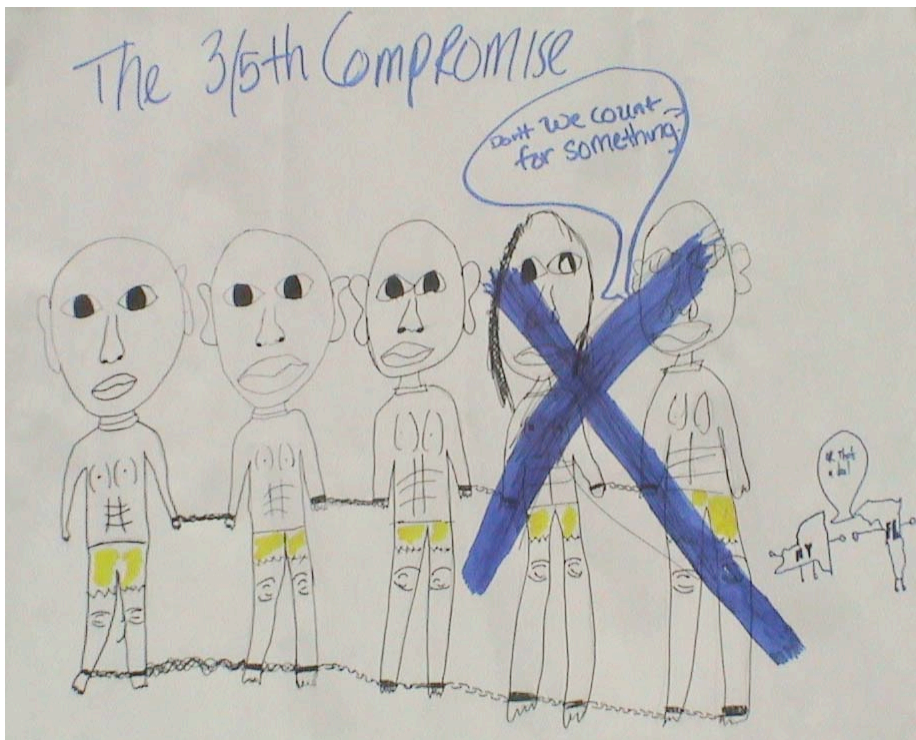
Source: *The Nystrom Atlas of United States History*



Source: *Library of Congress*

Finally, the groups presented the real solutions developed by the delegates to the class in the form of a chart-sized editorial cartoon (see Figure 4.8). For this assignment, I included the issues that the students were charged with investigating, along with the Great Compromise, compromises on taxes, and both the New Jersey and Virginia Plans. We then discussed how these real solutions were both similar and different from their proposed solutions. The students who worked on the Three-Fifth's Compromise acknowledged that their solution was unlike the actual one, which seemed “unfair” and “cruel” to them. Despite this reaction, the students seemed to empathize with the decisions of the delegates. Jerrold added, “It was better than not counting them at all.” Shantel concluded, “Well, at least they counted them for something.”

Figure 4.9. Student-Produced Editorial Cartoon on 3/5th Compromise



Investigation 5 -- Ratifying the Constitution

This investigation was followed by one in which the students were to examine the nature of the arguments for and against ratification of the Constitution. On March 13, we began by setting the context for the investigation with another quote from Franklin (1787) that ends with, “But now at length I have the happiness to know that it is a rising and not a setting sun.” Drawing from earlier experiences with reading primary source documents written by the Convention delegates, I again broke the quote into chunks and had the students analyze the various parts of the statement. They did well with this and were able to rephrase Franklin’s metaphorical prose into language that they could understand. Margaret’s response represents one of the more articulate of those written by the class: “The statement means that the sun is the U.S. and the new government and they are rising above the difficulties and are rising to live yet another day.”

This was followed by an activity in which the students were to examine a tally sheet drawn by Thomas Jefferson showing a vote about ratification (see Figure 4.10). I removed any obvious references to the nature of the tally sheet, and gave the students 4 minutes to analyze the chart with the intent of determining the purpose of this document.

Figure 4.10. Jefferson's Vote Tally for Ratification

Arti- cles	Affirmative				Negative		
	Yes	No	Abstain	S.C.	No	Abstain	S.C.
I.	Y	N	A	S.C.			
II.	Y	N	A	S.C.			
III.	Y	N	A	S.C.			
IV.	Y	N	A	S.C.			
V.	Y	N	A	S.C.			
VI.	Y	N	A	S.C.			
VII.	Y	N	A	S.C.			
VIII.	Y	N	A	S.C.			
IX.	Y	N	A	S.C.			
X.	Y	N	A	S.C.			
XI.	Y	N	A	S.C.			
XII.	Y	N	A	S.C.			

Source: Library of Congress

I recorded their responses, which were interestingly perceptive. They effectively determined that this was a vote about whether states wanted the Constitution, and that not all the states agreed. Here is a list of their ideas:

- To see whether the states wanted the Constitution.
- The states were voting.
- They were voting on the different articles of the Constitution. This column (first) shows the articles, and this column says the states.
- The vote is about Articles 1 and 2.
- Some states are missing.

For the remainder of the class and as a homework assignment, I asked the students to read a summary of the arguments of the Federalists and the Anti-federalists

and record their observations on a chart that each student was to complete. At the beginning of the next class, I informed them that they would be engaging in a class debate as the culminating activity of this investigation. They were given 40 minutes to prepare for a debate. I divided the class into two sides by doing a random 1-2 count-off. On one side were the Federalists, and on the other were the Anti-Federalists. They used their charts to prepare for the debate. They were allowed one opening statement each (2 minutes maximum), and one prepared rebuttal (2 minutes maximum). Afterward, each person had an opportunity to respond at any time, going back and forth between sides.

The students appeared to thoroughly enjoy this exercise. I was a bit worried because I had left things a bit open-ended and unstructured, but the students responded well. They wanted to divide the room so that two sets of chairs faced each other. One team focused on selecting quotes and developing statements. The other group was more interested in theatrics – using makeshift props (Pamela’s briefcase), and drama (entrance into the room as if they were attorneys entering a courtroom). The debate was lively and well articulated considering the limited preparation time. What was most impressive to me was the fact that each group made an effort to see that everyone contributed. Even the students with the most limited English proficiency, and who rarely spoke in class, made comments as a result of encouragement from their peers.

Shantel began by outlining the importance of a strong central government to correct the problems created under the Articles of Confederation. Brent countered by reminding the group of the tyranny the colonies endured under British rule, and the need to limit authority. After these opening statements, each team was allowed a rebuttal. Andruw, a recent immigrant from Venezuela who was receiving English-speakers-of-

other-languages (ESOL) services, was the first to speak. “The Federalists said we need a strong government or will not be able to defend.” Mark attempted to help clarify his team member’s comments by adding, “He is saying that they, the colonies, needed a way to defend themselves from the British troops, and they could never do that before.”

Representing the Anti-Federalists, Brent countered emphatically, “Now that we are free, we are going to do the same thing we broke away from?” This pattern was repeated throughout, with the Federalists relying on using evidence to support their arguments, while the Anti-Federalists resorted to the use of language and enthusiasm to make their points.

The banter continued with two additional ESOL students -- Zeke and Deng -- contributing from the Federalists with encouragement from the group leader Shantel:

MS: OK, anyone else? Yes, Zeke.

Shantel: Yeah. OK, he has something to say.

Zeke: The colonial government is so weak that other nations do not want to make any treaties with us. So we need a strong government.

MS: Rebuttal on the other side? Mary?

Mary: Why are you guys going to say “We the people” when everyone doesn’t agree? Why should we say “We the people” if only the states agree and not all the people?

MS: Other side? Deng, you’re up.

Deng: What more do we say, “We the people?” To make a state, the people have to be there. How much difference is there? The two are the same.

Shantel: Go on!

MS: Next? Tabitha?

Tabitha: If all of these rich folks get all the money and power, then they'll just swallow up the rest of us like Jonan...what was his name?

(laughter) Oh, Jonah. When Jonah got swallowed by the whale...

Investigation 6 -- Constitution as a Blueprint

As the final investigation, I wanted the students to see the connection between the Constitution and their lives in modern America. We began on March 23, first examining the structure of the document and the meanings of the articles and original 10 amendments. Next, we launched into what would prove to be their most challenging investigation. Using the Constitution itself as the primary source, I provided the students with a variety of additional documents and images such as news articles, Congressional reports, summaries of court cases, a State of the Union address, pictures, and political cartoons. They were to make connections between these artifacts and the Constitution, and show the connections by citing the Article, Section, and Clause, or the specific amendment to which each document relates. They struggled to see the relationship between the artifacts and the Constitution, as I needed to provide considerable assistance and guidance connecting them.

Students continued to have difficulty with this assignment, as I should have anticipated given prior experiences. The primary document they were using was long and difficult to read (the entire Constitution), and they were also given 14 additional artifacts that they needed to sort through in order to make connections to the Constitution. This

activity again showed that, even with prior practice, long and difficult primary source texts need to be broken into more manageable chunks, and that students continued to get confused if given too many documents to examine at any one time.

I certainly might have expected all of this, but I found that I was trying to expedite the investigation prematurely. I had been encouraged by the progress my students made and decided to move the class forward more quickly because I had promised Pamela that I would leave her students in the agreed upon place in the curriculum. I needed to get through this last topic quickly and suffered the consequences by failing to learn from my earlier experiences. This illustrates the issues of pacing with which any teacher who uses such an inquiry approach must grapple. How does one balance the need to move briskly through a crowded curriculum with an instructional method that requires such careful planning and patience? All of which leads to further questions about this teaching method that I will explore further in what follows.

Summary

My experience teaching United States history to this diverse group of eighth graders allowed me to see first hand the challenges of using a historical investigation approach. I came to recognize the planning difficulties of finding multiple sources that were both linked to the content of the unit and developmentally appropriate. The overwhelming availability of materials posed as much of a challenge as the complex and difficult content of the unit chosen for the study. I found that I needed to carefully select text that was both meaningful and manageable, and to incorporate visual images in an effort to maximize student comprehension and interest. Pacing is an issue that might

emerge for teachers as they use such an approach, but by linking the learning outcomes of each investigation to the content in the curriculum, a regular curriculum pace can be maintained if teachers keep in mind that students can get easily overwhelmed by long and difficult documents. By transforming curriculum objectives into a series of investigative questions and by restricting the number and length of the documents used, I was able to maintain the curricular content of the course. A collaborative learning approach to these investigations allowed the students to work as teams in solving the historical problems I posed. This also lessened the anxiety of working with many documents simultaneously. Finally, I found that by making relevant connections between their lives and the content of the curriculum, and by focusing on issues of fairness and equity, my students were more motivated to understand the content. In the next chapter, I focus on data related to my students' ability to learn history using a historical investigation method of teaching.

CHAPTER 5

AN ANALYSIS OF STUDENT LEARNING

Introduction

Earlier, I detailed four questions that formed the key research parameters of this study on the use of a historical investigations approach to teaching United States history to a group of eighth graders:

1. Can such alternative methods for the teaching of history be realized in an educational environment that often ties reforms to an increasing reliance on standards and assessment?
2. In what ways does a teacher resolve the potential conflict between coverage demands and alternative teaching approaches as they teach history using a *historical-investigation* approach to instruction?
3. As a result of this instruction, will students understand history in more complex ways than they would if a traditional lecture/storytelling/coverage approach was used?
4. What are the variables that will influence the successful implementation of a historical-investigation model by classroom teachers?

In this chapter, I detail results of the study by examining the third question in the context of my classroom experiences with Pamela Burke's second-period students. The focus will be to interpret the manner in which students learned about history based on a range of data. In doing this study, I was able to see more clearly the relationships between teaching history and the current state of learning among students as represented in this diverse classroom. I return to analyze and discuss the first, second, and fourth research

questions in Chapter 6, in the context of my experience as a teacher using a historical-investigations approach.

The process of interpretation that I will use is based on the development of themes linked to the data. Data will come from a wide range of sources, including student interviews, teacher interviews, student writing, the Interest and Motivation Survey, student and teacher comments and dialogue during class instruction, student and teacher journal entries, and student thoughts about reading as expressed in the Think Aloud Protocol interviews. I will group these data around the themes, and develop assertions about the results that will serve to summarize the key ideas of the study. I will begin with a summary and analysis of the data from student classroom discourse and assignments.

Data from Student Classroom Discourse and Assignments

In the previous chapter, I detailed the classroom experiences as they transpired over the two and one-half months that I taught United States History to the students in period A2. Throughout this time, my students learned a great deal about the time period surrounding the development of our Constitution, and also developed their historical thinking and interpretation skills. To illustrate this, I will draw from classroom discourse among the students and myself, as well as from the various assignments they completed as a part of the class. Much of this data is present in the examples shared earlier in the descriptions of classroom experience in Chapter 4, some of which I will revisit in the summary that follows.

A historical investigations approach to teaching has convinced me that students can learn about both the content of history and the tools and processes that historians use

to interpret the past. As I will detail later in the analysis of my teaching, I was concerned that the students were not always learning the same content as students in other classes whose teachers were using secondary textual sources to achieve curriculum objectives. While this might be true, this is also likely true of any history classes taught by different teachers. Depending upon which resources the teacher chooses to use, time spend on specific content, or the effectiveness of the instruction in helping students to learn, the content that students learn might be quite different from one teacher to the next. What I consider to be most important in student learning of curriculum objectives centers on their understanding of the key ideas and concepts in the broad sense. Did students comprehend the “big ideas” of the unit of study? I will next examine the data from my study in this context of student learning.

Investigations 3 and 4 that focused on the events surrounding the Constitutional Convention provides a window into the kinds of content understandings that my students learned through a historical investigations approach. These two investigations (combined into one) were developed around two key questions. First, what factors that led to differences among the delegates made the task of forming a new government so difficult. One of the “big ideas” of this investigation was the notion of a bicameral congress as a solution to the large versus small states issue that proved divisive during the Convention proceedings. I had the students examine several quotes from delegates to develop an understanding of the essential arguments of both sides. After examining a quote from Benjamin Franklin, it was apparent that the students were able to articulate their understandings of the notion of proportional representation in their written journal responses (see p. 89 for more examples and a full description). Amber said, “I think that

‘proportional representation’ means if they divide representations then the small states say that their liberties will be in danger.” In responding to the notion of “equality of votes,” Sharon summarized Franklin’s quote: “It means that if every state gets equal votes, the bigger states lose power.” When asked to explain what Franklin meant with his carpentry metaphor (see p. 88) Jerrold replied: “That there may be differences in opinions and that you should hear both sides in order to form a success (compromise).”

Further into these investigations, we studied images of the signing of the Constitution. I led the students through class discussions about the delegates who represented the various states at the Convention. Reminiscent of Charles Beard’s interpretations (Beard, 1935), the students drew the conclusions that the delegates were men, white, probably wealthy, probably professionals, probably educated, and some probably owned slaves. When asked what this might have meant in the framing of the document, the students replied that the men were likely to develop laws that were beneficial to people “like them” (see pp. 89-90 for a fuller description of this discourse).

The second key question in this investigation focused on the compromises of the Convention. A group whose responsibility it was to examine the issue of slavery and proportional representation compared their initial predictions about a possible solution to the problem with a description by historian Herman Viola (p. 244, 1998) about the ultimate compromise by the delegates. Rob’s analysis showed that his group had not only understood the essential arguments, but why the delegates decided upon the Three-Fifths Compromise:

Rob: Our group agreed with the choices made by the delegates. We agreed that they count the slaves as something rather than nothing. Our resolution was

good because it agreed with the delegates. I believe the delegates did it like this so that there was no conflict between the Northern and Southern colonies. Each state got a part of what they wanted.

In addition to the examples of content understandings, my students also developed knowledge about the process of historiography throughout this study. At the end of our very first investigation about how historians investigate the past, I asked my students to make a list of categories that they thought we should include in our analysis of documents for future investigations. This list (see p. 82) demonstrates that they developed an initial understanding of the tools historians use to analyze and interpret documents, as this was very similar to the one that I had already developed for the class. This was further demonstrated as the students began to question the authenticity of sources (see Mark's comments on p. 86) and the inequalities inherent in both the make-up of the delegates and the failures among these delegates to resolve the issue of slavery at this pivotal moment in our nation's history. The students also showed that they began to internalize a different view of looking at history through their pre and post journal responses to the statement "History is..." (as I will demonstrate later).

Throughout Chapter 4, and in the examples provided in this section, I demonstrate that the students in period A2 developed reasonably deep understandings of the content surrounding the Constitutional period of American history. These understandings were likely different – and one might conclude more sophisticated -- than they would have been had they simply completed textbook readings and listened to my interpretations of this historical period. By constructing an understanding of the past through their own

interpretations of primary source documents, images, maps, and other forms of data, my students were able to develop a sense of ownership of their knowledge. Unless students are invited to think historically and are taught to engage in the process, their knowledge is likely to be shallow and quickly forgotten. Deep historical content understandings are not likely to occur without the capacity to think historically, as it is the historical thinking process itself that enables these understandings. Studying and then recalling facts, dates, and names do not constitute this end.

These data from classroom discourse and student assignments, combined with the descriptions in Chapter 4, provide evidence to support the claim that my students were learning the content of United States history with a steady diet of learning about and using investigative thinking tools to study the events of the past. Generally speaking, these results point to the power of the investigative approach to deepen students understandings of America's past, especially against the backdrop of the disappointing results that continue to surface in the results of national testing in American history (NCES, 2004a; NCES 2004b). As I will explain in the sections that follow, I collected additional data that need to be considered before any further conclusions can be drawn.

Interest and Motivation Survey

The interest and motivation survey was conducted at the beginning and end of the study in a pre/post design. Based on a survey by Wigfield, Guthrie, and Mc Gough (1996), this survey was designed to determine interest and motivation in history.¹ Additional items were added to determine reading difficulty, and changes in student

¹ For a complete copy of the survey questions and its results, see Appendix C.

perceptions about history. In a column next to each item, students circled a number from one through four. A “1” represented the statement “very different from me,” a “2” represented the statement “a little different from me,” a “3” represented the statement “a little like me,” and a “4” represented the statement “a lot like me.”

Due to 2 invalid surveys, and mobility in and out of the class, there were 16 students out of the original 18 who completed both surveys and who were in the class during the entire study. I lay out the data in a descriptive fashion (see Appendix C), comparing mean scores on each item for pre- and post-administration of the survey. I will next describe and analyze the results of those items that showed the largest differences.

Most items showed only slight change, but there are several individual items that may be considered important, particularly when compared with other results in this study. Item 20, indicated a drop in student confidence in their capacities to decode vocabulary in history text. This result may be considered to be important in that average score went from 2.1 to 3.38 (+1.28, or “more like me”) when asked if “I find the vocabulary terms in history to be difficult.” When compared to the general assertion that students struggled with comprehension when reading the primary source documents used in this study, this result seems to offer confirmation. There was also a decline from 2.19 to 1.81 (-.38) when students were asked to respond to the item “I like reading books about history.” These results may be linked to the general difficulties that students experienced with the primary source text when compared to the more age-appropriate secondary source text used prior to the study.

When asked to respond to the statement, “I like hearing the teacher say that I am good at history,” student scores went from an average of 1.94 to 3.06 (+1.12, or “more

like me”). This could be linked to my overt attempts throughout the study to reinforce the ideas of the students to show them that they could interpret history as a historian might. This also could be seen as a reflection of my overall intention to create a community of learners in the classroom who supported each other in their efforts to learn history. This result might be linked to the statement indicating that the students liked the manner in which history was taught throughout the study when compared to their prior experiences.

When asked to respond to the statement, “I think history is like a detective story,” students went from an average score of 2.31 to 2.88 (+ .57, or “more like me”). This statement is an obvious link to the historical investigations approach used in the study, and may indicate that the students internalized the notion that history must be viewed as an interpretation of past events about which historians used evidence to reach their conclusions. When linked to other results in the study, this may indicate that students began to see history less as a set of unquestioned truths and more as a series of events subject to interpretation.

There is potentially disconfirming evidence in the survey about the notion that students see history more as an interpretation of the past than as a set of facts. The survey also revealed an increase in student responses to the statement “I think there is usually a simple answer to questions about history.” The average score to this item increased from 2.19 to 2.63 (+ .45, or “more like me”). Part of the intent of my work with the students was to show that history is a rather complex series of events, personalities and circumstances that must be analyzed and interpreted. Perhaps my method of “packaging” each investigation with carefully selected materials for the students led them to believe that history is rather easily interpreted. As they were not involved in the selection of the

most pertinent materials due to the time it takes to collect those materials, they might have seen such investigations as simply a matter of analyzing a few documents, statistics, and graphic images that are easily accessible. However, in some sense this seems counter intuitive to students' general assessment that reading and assessing documents tended to grow in difficulty.

I was also surprised to see that my students seemed to think that history was more boring after the study than they did prior to their experience with me. There was an increase from 2.75 to 3.13 (+.38) when asked to respond to the statement "I think history is boring." Perhaps they failed to see what I was doing with them as "history" in the sense that they understood it to mean, for the historical investigations approach was probably unlike the history they had known in their classes before. Nonetheless, this remains a curious response in light of the fact that in class, most of the students much of the time appeared deeply engaged in the investigative activities I invited them to participate in.

Emergent Themes

I organize the remainder of this chapter around three themes that emerged in the analysis of the other data collected during the study. These themes are labeled *Shifting the Culture of Learning*, *Reading Primary Sources*, and *Historical Understandings*. Data for these themes and their accompanying assertions come from a range of sources, including the Interest and Motivation Survey described above, interviews, and classroom events.

Shifting the Culture of Learning

As I noted earlier, much has been written over the past decade or so about teaching and learning history. While this research helped to inform this study, there has been little of this research that has involved the deployment of instructional strategies with children in real classroom situations, with the exception of Van Sledright (2002) and Wilson (1990). My experiences in conducting this study provide a relatively rare glimpse into the practical application of such strategies.

By their own admissions, the students in this class had previously learned history in a very different manner than they experienced with me as their teacher. As researchers have noted, history instruction is typically pedantic, dry, and textbook-driven (Ravitch and Finn, 1987; Shaver, Davis and Helburn, 1980). Through interviews completed after the study and in their journals, the students described how they saw this experience as very different than prior history classes. Consider this interview conversation with Mark:

MS: In what ways was learning history different when I taught your class.

Compare this to some of the other learning experiences you've had.

Mark: Usually, you just kind of sit there and read a book, but you made it more hands-on and you can remember things easier.

MS: So you remember things better when you actually do them?

Mark: Yeah. Instead of just sitting there reading a book. I don't think you learn as good as when you have a more hands-on experience.

Amber had a similar observation:

MS: Describe what it was like learning history when I taught your class.

Amber: Um, it was fun. Because we got to do investigations and actually know, like work through the documents—instead of just reading a book.

While Kiki was a bit more direct:

M: If you were to give some advice to history teachers, what would it be?

Kiki: Get rid of the dry textbooks please! If we had a more interesting way to learn, we'd probably pay attention more.

In his journal, Jerrold also noted how the class was different from others he had experienced:

We to had to do debates and make presentations about what our group has done. We also had to do a lot of things on posters to express what we what we thought or felt about a specific subject. We also had to do very little homework, but when we did have homework, it was very challenging. We also did essays that we had to do based on other subjects. (Jerrold)

My interview with Pamela yielded a similar set of understandings. Pamela spent a considerable amount of time observing my class, and she noted how different the class was from how they had previously learned history. She was particularly struck by how individual students reacted to an investigative approach to history instruction:

Some kids, who I thought [pause] -- who all through the year had not been responsible at all doing rote assignments, I saw them kind of blossom in this atmosphere where they had to think. Like a child who actually does *no* [her emphasis] homework, who just does not respond to this traditional kind of work that I had been giving her. But in these assignments, she really had a lot to say,

she was more vocal, it just kind of brought out the best in that kind of kid. It also made me reflect on what I had been doing with them a lot. What kinds of activities have I been doing that I might do differently to give more opportunities to think? Maybe ask their opinions and let them draw more conclusions on their own.

These interviews supported my own observations over the course of the study. I saw that the students often lacked the confidence to make claims about their own interpretations. They were often frustrated because the answers were not obvious to them. As Pamela pointed out, “The students weren’t sure about their opinions. Even when they thought they had a good answer, when they thought their opinions were right, they questioned what they thought was correct or not. They were trying to give the ‘right answer’ instead of what they thought.”

I questioned her further on this issue, by asking her about why she thought it was so difficult for the students to draw conclusions based on the evidence they found. I asked, “Do you think it was really that difficult for them to do this?”

Not the task of doing it, but the confidence that they were doing it correctly. The skills were really not that difficult for them, but they needed the reassurance that they were going in the right direction, that they were correct. (Pamela)

This might be seen in the results of the pre and post interest and motivation survey. When asked to respond to the statement, “I like hearing the teacher say that I am good at history,” student ratings saw an important increase from an average of 1.94 to

3.06 (“more like me”) on a four-point scale. This could be linked to my attempts while teaching the students to reinforce the ideas they developed in order to show them that they could interpret history as a historian might. This also could be seen as a reflection of my overall intention to create a community of learners in the classroom who supported each other in their efforts to learn history by analyzing and interpreting it themselves. I recognized that helping my students gain confidence in their own ability to think about history in this manner was my responsibility. Through positive reinforcement and praise, and by showing them that their ideas often mirrored those of real historians, many of the students gradually accepted that they *could* learn to do this.

In addition to the fact that students had to adapt to a very different way of learning about history, they also found that my method of engaging them in investigations in cooperative groups was something they had not previously experienced. I found them to be rather resistant at first, as they were accustomed to working independently, with only occasional small group activities. VanSledright (2002) found the same sort of resistance in his study with fifth graders. Although our initial activity of brainstorming the qualities of an effective group demonstrated that although they knew how to work together, they were probably unprepared for the amount of cooperative work time in which I engaged them. My technique of having them work in investigative work groups for much of the time again challenged their paradigm of history classroom effort.

Although I had to rearrange some of the groups due to personality conflicts, they remained largely the same throughout the study. Despite their initial resistance, most of the students seemed to adjust well to working on their historical investigations as a team.

The post-study interviews bore out this observation that they saw the benefits of working in cooperative groups:

MS: I'd like you to describe what it was like learning history when I taught your class.

Kiki: We had to do some things [together] that I liked doing because sometimes I have trouble when I work alone. Especially with the projects, when I am easily confused. I like other people to point me in the right direction.

Mark added:

MS: What was it like for you working in the groups?

Mark: It was good because you could hear what they thought.

Amber, who perhaps complained the most in class about working with a group, later grudgingly concurred:

MS: What did you like about the class?

Amber: You know, even though I didn't always like it, there were times that I did like the group. Because sometimes it would help, and even when I didn't get it, they would get it. So then, there were other ideas there.

MS: Kind of like two heads are better than one? If you had to give some advice to history teachers, what would that be?

Amber: To work with their class to do investigations and to work with groups.

Because these are ways to help kids learn.

These comments also demonstrate that the students seemed to understand the benefits and needs of working together. When analyzing difficult text or comparing a

variety of textual sources with each other and with other artifacts such as visual images, maps, or graphics, they seemed to recognize that working with others deepened their understandings. This reflects the kind of community scholarship that is inherent in the domain of history. Seixas (1993) makes this parallel to professional historians when he discusses the notion of the classroom as a community of inquirers. The teacher takes on the role of facilitating this process and forming a bridge between the community of knowledge producers (historians) and the community of learners (students).

Jerrold's journal comments seem to summarize the student's feelings that, despite the fact that it was not always easy, working in cooperative groups was not only beneficial, but was part of the responsibility of all learners to help each other:

I remember when we were acting as if we were historians. We learned to work together as a group and looked at actual documents instead of looking in a textbook. We also had to fit everyone in and make everyone in the group feel as though they were group members. And we had to learn how to work with people at times even though we really didn't want to work with them. (Jerrold)

Pamela worried about this method, though. She expressed some concerns about the lack of individual accountability when the students were working in cooperative groups. "The ones who struggled were...the kids who refused to work and this kind of cooperative learning gives those kids more of a way out...Those kind of kids just shut off from time to time. They just blend in and kind of shut down."

I also noticed that there were some students who tended to sit back and allow the other members of the group to do most of the work. Lavol would often disrupt the group with comments that were unrelated to the topic at hand, but rarely contributed in a

positive manner unless I directed him to participate. Jake also tended to be non-participatory, but did so in a manner that was much less overt. He would often sink in his seat and almost try to disappear while his more assertive group members were working. In retrospect, I probably needed to have built in more accountability measures to ensure that all students participated more equally.

Thus, the culture of learning in this social studies classroom underwent a transformation over the course of the study. The teaching methods employed challenged the students' traditional perceptions of history classrooms, leading some to question the methods at first and others to fade into the background. Ms. Burke also found herself questioning the instructional strategies because she believed that they lacked accountability measures for students who chose not to engage. At the same time, many of the students and Ms. Burke saw the benefits of group problem solving around historical investigations. The students tended to appreciate being given ownership of the learning process and being allowed to work actively with the real documents and images of the past in a collaborative manner with their peers. Next, I detail the experiences of the students in reading primary source documents, a key theme that affected both the student's learning and my teaching over the course of the study.

Reading Primary Sources

I was interested in how my students read and interpreted primary sources throughout the course of the study. Each Investigation was based largely on the analysis and interpretation of primary source documents, the writings and statements of historical actors, statistical data, maps, and visual images. It was my belief that students could develop understandings about historical events by reading and analyzing these original

documents. This is in sharp contrast to traditional history classrooms where most learning is developed through the reading of secondary sources and through a teacher's interpretations of history as articulated by lecture and class discussion (Cuban, 1991; Davis, et al, 1980).

Although students tended to do well in their interpretations of visual images, they often struggled with written text. The primary sources I used in this study were carefully chosen for their relevance to the investigative question. I also attempted to find those sources or images that were particularly interesting or compelling, and that succinctly defined the issues under investigation. I found that portions of original written documents often worked better than the full selection because it allowed the students to focus on the text rather than become confused or intimidated by long, difficult passages. By providing the students with the most significant portions of text, and by combining this kind of written information with maps, statistical data, and images, students were able to develop a fairly sophisticated understanding of specific historical events (more on this development momentarily).

Throughout the course of this study, I found that students became more critical of secondary source text, and were less willing to accept these sources as unquestioned fact. I also saw that the students were more likely to focus on details related to sourcing documents, the existence of perspective, and on drawing conclusions based on the analysis and interpretation of evidence. In the next chapter, I describe more fully the challenges of using primary source text from my perspective as the classroom teacher. For now, I focus specifically on the results of the pre- and post- Think Aloud Protocol

interviews that I conducted with the primary informants of the study as a means of addressing student' readings and analyses of primary source accounts.

For each investigation, the students had to read written text as provided by historical actors. This was the one area that the students tended to struggle with the most, as these primary source documents were not written to conform to the reading capacities of most adolescents. In order to judge whether the students were able to read and analyze these historical documents with increased levels of sophistication, I engaged the four primary informants (as representative of the class) in a pre- and post- Think Aloud Protocol activity. This activity allowed me to analyze how students comprehended the text, and whether they were able to make sense of historical information in ways that pointed to deeper historical understandings.

In this activity, I asked the four students to read two conflicting historical accounts of the same historical content. They read the accounts aloud, stopping at pre-determined points to explain what they are thinking about as they read. The students – Antonio, Amber, Mark, and Kiki -- did this same activity with one set of documents at the beginning and another set at the end of the study, as a means of limiting a possible practice effect.

The first set of documents was related to the treatment of Native American women as described by two different historians. One account described how Native American men forced women to do most of the work, while the other, conflicting account explained that the workload between men and women was quite egalitarian. The second set contained two conflicting accounts of the Battle of Lexington Green – one by an American and one by a British officer (See Appendix D for the complete texts).

The entire process was audio taped and the student responses transcribed. The data were then coded using a process developed by Van Sledright (2002), who based his work initially on that of Pressley and Afflerbach (1995). The theoretical underpinnings of this coding process is described in Chapter 3. This process places student vocalizations in response to sections of text (as defined by distinct sentences attributed to student reactions) on a continuum based on the degree of sophistication with regard to both reading and historical understanding. Van Sledright places the more generic strategic reading strategies at one end of the continuum, and the more sophisticated, history-specific strategies at the other end. He labels Levels 1 and 2 “General reading practice,” and Levels 3 and 4 “History-specific strategic expertise” (p. 112). See the Table 5.1 as replicated from his study for a full description of each category.

The purpose of this scale is to evaluate student reading of historical text. The more basic levels (1 and 2) demonstrate the reading comprehension of textual passages. Level 1 shows that the reader is able to summarize, predict developments, and make some initial sense of the text. Level 2 shows that the reader is able to make judgments and evaluations of the text. The higher levels (3 and 4) are designed to evaluate whether the reader is able to demonstrate the application of historical thinking with respect to the documents. Level 3 shows that the reader is able to draw from accreting event knowledge to begin to make some initial historical applications such as identifying the author in sources, corroborating details across sources, and constructing initial interpretations. Level 4 shows that the reader is able to test and refine his or her interpretations by evaluating validity, reliability, subtext, and agent intentions to construct evidence-based interpretations of the event (Van Sledright 2002).

Table 5.1. Continuum of Reading Strategies

Continuum of Reading Strategies			
General reading practice		History-specific strategic expertise	
Level 1 Process: Using Comprehension Monitoring	Level 2 Process: Making Judgments and Evaluations	Level 3 Process: Drawing from Accreting Event Knowledge	Level 4 Process: Testing and Refining of Interpretation
<ul style="list-style-type: none"> • Reader checks details, rereads, summarizes, and/or predicts developments in the source • Reader can then make initial sense of source • Strategy: Intratextual analyses 	<ul style="list-style-type: none"> • Reader judges aspects of a source by indicating whether its various elements make sense, internally cohere, are palatable • Strategy: Intratextual evaluations 	<ul style="list-style-type: none"> • Reader acknowledges growing event knowledge • Identifies the authors in sources and corroborates details across sources • Uses growing knowledge from multiple sources to construct an initial interpretation of the events • Strategy: Intertextual analyses 	<ul style="list-style-type: none"> • Reader makes intertextual evaluations of the sources' validity, reliability, subtext, and agent intentions as a means of constructing a refined, evidence-based interpretation of the event • Strategy: Intertextually critical evaluations
* From Van Sledright (2002, p. 112). Derived from the work of Pressley and Afflerbach (1995).			

In his work with fifth graders using the Think Aloud Protocol reading analysis, VanSledright (2002) saw gains over the course of the study. VanSledright used a total of three documents and three images with eight primary informants in the first administration of the assessment tool at the beginning of the study. He recorded a total of 419 “vocalizations,” which he defined as a simple sentence unit produced by the students in the transcript. Of these 419 total vocalizations, he identified that 83% of the total were at levels 1 or 2, while 17% were at levels 3 or 4. The second administration of the assessment was completed at the end of the study, and involved four documents and 2

images. These same students completed 348 vocalizations, with 59% of the total at levels 1 and 2, and 41% at levels 3 and 4. This was an increase of 24% in the higher levels of response, demonstrating these fifth grade students became more sophisticated readers of historical text over the course of the study as defined by what it means to read and think historically about documents (Van Sledright, 2002).

Table 5.2. Think-Aloud Protocol Results December 2002

Think-Aloud Protocol Results December 2002								
Number of Vocalizations								
	Document 1 Analytic Level				Document 2 Analytic Level			
Student	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>
Mark	6	3	0	0	9	0	0	0
Amber	8	0	0	0	10	0	0	0
Kiki	5	4	0	0	6	2	0	0
Antonio	10	2	0	0	10	0	0	0
Totals	29	9	0	0	35	2	0	0

Total, all vocalizations: 75

Total, all levels 1 and 2 combined: 75 vocalizations, 100% of total

Total, all levels 3 and 4 combined: 0 vocalizations

In analyzing the Think-Aloud protocol data, I followed the process VanSledright (2002) used. The results from my study indicated that there was also an increase toward the higher levels of this continuum during the second administration of the assessment tool at the end of the study. In the first administration, the four primary informants delivered a total of 75 vocalizations in response to reading the two written texts provided. Of these 75 vocalizations, all were at levels 1 and 2. The second administration of the Think-Aloud Protocol yielded a total of 55 vocalizations from the same four students. Of these 55, 50 were at levels 1 and 2, comprising 91% of the total. There were 5 vocalizations at the level 3, comprising 9% of the total.

Table 5.3. Think-Aloud Protocol Results April 2003

Think-Aloud Protocol Results April 2003								
Number of Vocalizations								
	Document 1 Analytic Level				Document 2 Analytic Level			
Student	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>
Mark	7	0	0	0	5	0	1	0
Amber	7	0	0	0	6	0	1	0
Kiki	4	3	0	0	2	3	1	0
Antonio	4	3	0	0	3	3	2	0
Totals	22	6	0	0	16	6	5	0

Total, all vocalizations: 55

Total, all levels 1 and 2 combined: 50 vocalizations, 91 % of total

Total, all levels 3 and 4 combined: 5 vocalizations, 9 % of total

While the total vocalizations at the higher levels were small in the second administration, there was an increase. It is my belief that this increase may be considered important when viewed in light of a number of factors as compared to VanSledright's (2002) study. First, the sample size of four students was half the size of VanSledright's total of eight. Perhaps more students in the sample would differentiate the results because there would be a larger number of vocalizations to analyze. Second, there were fewer documents used in this study – a total of four compared to VanSledright's total of seven. Having more documents may have given VanSledright's students the opportunity to see more connections among them, providing greater evidence that might have led students to the higher order interpretations such as corroboration across sources. Providing students with more documents might also lead them to develop the “growing knowledge across multiple sources” (VanSledright, 2002, p. 112) that allows the reader to construct more sophisticated interpretations of the events (Level 4) as they unfold. The students were limited to two sources, which allowed only more limited opportunities for intertextual analyses and critical evaluations (Levels 3 and 4).

Third, VanSledright (2002) incorporated images into both performance evaluations, whereas I limited the students in my study to only textual sources during this evaluation. While this allowed my students to focus entirely on the readings, it did not provide them with the same experiences that they had when I taught them. I regularly integrated both textual and visual sources, yet the students were only exposed to textual information during the Think-Aloud Protocol. This decision about my choices for the Think-Aloud protocol documents is further confounded by the fact that I was able to see that students responded in a more sophisticated manner to visual images as compared to

text through qualitative data collected regarding the in-class experience. One might then conclude that the students would have been able to make a greater number of higher-level connections across sources had I exposed them to visual images in combination with text during the think-aloud protocol.

Finally, VanSledright's (2002) more conclusive results may also have to do with both the length of his study as compared to mine, and his selection of subject matter. VanSledright's study lasted five months, whereas I worked with my students for approximately two and one-half months. This gave VanSledright a greater opportunity to expose his students to the historical-investigations approach to instruction, thus providing them with the types of skills required for intertextual analysis over a longer period of time, as he taught nearly every day for 45-50 minutes.

VanSledright (2002) was also able to teach a period of time in American history that provided him with opportunities to utilize arguably more interesting text. Exploration, colonization, and the American Revolution allowed access to a wider range of documents and images, and gave rise to more compelling historical contradictions and dilemmas than teaching about the forming of the American government. I raised this as an issue in my study description, and it became a challenge throughout as I noted in my journal entries: "Not every part of history has compelling questions that are controversial or interesting enough to keep kids going. It will take clever work by the teacher to structure these 'problems' in a meaningful and engaging way" (Journal, January 6, 2003). I also felt compelled to adhere very closely to the curriculum pacing as outlined by my participating teacher, a subject that VanSledright acknowledged was one that he noted he strayed from to a degree in working with his group of fifth graders. The regular teacher of

the class noted that she believed that he had not covered the content and that the class had fallen behind in the district's social studies sequence (VanSledright, 2002, p. 105).

In retrospect, I probably could have provided the students with both a wider range of written documents, and I should have incorporated either visual images or statistical data during the think-aloud performance tasks, much as I had done throughout the class. However, given these limitations, the data still shows that the students demonstrated growth in their capacity to read historical source texts with growing levels of history-specific competence. Since the students knew so little about reading historical text in a manner identified as representative of historical thinking, these results demonstrate the potential of the instructional approach used in this study. These understandings, in combination with data gleaned from class discussions, student writing, interviews, and the Interest and Motivation Survey leads to further questions that should be explored in future studies of this type.

Historical Understandings of my Students

The larger question about whether students learned history more deeply as a result of the historical investigations approach to instruction is difficult to assess fully. It is my belief that, in this study, my students understood history in ways that students in other history classrooms did not. They saw history as an interpretive process rather than as a set of unquestioned facts that needed to be recalled, and began to question sources in terms of reliability and perspective. Although it was not my purpose to compare my students' understandings about this period of history with others, and I would question the kinds of tools one might use in conducting such an analysis, I do believe that my students learned about the time period we studied in *different* ways than students in other history classes.

On the last day of the class, I asked my students to complete the statement, “History is...” in their journals as a 4-minute free-writing assignment. Having done this same activity on my first day, I thought it would be instructive to see how their ideas about history had changed as a result of my instruction. I was impressed with Brent’s original interpretation on January 9, 2003:

History is a big mystery or detective story that had many interesting cases and it’s our job, as the people of the future to put it together. History is bits and pieces of a puzzle that when it comes together forms a story. This “story” can be passed down from generation to generation and most often is. It can be passed down through tale, writing, or even a song. (Brent)

Although these ideas appear to be rather advanced, compare this to his journal entry on March 25, 2003 describing his understanding of history during my last day in the class.

History is pieces of puzzles put together by a historian. If one piece is missing, the whole “puzzle” could be misinterpreted. Speaking of interpretations, history is also an opinion. In your opinion you could include what actually happened, who was involved, where did it happen, when did it happen, and why it happened the way it did and how. (Brent)

I think it is clear that Brent’s ideas about history changed over the course of the study. His second response to this prompt demonstrates a more sophisticated understanding of

history; as he includes the ideas of evidence, interpretation, bias, source, location, time, and description.

Antonio's responses to the prompt seemed to indicate that he experienced a similar transformation in his thinking about history. Here is his first attempt in January:

History is fun for some, boring for others. For me it's both because I like the activity but hate to read about them. I like the events but not the research. This is what history means to me. (Antonio)

His second response demonstrated that he saw history in a different light after experiencing learning history with me. He certainly understands the idea that the past is not a set of unquestioned facts, and that readers need to look to sources as authors' interpretation.

History is a lot of documents, scenes, and important things that took place back in the early ages....History is many copycats and one truth. For instance, a textbook is all secondary documents. A letter from the 1900's a primary document. The difference is secondary is rewritten and [re]worded, primary is real and uncopied... (Antonio)

Others, such as Margaret, had little to say that was different between the first and second writing activity. Here is the January example:

History is what we did. It is what happened long ago. Three years ago or 3 seconds ago. History is our past, present, and future. It can be cleaned but never taken away completely. It is what we make it...

Her March entry:

History is what happened just now. What happened years ago. History is what I just thought, said, and done. History is what happened in 1780. Everything is history years later, months later, years later,...

This was a casual assignment, with little prompting or discussion on my part. I probably could have provided the students with more time to think and to write about what they had learned. The quality of the responses would likely have been richer and more revealing had I made the assignment more targeted and played up its importance. I also could have made it more structured for my ESOL students, who struggled to come up with anything meaningful to say in the short time allotted.

While these examples do not necessarily demonstrate that students understood the time period under study better or more deeply than those students in other history classrooms, they do show that some students in my classroom began to think about history in different and more sophisticated ways. In short, they began the process of learning to think historically. It is likely that, given an entire year of study using a historical-investigation approach, students would become even better historical thinkers. If students become better historical thinkers, one could claim that they will understand history better, and remember more about what they have learned. The source of this claim turns on understanding that the way experts come to know about the past in the first place is through the process of historical thinking.

Summary and Reflections

In this chapter, I explained how the students developed deep understandings about American history content, and how they applied their knowledge of historical thinking skills to analyze and interpret the past. Additionally, I detailed the key themes that emerged among my students with regard to learning about history through a historical-investigation approach. When taken together, these themes indicate that the students began to see history in a different manner than they had previously known. The culture of learning in this classroom shifted over the course of this study in that students began to see both the benefits of working collaboratively to solve problems (mirrored in past in the history domain), and the differences in learning about history by attempting to interpret the past using the documents and images from the time period of the actual events. The participating teacher, Pamela, also saw the benefits and limitations of using this type of practice, making her question her own beliefs about teaching history. The students demonstrated some growth in terms of their reading of primary source documents. Despite several limitations in the think-aloud performance assessment, there was an overall improvement in the student's abilities to think about historical text in more sophisticated ways. Finally, the students demonstrated that they began to think about history in different ways as a result of the practices used in this study. It can be argued that this could lead to better understandings about history if a historical-investigation approach were used in more concerted ways over a longer period of time.

In the next chapter, I turn to examine the first, second, and fourth research questions as they pertain to my experiences as a teacher using a historical-investigation approach. These understandings are closely linked to student learning, but also reveal the

challenges that teachers face in applying these practices within the context of a briskly paced curriculum. Finally, I will discuss the potential implications of using such a teaching approach for classroom teachers, school based and central office administrators, teacher educators, and policy makers.

CHAPTER 6

TEACHING USING A HISTORICAL INVESTIGATIONS APPROACH: WITH IMPLICATIONS FOR TEACHING, ADMINISTRATION, TEACHER EDUCATION AND POLICY

Introduction

When I first envisioned this study, I wanted to find out what it would be like as a classroom teacher to teach history using an investigative-inquiry approach. This topic is of particular interest to me as a curriculum supervisor whose job it is to manage system wide curricula and to set standards for instructional practices in social studies classrooms. I clearly recognize and understand the challenges of teaching in an environment of accountability that is measured by student achievement on standardized tests based on curriculum and content coverage demands set by national, state, or district standards. Teachers must balance the need to move briskly through the content requirements reflected by these standards, while ensuring student learning through sound instructional practices that serve the needs of their population of students. Unfortunately, teachers often complain to me that, to keep pace with curriculum coverage, they must make instructional sacrifices that are not in the best interests of student learning. They worry that by using instructional approaches such as engaging students in historical investigations, they will fall behind on curriculum coverage and will not adequately prepare their students for national, state, or local assessments.

Can a model of history instruction in which students are expected to investigate the past using the original documents and images of the time period be realized under

such constraints? Although far from conclusive, my work with this 8th grade class showed me that it is certainly possible to cover the same general topics in history using a historical investigations approach toward instruction. The major issues that arose were structuring and pacing student learning around historical investigative questions rather than traditional objectives, planning instruction and monitoring student learning using mainly primary source materials, and developing a sense of community problem solving and inquiry within the classroom. In this chapter, I first re-describe my experiences as a teacher in planning for and implementing instruction using the historical-investigations approach in a way that addresses the first and second research questions. Later, I discuss the implications of using this approach with regard to various stakeholders. To address the fourth research question, I relate the complex interplay of the teacher, the students, parents, administrators, and policy makers that influence and are influenced by the implementation of such an instructional approach.

The Practical Application of an Inquiry Approach to Teaching History

I have expressed concerns about how teachers would perceive such an approach to teaching given the need to complete curricular objectives and the difficulty of trying to balance the need to prepare students for assessments while engaging in inquiry-based instruction. I am also very aware of the fact that this form of teaching requires hard work and careful planning so that it can be carried out successfully. Thus, I saw this as a challenging task. I would not only teach using a historical investigation approach, but I would need to show teachers that it is possible for them to successfully employ this

method. In my journal, I made a number of notes about these concerns prior to beginning the study (See Chapter 3).

Planning for units of instruction based on historical investigation is indeed hard work, and would not necessarily be easily packaged for others to use. In fact, Pamela Burke approached me in the fall of 2004 about using the materials that I had used in 2003 with her students when she was teaching the U.S. Constitution. I began to make copies of the materials for her and then realized that none of this would make sense to her unless we met so that I could explain. At our first meeting, I attempted to explain the various investigations and how I implemented these with the students. We spent over one hour and never really made it through one of the investigative questions. As I would begin to describe what I did, I found myself constantly going back to explain why I did something a certain way, or what challenges I encountered when I used a particular document. We both began to realize how difficult it is to describe such a unit of instruction to someone else, because it was much more than simply a unit of instruction – it was also a way of thinking about teaching and learning. The notion of developing a kit or teaching package that shows teachers how to lead students through the guided inquiry of historical problems seems almost naïve. The classroom environment is much too complex, with multiple factors that might influence instruction.

I want to take a moment to envision how one of these investigations might be packaged and what questions one might ask when developing it based on my work. To begin, I entertain a set of key questions that must be considered. Would the chosen documents, images, and maps match the local curriculum? Would these materials work effectively with another group of students? What set of questions would be best to help

guide their interpretations? Are the interests and motivations of all groups of students the same? How might one anticipate student's reactions and interpretations? Do the students have similar reading skills? Do the students possess the necessary prior knowledge in history content to make sense of the context chosen for the investigation? Have they been taught to think interpretively about history, or will this be a new experience for them? Do they possess the skills and experience to work in a collaborative group environment to solve problems?

Of course, this does not take the teacher into account, and doing so begs another set of questions. Do the teachers have the same degree of content knowledge or knowledge of historiography skills? Would their presentation of these historical problems lead students to similar conclusions? How might their own biases or interpretations influence the way the students respond? Do they believe that the materials chosen are in the best interests of their students? All of these questions would have to be considered, making planning such a set of teaching materials problematic to say the least, and probably best reserved for the classroom teacher. These questions also reveal the complexities inherent in applying such a teaching method in classrooms.

Another issue that arises is concerned with how to structure and pace the investigations. One of my primary goals in conducting this study was to see if I could teach in a manner that I believe helps students to understand history in deeper ways. In doing so, I promised the teacher whose class I would be commandeering that I would stay on the same pace that she had planned for her students. Despite spending time at the beginning of my study working on historiography skills that were largely unrelated to the content that I was to teach, I managed to remain on schedule with Pamela Burke's long-

range plan. Although my teaching strategies were vastly different from Pamela's, I managed to cover the same goals as her during the two and one-half month course of the study.

By structuring the investigations around the existing objectives in the curriculum, I was teaching the same material as other teachers in the district, but in a very different manner. It is likely that my students may have known a little more or a little less about certain aspects of the content based on my teaching methods; however, the same might be said for instruction in any two U.S. history classrooms. In terms of pacing the material, I can say with some confidence that I was able to stay on a schedule to complete the course as the teacher had originally planned.

In an interview after the study, I asked her how well she felt I covered the course content. Did I keep up with her original plan?

You stayed pretty much on schedule. The only thing I did differently with regard to content understanding was the structure of the various branches of government. That's not even necessarily in the curriculum either, but it is something I decided to do for (laughter) personal preference. (Pamela)

That being said, I still believed that there were some "missing pieces" in the unit of study that I taught. By placing the interpretation of history in the hands of the students, albeit with much guidance and input from me, I was relinquishing a degree of control over the specific content the students learned. While some have written about how teacher control of content in the classroom might be construed as an attempt to marginalize student access to knowledge (McNeil, 1986), I must admit I believed I felt at

times that I wanted to have *more* control over the content. My students were constructing meaning from the text and other materials, but what if their interpretations are inaccurate based on the available evidence? Although my students learned the same major themes and concepts as others in the school district, I found myself questioning whether they were learning enough, or learning the “right things.” Hence, my own institutionally embedded biases about what content “is of most worth” caused me to question the very methods I used.

It would have been very easy to move to secondary source interpretations in order to expedite instruction and to make sure that students saw the perspectives of a professional historian or writer. It would have been easier still for me to simply tell the students about what happened at the Constitutional Convention, or why the decision to count enslaved people for the purposes of apportionment was so influential to the perpetuation of sectionalism. By maintaining a rather purist approach – using primary source documents almost exclusively and only limited secondary source text – I certainly made the task more challenging than I would probably do as a classroom teacher not involved in research. Despite these challenges and issues, the approach has bolstered my belief that teachers can teach, and students can learn, when using a historical-investigations instructional approach.

The Benefits and Limitations of Using Primary Sources

MS – Did you find that any of the reading was difficult for you?

Amber – Yes, because some of them were, like...old and the words were hard.

General planning and pacing were not the only issues that emerged in the practical application of this alternative method of teaching history. There was the difficulty in planning for instruction using primary source text. I needed to ensure that students had a degree of prior knowledge by integrating some limited secondary source text with teacher led discussions using maps, charts, and images as a context for the investigations. The sheer abundance of primary source text available for this time period also posed major challenges, as I noted. I needed to become very selective, only using that text that provided the most direct and interesting examples of the key ideas I was attempting to impart. The primary source documents that I used needed to be limited in number, length and complexity, and the use of the text had to be supported by methodical, teacher-led analysis.

When I began this study, I intended to use primary sources exclusively as the textual material for the class. My experiences in using these original documents with students yielded mixed results. While I found that my students were able to interpret these sources and develop some rather sophisticated understandings, I found that I needed to make accommodations in how I used them. I also found the need to use secondary textual sources on occasion, usually as a summary or as a way to have the students check their interpretations with those of historians. Pamela also noted the difficulties that students experienced with the readings. “The thing that I saw was they really needed was more work with reading. They could read something, but they lacked the ability to read it in-depth and draw conclusions from it.”

As demonstrated in my descriptions earlier, I found that I needed to carefully select primary source documents that summarized key points of information rather

succinctly. Long, wordy documents tended to turn the students off, and they often got confused about the author's primary argument. In addition, I found that I needed to limit the number of sources they examined for any particular investigation. Too many sources also tended to confuse and overwhelm my students, as evidenced by my final investigation when we examined the Constitution as a blueprint for the lives of all Americans.

Once I identified key primary source text, I found that my students developed better understandings when I broke these documents into smaller sections of text. This process – commonly called chunking -- is a widely used reading strategy that worked particularly well with the sophisticated and sometime archaic language in the historical text I was using. While this certainly slowed the process of our investigations a bit, I found that it was essential if I was to expect them to make meaning of this text. By breaking the text into smaller pieces, the students were less intimidated by the length of the documents. In addition, they were able to focus their attention on particular parts of the text in a structured manner.

I also found that my students were much more likely to provide detailed analysis if given a visual image that was linked to the investigative question. As documented in my study description by their interpretations of broadsides and paintings, the students became much more attentive and interested when presented with images, or even with images of text. For example, they liked looking at the text in its original form as opposed to the same text transcribed into more contemporary type written style. They spent more time with such documents, and tended to analyze them more thoroughly. I attempted to take advantage of this interest of visual images in a number of ways: using pictures,

artifacts, graphs, or maps as context setting activities, as motivational tools, or as tools for analysis in their document files.

In my post-intervention interview with Mark, I asked him what he remembered most about my class. The following is an illustration of what was meaningful for the students, and provides some insight into how to help students recall what they have learned. The use of visual images and artifacts obviously struck a cord.

Yes, I remember when we looked at that picture of the Boston Massacre. We did that a lot, where you would give use things like that and we had to describe what we see in the picture. And I remember when you first got here and you gave us these little objects from history and we had to figure out what they were. I liked that. And then we looked at the Constitution and the amendments and then we had to look at pictures and stuff and try to say what they each represent. (Mark)

This issue of difficulty with text also emerged in the survey, as students indicated an increased frustration with the difficulty of the reading terms. When asked to respond to the statement “I find the vocabulary terms in history to be difficult,” there was a significant increase in the post survey. Despite these issues, I thought it was important to present them with as much primary source text as they could handle. Pamela noted how challenged they were with the text I had selected for my investigations, and indicated how she might need to alter her instruction as a result of what she observed. “The one thing I learned is that the kids needed more reading, and probably more challenging reading. I would give them more challenging reading with the understanding that they would have to comprehend and then give an opinion.” She also provided reason for

optimism in using primary documents to have students analyze and interpret historical problems. “Because the one thing that I saw is that they can get it. And that’s what I learned too, that they can get it if you give them the right kind of text.” (Pamela)

Developing a Sense of Community

Prior to conducting this study, I spent a good deal of time thinking about how I would encourage a group of another teacher’s students to respond to teaching methods that were undoubtedly new to them, and from a teacher that they did not know. I knew that for the study to be effective, the students would have to work together to solve problems, to trust me as their teacher, and to believe that they could interpret historical events. As I noted in the planning stages of this study, “I believe that this investigative approach to teaching is a good one, but it is not going to be as much ‘detective work’ as it will be cooperative problem solving,” (Journal, 1-6-03).

Although some of the students acknowledged that there were times that they disliked working in groups, most saw the benefits of collaborative problem solving. After some initial grumbling and personality issues, they eventually accepted this cooperative group structure as the way the class would operate. I believe that this method was generally accepted in part because of my attempts to elicit trust among the students. By intentionally and overtly demonstrating that I *liked* them and that I liked teaching the class, the students came to accept me as their teacher and as someone they could trust. I greeted the students at the door each day and tried to say hello when I saw them in the hallway. I talked to them about sports or popular culture between classes. Some students would wait with me in the hallway before class to chat or ask me questions. These are

many of the same things that I might do as a teacher anyway, but I made an extra effort to do them in this case. In short, I came “to belong” in the school and in their classroom.

I also reminded them constantly of the need to work together to solve the problems I posed. I sat in with each group during each class period to prompt them, answer questions, encourage them, and validate their ideas. I made it a point to compliment and support those students who struggled the most with historical interpretation. When the class was struggling, we worked as a whole group to analyze data, develop interpretations, or solve problems. This notion of a community of learners is a powerful one that I earlier linked to the world of professional historians (Seixas, 1993).

Developing this sense of community takes time, effort, and patience. Teachers have to sort out relationships among students, attend to sometimes-tricky group dynamics and provide encouragement for the learners. In addition, the teacher must help the students develop a sense of confidence about their abilities to make historical interpretations. My students demonstrated a lack of confidence in their abilities that both Pamela and I noticed during the study, especially when asked to share with the class or to write about what they learned:

Pamela and I discussed how reluctant the students are to express opinions and take risks. We both noted how the students seem to understand and make insightful comments when we question them in small groups or privately, but they do not put this on paper. They also seem rather reluctant to share with the class. (Journal, 2-7-03).

Both the sense of community and the challenges of developing this sense were evident when the students worked in their small groups to solve the investigative questions. As I noted in several student comments earlier in this dissertation, there were times when they disliked working in collaborative groups. There was bickering among group members (Margaret was often at odds with the others in her group), a lack of effort by some students (see earlier comments about Jake and Lavol), disruptions by others (Antonio and Cody), and students who lacked confidence about their ideas (Amber). Despite these problems, the students often helped and provided direction for each other, and even the most reluctant conceded that the benefits were greater than the challenges posed (see comments by Jerrold, Kiki, and Amber in Chapter 5).

The Implications of Using a Historical Investigations Approach

While other disciplines such as science and mathematics have regularly incorporated the processes of professionals into instructional practices, history has not adopted such an approach to teaching. Teachers who engage students in the processes used by real historians as a regular part of classroom instruction are rare and they face unique challenges to both their own paradigms of pedagogy and to the practices and beliefs of others. Throughout what follows, I attempt to address the final research question, as I explore the complexities of using a historical-investigation teaching approach.

Implications for Classroom Teachers

This type of study (practitioner-research) can inform classroom teachers about the efficacy of a historical-investigation approach from the perspective of one who has used

such an approach as a regular form of instruction. This is important because there is a dearth of such practitioner research in the existing literature (VanSledright, 2003; Wilson, 1990), and it is this kind of research that is best suited to answer the questions that teachers often raise about inquiry-based teaching methods. These questions often center around the need to stay close to the district's curriculum, the student's abilities to read challenging primary source materials, their beliefs about whether students can draw interpretations about complex historical phenomena, and whether their school-based or district administrators, or their parent community will support such methods of teaching.

In this study, one of my primary goals was to remain on pace with the local curriculum by linking the historical investigations directly to the stated curriculum objectives of the school district. By generating investigative questions based on these objectives, I was able to closely follow this curriculum and remain on pace with the participating teacher's other classes. My class studied the same content as the other students in the school, albeit in very different ways. I was able to accomplish this by developing historical investigations that were carefully monitored in terms of content and materials, yet that retained an interpretative flavor by asking the students to draw conclusions based on evidence supplied to them. Although some might argue – probably correctly – that these investigations were “canned,” the students were still exposed to the important cognitive processes by which historians study the past. The methods employed in this study are thus a compromise: balancing the need to follow district and state curriculum mandates, while exposing students to the investigative methods used by historical thinkers.

Ten years ago, such a proposal to teach students about American history by using the real documents and images from the time period would have certainly posed significant challenges to classroom teachers. With the advent of web-based, digital archives of historical information that were previously available primarily to those who could take the time to manually sift through such material in libraries, archives, or historical societies, teachers can now conduct such searches from computers in their schools or at home. The archives of the Library of Congress and the National Archives and Records Administration provide easily searchable, online collections that make available a wide array of the original documents of our nation's past. In fact, teachers are more likely to be faced with the challenge of sifting through so much material that it could be overwhelming.

Ancillary materials accompanying textbooks and other commercially available materials also include primary source materials to teachers in both print and electronic forms. These materials are often packaged in kits that are designed to lead students through the investigative processes by providing guide sheets and questions that are written to serve the needs of history teachers seeking to use such methodologies in their classrooms. Therefore, the availability of resources to conduct historical investigations no longer presents significant challenges to those teachers who wish to supplement traditional textbook and other secondary sources in their instruction.

My most significant challenges were in selecting documents that did not intimidate students by either the difficulty of content or length of the text. My students were often challenged by the difficulties of reading textual materials that used sophisticated or archaic language. I found that by controlling the selection of text and by

altering my teaching methods to guide students through the difficult material through chunking and the integration of data and visual images, my students were most successful in developing fuller understandings about historical phenomena. Teachers can learn to be adept at this process as well.

Teachers may also question the abilities of students to perform investigations and to develop understandings about the past based on their own interpretations. Although my students had limited exposure to historical investigative processes prior to this study, I was able to demonstrate that they certainly could begin learning about these processes and successfully make interpretive judgments about history. The culture of learning in this classroom shifted in my short time with them, as they began to see the past through the eyes of the historical actors of the time period rather than through the interpretation of professional historians or textbook writers. These understandings were certainly guided by the instructional methods that I employed. I found that it was often necessary to develop their thinking through targeted questioning and the careful selection of materials. It was also important to provide constant support, recognition, and reinforcement of their efforts, as students were quick to doubt their interpretive judgments.

Implications for Administrators

Teachers also face the challenge of administrators and parents who may question inquiry methods that contest their views of traditional history instruction. In some ways, this may be more daunting than the potential issues previously discussed. Administrators might question methods of teaching history that stray from traditional models because of the need to produce high test scores on state or local assessments. These administrators may believe that an inquiry approach to teaching history will not yield positive results on

such assessments because there is a perception that it would produce less content coverage than more traditional methods. At the district level, curriculum supervisors may also question these methods for many of the same reasons. However, my study suggests that this does not necessarily have to be the case.

The historical-investigation approach also breaks away from the paradigm of teaching history to which both administrators and parents have become accustomed based on their prior experiences. The view of the general public about history education was described in Chapter 2. While this perception is largely negative, it is still the way that history instruction is understood – teacher-centered, pedantic, fact-based, and dull. This might be especially true for parents, who might question teachers and administrators about employing a different approach.

Teachers using a historical-investigation approach raise the risk of coming under such scrutiny, and will need to be prepared to defend their methods. By conforming to the existing curriculum and by maintaining pacing that is consistent with a school district's guidelines, teachers can show that both content coverage and pacing worries are ill founded. Positive reactions and heightened classroom engagement on the part of students should also help to allay concerns raised by administrators. Ultimately though, teachers would need to ensure that their students understand key concepts and ideas about history and be able to communicate that to parents and administrators.

On the other side of the coin, school-based and central office administrators would need to support these teachers by providing access to materials of instruction, professional development opportunities in historical-investigation methods, and encouragement to use these methods. Administrators should acquire the financial support

needed to provide teachers with both textual materials such as kits with primary source documents and artifacts, and with access to computers with a high speed Internet connection that allows for fast downloads of historical documents and images.

Teachers also would need to be presented with rich professional development opportunities. In addition to outside educational experts and historians, teachers should also be given the chance to interact with teachers who are using similar methods. While there has been some success with such methods as teacher-inquiry groups in the field of history education (see Kobrin, 1996), school structures often interfere with the implementation of such a professional development model (Valli & Stout, 2003). Therefore, administrators should demonstrate support for such methods by providing opportunities for teacher-led inquiry among colleagues. This might be accomplished through both regular meetings of teachers or through electronic discussion forums. Finally, administrators would need to defend the efficacy of using historical-investigations methods by providing both material and moral support.

Professional development could be designed so that teachers have multiple opportunities to learn about new methods of teaching and learning, and so that they can see the connections to current research. In addition to the traditional menu of workshops and conferences, districts could provide opportunities for teachers to take courses in both history content and pedagogy. Too often, district staff development is generic, ineffective, and not linked to the content background of the teachers for whom it is designed (Valli & Stout, 2003). These options, combined with support for an inquiry group model like that described by Kobrin (1996) would give teachers greater selection and offer richer learning prospects.

Implications for Teacher Educators

Teacher educators have the unique opportunity to expose prospective social studies teachers to instructional methods that place learning into the hands of students. By teaching their students about inquiry-based methods such as historical-investigations, these programs might help to change the paradigm of history education that turns off many learners. Such methods should be infused into the regular curricula of teacher education programs.

These teacher education programs could provide students with a rich background in the literature of social studies teaching traditions, with a special focus on the most recent research in history education. Researchers such as Peter Lee, Linda Levstik, Peter Seixas, Bruce VanSledright, and Sam Wineburg should become required reading in social studies education programs. In addition, prospective teachers could be exposed to the writing of such thinkers as Michale Kammen and David Lowenthal, who articulately lay the groundwork for understanding how the nature of history education should be reconsidered if, indeed, it is to be genuinely about history rather than heritage or collective memory alone.

These programs should also encourage inquiry on the part of the students as they participate in their field experiences. While some schools encourage a component of practitioner research, this should become a necessary part of the final student internship experience. This research should be directly associated with their field experiences, and might be targeted toward student-centered learning experiences linked to inquiry-based teaching methods that replicate the work of real social scientists and historians. By associating this practitioner research to the content-based teaching strategies rather than

generic ones, these prospective teachers can begin to see the complex relationships that influence the use of teaching methods that place the interpretation of history and social science in the hands of their students. Requiring students to engage in practitioner research also offers the opportunity to enhance the legitimacy of these methods with them and with their mentor teachers.

Finally, there should be cross-curricular links between the reading and social studies education departments in schools of teacher education. As has been demonstrated in this study, the use of strategic reading techniques can be a necessary component of instruction when using a historical–investigation approach. Social studies and reading teaching methods could be fused when students are expected to read difficult expository text such as primary source documents from history. In addition to developing a consistent message about reading strategies within departments, professors in the reading and social studies education fields could be engaging in collaborative research studies that examine the relationships between reading and history. While there have been some such collaborative efforts (Levstik & Barton, 1996; VanSledright & Afflerbach, 2000), there appears to be a need for further studies that will help to unlock the mysteries of reading difficult historical text for students. Putting into place many of these changes could go some distance in ameliorating many of the difficulties and dilemmas an investigative approach creates for teachers.

Implications for Policy Makers

Policy makers at the national, state, and local level also play a role in the future of history education in our schools. At the federal level, the 2001 reauthorization of the Elementary and Secondary Educational Act, commonly called No Child Left Behind

(NCLB), is most notable for its exclusion of history or social studies as a part of any future assessments linked to school improvement (USDE, 2004a). While some may question whether the lack of a national assessment mandate for a history test is an advantage or disadvantage for history teachers, all should be concerned about the message sent to our schools. History education has provoked controversy and elicited battles between conservatives who wish for a more traditional “heritage centered” curriculum, and progressives who desire for a curriculum that is more focused on problem solving and interpretation. Although these disagreements may well be a reason behind history’s exclusion from the testing component of NCLB, there is little doubt that all who view history as an important part of every child’s educational experience might argue that history deserves a place at the table of our federal mandates for public education. Recent statements by groups with disparate views and beliefs about the nature of history and social studies education all point to the potential consequences of its exclusion from NCLB (Finn, in Lemming, Ellington, & Porter-Magee, 2003; NCSS, 2003).

If history education using an investigative approach is to survive, existing federal assessments of history such as NAEP, as well as those developed by state and local educational agencies, need to strive to include more questions that challenge students to think critically and to analyze and interpret historical information. As assessments often help to guide instructional practices, questions that promote historical thinking will provide teachers and school districts with instructional targets and incentives that can influence the ways that history is taught. This can have wide ranging effects, as districts will seek to provide professional development opportunities linked to historical thinking,

publishers will provide materials that will help teachers develop historical inquiry lessons, and curricula will be redesigned to align with the kinds of expectations provided by these assessments. This occurs to some degree through the kinds of questions in high school Advanced Placement courses developed by the College Board called “document-based questions,” which emphasize the application of historical thinking skills in student responses to certain questions, (Venkateswaran, & Morgan, 2002). By providing all students with such assessment expectations, the level of instruction should rise to include the skills of historians and social scientists as a regular component of instruction.

Policy-makers could provide grant funding for both professional development and for research. Since 2002, the United States Department of Education has offered grants to local school districts under the title “Teaching Traditional American History.” These grants, which can provide districts with up to one million dollars, encourage schools to work collaboratively with nonprofit professional organizations, museums, institutions of higher learning, and educational vendors. These grants have certainly offered school districts the opportunity to provide higher quality professional development, but their long-term influence have yet to be determined. The requirements for tendering grant awards also tend to limit districts to professional development centered primarily on history content rather than pedagogy (USDE, 2004b). This provision may limit the kinds of learning opportunities that districts would like to provide to teachers by overlooking research on the teaching of history and focusing mostly on the learning of historical content.

Finally, policy makers should provide funding sources for historical research. In addition to empirical studies using quantitative data, other studies such as the practitioner

research model described in this dissertation should be encouraged. These studies are ecologically grounded in that they take place in classrooms. The many variables surrounding the use of historical-investigation methods noted throughout this section are best analyzed through real classroom experiences and can be accomplished by teachers. Thus, practitioner research has the potential to provide a large body of research about methods of teaching history, enriching the literature base with the descriptive ethnographic studies of history teachers and their students, problems and promises intact.

Summary

Throughout this section, I have described both the manner in which I adapted my teaching as a result of using a historical-investigation method, and the multiple and complex factors that influence the use of inquiry-based teaching methods in history classrooms. When examining the issues of pacing and planning from the perspective of the classroom teacher with eighth graders, developing kits may be too complex for the many teaching and learning variables that are inherent in classrooms. Teachers will have to structure these investigations in a manner that allows them to keep pace with the regular curriculum while engaging students in the processes of historical investigation. Materials will have to be carefully chosen for significance to the curriculum, age-appropriate reading levels, and interest, but this responsibility should fall primarily on the classroom teacher, who is best equipped to address the needs of their students.

Teachers will have to take into account both the benefits and limitations of using primary sources. Based on my experiences with this eighth grade classroom, such factors as the level of prior knowledge of the students, the availability of primary source text, the

difficulty of the text, and the kinds of accommodations that students may need must be considered. Teachers should be prepared to use short, succinct text combined with visual images so that students can make meaning of the materials and connect these with prior learning experiences.

Teachers also need to develop a sense of community in their classrooms. The historical-investigation method is likely to be shift in the culture of learning of the students, as they are exposed to a new paradigm of history instruction. Based on my experiences, teachers would need to form positive relationships with their students and intentionally demonstrate that they care about them. Class discussions would take place in a risk-free setting where students are praised for their abilities to develop historical interpretations. The students in my class often lacked confidence in their abilities to make judgments and to make sense of the multiple resources provided for each of historical investigation.

The use of a historical-investigation method of teaching history has implications for teachers, administrators, teacher educators, and policy makers. Teachers must take into account the many issues associated with the use of these methods in their classroom instruction. Administrators must be prepared to defend the use of these methods by their teachers and to provide ongoing professional development through the use of outside experts, curriculum specialists, and learning communities of teacher using like methods. Teacher educators might benefit teachers and teaching by incorporating the use of such inquiry methods as a regular part of social studies methods classes, and should expose students to recent research about the teaching of history. Policy makers must ensure that social studies topics such as history are included in testing programs, and that the

questions challenge students to use historical thinking skills. They should also provide adequate funding for high quality professional development in both history content and pedagogy, and for research studies regarding the use of historical-investigation methods.

Future Studies

Although I have demonstrated in this study that the students can learn history through a historical-investigation approach, ultimately, in the current educational climate, the test scores of students whose teachers use this approach may still dictate the perpetuation of such methods. It is not clear from this study that such an approach will lead to improvements in student achievement on a particular assessment. Based on past tests of student achievement in history; however, a different approach to teaching might lead to better results. Therefore, further studies of this type might be done which measure student achievement on standardized tests in history by teachers using a historical-investigation approach to instruction.

These studies should attempt to investigate both student learning and methods of teaching. While there is still much to learn about how students understand history and whether the use of approaches which place the interpretation of the past in the hands of students in much the way that professional historians do lead to deeper understandings about history, there is also much to learn about how best to *teach them how to do this*. Future studies should therefore, not only focus on student learning, but on the ways that teachers lead their students through the interpretive process. Practitioner research studies such as the one described in this dissertation is certainly one way to learn about student learning and achievement, as well as how to teach using an inquiry approach. Other studies

might employ researchers to study both student learning and the work of teachers using such methods.

Conclusion

My work with period A-2 at Holly Crest Middle School has led me to conclude that the conceptualization of history teaching that I undertook is possible within the constraints of curriculum and assessment standards, and also leads to a different kind of learning for students. One might argue that the use of a historical-investigation approach to instruction is a labor-intensive exercise for teachers, but the availability of primary source materials in new teaching kits and through online electronic databases address some of these concerns.

There will be significant challenges that teachers would need to address. First, they must identify the reading abilities of their students and learn strategies that will help them negotiate and make meaning of the often-difficult text of history. They must also understand that using a historical-investigations approach will be a shift in the culture of learning for their students. This will lead to a more collaborative and interpretive classroom, but both the students and the teachers will need to adapt to this paradigm shift from the more passive delivery of instruction that has been documented in history classrooms. The complex landscape of education also presents potential problems to the use of teaching methods that challenge existing models. Teachers would need to be supported by administrators and additional research could be funded so that the efficacy of such methods can be explored further.

In sum, the type of instruction that I employed in this study represents something very different for most teachers, their students, and educational stakeholders. The key questions of curriculum coverage, pacing, and assessments need to be explored further. However, I believe that the results of this dissertation, when combined with similar research on teaching history (VanSledright, 2002; Wilson, 1990), offers promise that these questions can be resolved. More importantly, an inquiry approach to instruction such as the historical-investigation methods used with period A-2 provides learning opportunities for children that allows them to apply the skills of analysis, critical thinking, and interpretation in a collaborative classroom environment. Difficult and provocative primary documents, images, maps, and artifacts challenge students in history classrooms using such an approach. They then sort through these materials in much the way that detectives might. These skills, which mimic those of professional historians, permit students to learn about history in a different manner than the traditional history classroom. All of this, I must believe, is a more compelling and powerful way for students to learn. It is also more motivating and engaging.

To summarize these thoughts, I turn to Levstik and Barton (2001, p. 3), who describe the importance of an approach to history that moves beyond inconsequential facts, names and events that characterize the traditional paradigm of history instruction in classrooms throughout this nation.

If history helps us think about who we are and to picture possible futures, we cannot afford a history curriculum mired in trivia and limited to a chronological recounting of events. Instead, we need a vibrant history curriculum that engages

children in investigating significant themes and questions, with people, their values, and the choices they make as the central focus.

Appendices

Appendix A: Applicable Essential Curriculum Objectives for Middle School Social Studies, Howard County Public School System

Eighth Grade Essential Curriculum -- U.S. History To 1877

The Road To Independence | The American Revolution | The New Governments | The
Federalist Era The Jeffersonian Era | The War of 1812, Nationalism, Industrialism | The
Jacksonian Era Westward Expansion | The Gathering Storm | The Civil War |
Reconstruction

UNIT I: The Road To Independence

Goal 1. Students will demonstrate the ability to understand the historical background as
well as the political and social changes that led to the American Revolution. 850.00
Objectives—The student will demonstrate the ability to:

- a. Identify the original 13 colonies and describe their regional differences. 850.01
- b. Explain how the geography of these regions led to economic and cultural
differences. 850.02
- c. Cite ways in which events in Europe precipitated the struggle for empire in North
America. 850.03
- d. Describe how the French and Indian War changed the relationship between Great
Britain and the colonies. 850.04
- e. Analyze the British economic and political policies toward the colonies during
this period. 850.05
- f. Describe the different viewpoints toward and responses to British colonial
policies after reading primary source selections (Reading to be
Informed—Developing Interpretation). 850.06
Analyze the various motives of the colonists in their quest for independence. G/T
850.06
- g. Examine the Declaration of Independence as a rationale for revolution and a
statement of American principles of government. 850.07

G/T Inquiry—In what ways were the motives of the colonists in their quest for
independence similar to those of citizens in countries experiencing revolution and/or civil
war in recent times? (See Foreword)

UNIT II: The American Revolution

Goal 1. Students will demonstrate the ability to understand the major events and identify significant people of the American Revolution. 851.00

Objectives—The student will demonstrate the ability to:

- a. Explain the contributions of military and political leaders in the Revolutionary War effort. 851.01
- b. Examine the contributions of Native Americans, African Americans, and women to the war. 851.02
- c. Explain the significance of important battles of the American Revolution. 851.03
- d. Identify the results of the Treaty of Paris. 851.04
Analyze the outcomes of the war in relation to colonial and British preparedness at the onset. G/T 851.04

G/T Inquiry—How is the spirit of the American Revolution alive today in the United States and other parts of the world? (See Foreword)

UNIT III: The New Governments

Goal 1. Students will demonstrate the ability to understand the development of the federal government as a result of the United States Constitution during the Federalist Period. 852.00

Objectives—The student will demonstrate the ability to:

- a. Identify the strengths and weaknesses of the Articles of Confederation. 852.01
Determine the reasons for the initial experimentation with a confederal form of government. G/T 852.01
- b. Identify several key compromises that were necessary in order for the Constitution to receive approval. 852.02
- c. Interpret the authors' intent after reading the Preamble to the Constitution (Reading to be Literary Experience—Developing Interpretation) 852.03
- d. Summarize the content and structure of the Constitution including the Preamble, the Articles, and the Bill of Rights. 852.04
- e. Explain the principles of government incorporated in the Constitution. 852.05
- f. Analyze the Federalist and Anti-Federalist arguments for and against the ratification of the Constitution. 852.06
- g. Contrast the basic differences between strict and loose interpretation of the Constitution. 852.07
Analyze the motivating factors of Hamilton and Jefferson based on the outcomes of a government run on a loose or strict interpretation of the Constitution. G/T 852.07
- h. Investigate and analyze contemporary issues which demonstrate the evolutionary nature of the Constitution. 852.08

G/T Inquiry -How have the rights of American citizens evolved over time? Investigate the evolution of rights as reflected in judicial and legislative actions over the last 200 years. The focus of this investigation is on segments of society whose rights were not originally addressed in the Constitution and Bill of Rights. (See Foreword)

Appendix B: Data Collection Table

Tool	Type	Purpose
Motivation/Interest Survey	Quantitative Pre and Post	Determine if levels of interest and motivation, and their understandings about history changes over the time span of the unit of instruction
Think-Aloud Protocol/Audio-taped	Qualitative and Quantitative Pre and Post	Determine if levels of sophistication in the reading of historical text changes over the time of the unit of instruction
Student Work	Qualitative and Quantitative	Provide data for analysis of student understanding of historical concepts and ideas over the time span of the unit of instruction
Student Interviews/Audio-taped	Qualitative	Determine if levels of interest and motivation and understandings about the nature of history changes over the time span of the unit of instruction
Videotapes	Qualitative	Provide video data for analysis and for corroboration with other forms of data
Audiotapes	Qualitative	Provide audio data for analysis, transcription, and for corroboration with other forms of data
Lesson Plans	Qualitative	Provide written data for analysis and for corroboration with other forms of data
Field Notes of Privileged Observer	Qualitative	Provide written data for analysis and for corroboration with other forms of data
Personal Journal	Qualitative	Document the experiences of the researcher as the study proceeds from beginning to end

Appendix C: Motivation/Interest Survey Items

Directions:

“History is an important part of your social studies classes.”

“I am interested in your understanding of history and how much you like history.”

“The statements tell me how some students feel about history.”

“Read each statement and decide whether it talks about a person who is like your or different from you.”

“There are no right or wrong answers. I only want to know how you feel about history”

“If the statement is **very different from you**, circle a 1.”

“If the statement is a **little different from you**, circle a 2.”

“If the statement is a **little like you**, circle a 3.”

“If the statement is a **lot like you**, circle a 4.”

CIRCLE ONE ANSWER FOR EACH QUESTION, USING THESE ANSWERS:

1. Very different from me
2. A little different from me
3. A little like me
4. A lot like me

- | | | | | |
|--|---|---|---|---|
| 1. I like learning about history. | 1 | 2 | 3 | 4 |
| 2. Social studies is my favorite subject in school. | 1 | 2 | 3 | 4 |
| 3. History is my favorite part of social studies. | 1 | 2 | 3 | 4 |
| 4. I like reading books about history. | 1 | 2 | 3 | 4 |
| 5. I am pretty good at reading history books. | 1 | 2 | 3 | 4 |
| 6. I think history is like a detective story. | 1 | 2 | 3 | 4 |
| 7. I my teacher mentions something interesting about history in class, it makes me want to read more about it. | 1 | 2 | 3 | 4 |
| 8. I read to learn new information about topics in history that interest me | 1 | 2 | 3 | 4 |
| 9. I like hearing the teacher say that I am good at history. | 1 | 2 | 3 | 4 |
| 10. It is sometimes difficult to read my history book. | 1 | 2 | 3 | 4 |
| 11. It is hard to know what really happened in history. | 1 | 2 | 3 | 4 |

12. I like to tell my family about what I am learning in history.	1	2	3	4
13. I think history is mostly facts.	1	2	3	4
14. I think there is usually a simple answer to questions about history.	1	2	3	4
15. I like it when there is more than one opinion about people or events in the past.	1	2	3	4
16. I read my history book because I have to.	1	2	3	4
17. My parents tell me I am good at history.	1	2	3	4
18. I think history is boring.	1	2	3	4
19. I think history is like a story.	1	2	3	4
20. I find the vocabulary terms in history to be difficult.	1	2	3	4
21. In comparison to my other subjects, I am best at history.	1	2	3	4
22. I like to go to museums and historic sites.	1	2	3	4

*Questions above derived from the following:

Wigfield, A., Guthrie, J. T., Mc Gough, K. (1996). A questionnaire measure of children's motivations for reading. University of Maryland: NRRC.

Results of the Motivation/Interest Survey

Question	Pre-Intervention		Post-Intervention		Range
	N=16		N=16		N=16
	Total	Avg.	Total	Avg.	
1. I like learning about history.	41	2.56	41	2.56	0
2. Social studies is my favorite subject in school.	32	2	35	2.19	+ .19
3. History is my favorite part of social studies.	37	2.31	46	2.88	+ .57
4. I like reading books about history.	35	2.19	29	1.81	- .38
5. I am pretty good at reading history books.	40	2.5	38	2.38	- .12
6. I think history is like a detective story.	37	2.31	46	2.88	+ .57
7. I like when my teacher mentions something interesting about history in class, it makes me want to read more about it.	41	2.56	43	2.69	+ .13
8. I read to learn new information about topics in history that interest me.	39	2.43	35	2.19	- .24
9. I like hearing the teacher say that I am good at history.	31	1.94	49	3.06	+ 1.12
10. It is sometimes difficult to read my history book.	40	2.5	41	2.56	+ .06
11. It is hard to know what really happened in history.	43	2.69	45	2.81	+ .12
12. I like to tell my family about what I am learning in history.	39	2.43	41	2.56	+ .13
13. I think history is mostly facts	50	3.13	46	2.88	- .25
14. I think there is usually a simple answer to questions about history.	35	2.19	42	2.63	+ .44
15. I like it when there is more than one opinion about people or events in the past.	45	2.81	48	3.0	+ .19
16. I read my history book because I have to.	45	2.81	48	3.0	+ .19
17. My parents tell me I am good at history.	39	2.43	38	2.38	- .05
18. I think history is boring.	44	2.75	50	3.13	+ .38
19. I think history is like a story.	51	3.19	50	3.13	- .06
20. I find the vocabulary terms in history to be difficult.	33	2.1	54	3.38	+ 1.28
21. In comparison to my other subjects, I am best at history.	33	2.1	31	1.94	- .16
22. I like to go to museums and historic sites.	36	2.25	36	2.25	0

Appendix D: Pre- and Post-Think-Aloud Protocol Text

Instructions:

“I am going to be asking you to read two historic documents about the same topic. Each of these documents is a primary source, or the original writings of an author based on their observations of real events. You will read these documents aloud.”

“As you are reading the documents, you will notice blue-colored dots on the paper in certain places. When you reach these dots as you read, I would like you to stop and describe what you are thinking about what you were just reading. In other words, you will describe your thoughts as you are reading. This procedure is called a ‘think-aloud’.”

“Before you do the real thing, we are going to do a practice exercise. I will demonstrate first, and then I would like you to try one.” (I will read the following passage and demonstrate the process to the student).

England had found no gold in the new world. Nor had England found a northwest passage to Asia. England did not have Spain’s wealth, but it was rich in another way. It had speedy ships and skilled ocean sailors. At first, the English sailors went after fish in the Grand Banks. Then they went after Spanish treasure ships.

“Now I would like you do practice with the following passage.”

Sir Walter Raleigh from England sent out some ships to explore the Atlantic Coast. They visited Roanoke Island in 1584. Raleigh claimed the land for England, calling it Virginia. The next year, Raleigh sent a group of colonists to settle and build a fort on Roanoke Island. The settlers, however, did not expect to work. They expected the Indians to feed them. Sir Francis Drake stopped by the settlement in 1586 and found the colonists starving. He took them back to England with him.

(Make sure that the student understands the task. If they do, proceed with the two readings on Native American treatment of women. If not, ask the student to repeat the practice task above and coach them about how to respond to the reading as they proceed.)

Document One: Pre-Think Aloud Protocol Text

Jesuit Observations on the “Enslavement” of Native American Women, 1633

•

“...To obtain the necessities of life they [the Indians of Acadia] endure cold and hunger in an extraordinary manner. During eight or ten days, if the necessity is imposed on them, they will follow the chase in fasting, and they hunt with the greatest ardor when the snow is deepest and the cold most severe.”

•

“And yet these same Savages, the offspring, so to speak, of Boreas [the North Wind] and the ice, when once they have returned with their booty and installed themselves in their tents, become indolent and unwilling to perform any labor whatever, imposing this entirely upon the women.”

•

“The latter, besides the onerous role of raising and rearing the children, also transport the game from the place where it has fallen; they are the hewers of wood and drawers of water; they make and repair the house-hold utensils; they prepare food; they sew garments; they catch fish and gather shellfish for food;

•

...often they even hunt; they make the canoes, that is, skiffs of marvelous rapidity, out of bark; they set up the tents wherever and whenever they stop for the night...”

•

“... – in short the men concern themselves with nothing but the more laborious hunting and the waging of war.

-

For this reason almost every one has several wives, and especially the Sagamores, since they cannot maintain their power and keep up the number of their dependents unless they have not only many children to inspire fear or conciliate favor, but also many slaves to perform patiently the menial tasks of every sort that are necessary. For their wives are regarded and treated as slaves.”

-

Biard, P. (1633). In R. G. Thwaites. (1896-1901). *The Jesuit relations and allied documents*. Vol. 1, pp. 257-259. In J. Axtell, ed. (1981). *The Indian peoples of Eastern America: A documentary history of the sexes*. pp. 106-107. New York: Oxford University Press.

-

Document Two: Pre-Think-Aloud-Protocol Text

A Challenge to European Stereotypes of Native American Gender Relations, 1819

•

“When a marriage takes place, the duties and labours incumbent on each party are well known to both.

•

It is understood that the husband is to build a house for them to dwell in, to find the necessary implements of husbandry, as axes, hoes, etc., to provide a canoe, and also dishes, bowels, and other necessary vessels for housekeeping.

•

The woman generally has a kettle or two, and some other articles of kitchen furniture, which she brings with her.”

•

“The husband, as master of the family, considers himself bound to support it by his bodily exertions, as hunting, trapping, etc.;

•

the woman, as his *help-mate*, takes upon herself the labours of the field, and is far from considering them as more important than those to which her husband is subjected, being well satisfied that with his gun and traps he can maintain a family in any place where game is to be found;”

•

“...nor do they think it [the women] any hardship imposed upon them; for they themselves say, that while their field labour employs them at most six weeks in the year, that of the men continues the whole year round...”

-

The work of the women is not hard or difficult. They are both willing and able to it, and always perform it with cheerfulness. Mothers teach their daughters those duties which common sense would otherwise point out to them when grown up.”

-

“Within doors, their labour is very trifling; there is seldom more than one pot or kettle to attend to. There is no scrubbing of the house, and but little to wash, and that not too often. Their principle occupations are to cut and fetch in the fire wood, till the ground, sow and reap the grain, and pound the corn in mortars for their pottage, and to make bread which they bake in the ashes.”

-

Heckenwelder, Rev. J. (1819). *History, manners, and customs of the Indian nations who once inhabited Pennsylvania and the neighboring states*, Reichel, Rev. W. (Philadelphia: Historical Society of Pennsylvania, 1876), pp. 154-158. In J. Axtell, ed. (1981). *The Indian peoples of Eastern America: A documentary history of the sexes*. pp. 134-137. New York: Oxford University Press.

-

Documents One and Two: Post-Think-Aloud-Protocol Interview Text

Two Accounts of the Battle of Lexington Green

-

On April 19, 1775, a group of British soldiers marched into Lexington on their way to seize some colonial military supplies stored in Concord. They were met on Lexington Green by colonial militia led by Captain John Parker. In the next few moments shooting started and several colonists were killed. The first account is from John Parker, captain of the Colonial Militia. The second is from John Pitcairn, military commander of the British troops.

-

Account of John Parker

“I, John Parker, of lawful age, and commander of the Militia in Lexington, do testify and declare, that on the nineteenth instant (April 19), (about one o’clock) in the morning...,

-

...being informed that there were a number of Regular (British) officers riding up and down the road, stopping and insulting people as they passed...,

-

and also... that a number of regular troops were on the march from Boston in order to take the Province Stores at Concord, ordered our Militia to meet on the (Lexington) Common...to consult what to do.

-

(We) concluded not to be discovered, nor meddle or make with said Regular Troops, if they should, unless they should insult us.

-

Upon their sudden approach, I immediately ordered our Militia to disperse and not to fire. Immediately said troops made their appearance,... rushed furiously, fired upon and killed eight of our party without receiving any provocation therefore from us.”

-

Account of John Pitcairn

“I gave directions to the troops to move forward, but on no account to fire, or even attempt it without orders.

•

When I arrived at the end of the village, I observed drawn up on a green near 200 of the Rebels. When I came within about one hundred yards of them, they began to file off toward some stone walls and our right flank.

•

The Light Infantry, observing this, ran after them. I instantly called to the soldiers not to fire, but to surround and disarm them,

•

and after several repetitions of those positive orders to the men – not to fire etc.-some of the Rebels, who had jumped over the wall, fired four or five shots at the soldiers, which wounded a man of the Tenth;, and my horse was wounded in two places, from some quarter or other.

•

At the same time several shots were fired from a Meeting House on our left. Upon this, without any order or regularity, the Light Infantry began a scattered fire, and continued in that situation for some little time, contrary to the repeated orders both of me and the officers that were present.

•

It will be needless to mention what happened after, as I suppose Col. Smith has given a particular account of it, I am sir

Your most obedient humble Servant,

•

/ s / *John Pitcairn* Boston Camp, 26th april, 1775”

Appendix E: Investigative Work Form

Sourcing the Document

- Author:
- Title:
- Location:
- Date:
- Purpose:

Evaluating the Evidence

- Was this a primary or secondary source? Why?
- Did the author have a reason to lie?
- Did the author explain both sides?
- Did the author add opinion? How do you know?
- Was this a public or private statement?
- **Evaluate the source overall. How reliable is it?
What are its strengths and weaknesses?**

Corroboration

What is the relationship of this source to the investigative question? Is there other evidence to support the evidence in this source? Where?

Appendix F: Materials Used in Investigations Three and Four

Lesson Plan for Investigation #3

Investigative Question 3

What factors made the task to form a different government so difficult?

Setting the Context

- 1) Begin this lesson by conducting a review of the similarities and differences that existed between the various colonies. Place a map on the overhead of the original 13 colonies. Discuss with the students: *How were the Colonies were Similar and Different?*

Examining the Evidence

- 2) Now that we have seen that the Articles of Confederation had serious deficiencies, both the people and politicians realized the need for change. Read quote from George Mason that is posted, “The Eyes of the United States are turned upon this Assembly and their Expectations raised to a very anxious degree. May God Grant that we may be able to gratify them, by establishing a wise and just Government.”
- 3) The states appointed 74 delegates to a new convention in Philadelphia during the summer of 1787. Of those appointed, 55 attended the convention. There were some serious problems that the members who were to attend this Constitutional Convention needed to resolve. The purpose of this investigation is for you to uncover these issues based on the evidence in your document files.
- 4) Here are some very important ideas for you to consider as you review these files: the issue of slavery, the differences between the economies of each state, the type of men who attended the convention, the statements of the delegates and which state they were from, and the importance of “counting people.”
- 5) Highlight some key terms that they may need to define using the dictionaries at their tables: *despotism, magistrate, negligence, abolition, proportional*

Constructing Interpretations and Formulating Theories

- 6) Work through one set of documents together as a group. Have students first locate the document called “Founding Fathers: Delegates to the Constitutional Convention.” Read aloud the introductory materials. Why do you think it is so important to see the delegates and which state they represented? Explain that this is an important reference. They will be reading lots of quotes from the delegates and it is important to know which state they represent.

- 7) Do an example with them. Have students refer to chart entitled “Population by State.”
 - Which region (NE. Middle. South) had the largest population?
 - Which 4 states had the largest population?
 - Which 4 states had the smallest population?
 - Now look at the pink sheet with three quotes. First, what is the source? Who do you think this person was (refer back to list of delegates)?
 - Read aloud the first quote. What is this person saying? What state is he from?
 - Read the last quote aloud. What is this person saying? What state is he from?
 - Now, think back to the issue of “Counting People.” What is a republic (people elect reps)? What is the relationship between the quotes from these two men and the states that they represent? What do you think Gunning Bedford fears?
 - Now read the quote from Benjamin Franklin? Based on this statement, what role do you suppose that he played at the convention? Recalling the term proportional, what is he saying here?
- 8) Let’s now turn to the chart. What is the factor here? (How states will be represented). What is the explanation (Population of the states was unequal. Big states want representation by population; smaller states want representation by states)? What is the evidence?
- 9) Now let me review the other documents in your Document Files. Recall the issues.
- 10) The groups should be able to develop a list of the factors that made the formation of a new government so difficult. Each item on the list should be supported by the documents that helped them reach these conclusions, and these should be recorded on the graphic organizer.
- 11) Review by having each group share how they have categorized the evidence.

Develop a Critical Interpretation

- 12) Have each group share one example from their graphic organizer with the class. Encourage students to ask probing questions of the various group members, being sure to supply validation and evidence to support their claims.
- 13) Explain that now that the Continental Congress is faced with these dilemmas, they had to come up with solutions. Each group must now predict how the Congress resolved one of the issues. They are to develop a resolution that describes how the new constitution might go about solving the problem. The resolution should fit one side of one page.
- 14) Collect each group’s resolution and score for a group grade.
- 15) In their journals, students should respond to the investigative question. Inform students that these journal entries will be scored for individual grades and collected during the next class period.

Introductory Questions and Notes

What factors made the task to form a new government so difficult?

“The eyes of the United States are turned upon this assembly and their expectations raised to a very anxious degree. May God grant that we may be able to gratify them, by establishing a wise and just government.” -- Delegate George Mason, 1787.

The Second Constitutional Convention – Summer of 1787

- Problems of Articles of Confederation needed to be fixed
- 74 delegates from the states, 55 attended
- Philadelphia, PA
- Many other problems as well

Issues to Focus upon in Investigation

- Issue of Slavery
- Geography/Population of the States
- Type of Men at Convention
- Statements of the Delegates/Where they were from
- Importance of “Counting” People

Key Terms – What do they mean?

- Despotism
- Magistrate
- Negligence
- Abolition
- Proportional

Call to Convention

AN ACT

FOR APPOINTING DEPUTIES FROM THIS COMMONWEALTH TO A CONVENTION
PROPOSED TO BE HELD IN THE CITY OF PHILADELPHIA IN MAY NEXT, FOR
THE PURPOSE OF REVISING THE FEDERAL CONSTITUTION.

WHEREAS the Commissioners who assembled at Annapolis, on the fourteenth of September last, for the purpose of devising and reporting the means of enabling Congress to more fully supply the civil Government of the United States, have performed the necessity of extending the ~~term~~ of the Federal Government in all its details; and have recommended, that Deputies be appointed by the several Legislatures, to meet in convention in the city of Philadelphia, on the second day of May next; a provision which seems to promise a discussion of the subject in Congress, where it might be too much interrupted by the ordinary business before them; and where it would better, be directed of the valuable counsels of freely independent, who are distinguished by the confidence or love of patriotic States, or relieved by peculiar circumstances from a fear of that Assembly;

AND WHEREAS, the General Assembly of this Commonwealth, taking into view the effect of the Convention, as well as the strong representations made from time to time, by the United States in Congress, particularly in their act of the thirteenth day of February last, can no longer doubt that the crisis is arrived at which the great people of America are to decide the solemn question, whether they will by wise and ungenerous efforts reap the full fruits of a system of peace which they have so gloriously acquired, and of that Union which may have entered with so much of their blood; or whether, by giving way to unmanly jealousies and prejudices, or to partial and treacherous counsels, they will smother the auspicious blessings proposed for them by the Revolution, and furnish to its enemies an eternal triumph; whereby, by whole virtue and valor, it has been accomplished;

AND WHEREAS, the same noble and extended Policy, and the true federal and affluence sentiments, which originally determined the Citizens of this Commonwealth, to unite with their Brethren of the other States, in establishing a national Government, cannot but be felt with equal force now as the means to lay aside every inferior consideration, and to exert in each further exertions and provisions, as may be necessary to secure the great objects for which that Government was instituted, and to render the United States as happy in Peace, as they have been glorious in war.

It is therefore enacted, by the General Assembly of the Commonwealth of Virginia, That seven Commissioners be appointed by joint ballot of both Houses of Assembly, who, or any three of them, are hereby authorized as Deputies from this Commonwealth to meet such Deputies as may be appointed and authorized by other States, to assemble in Convention at Philadelphia, as above recommended, and to join with them in devising and discussing all such alterations and further provisions, as may be necessary to render the Federal Constitution, adequate to the exigencies of the Union, and in reporting forth an act for that purpose, to the United States in Congress, as when agreed to by them, and duly confirmed by the several States, will and lawfully provide for the same.

And be it further enacted, That in case of the death of any of the said Deputies, or of their declining their appointments, the Executive are hereby authorized to supply such vacancies; and the Governor is requested to transmit forthwith a copy of this Act, to the United States in Congress, and to the Executions of each of the States in the Union.

November 9, 1786, read the third time and passed the House of Delegates.

JOHN BECKLEY, C. M. D.

November 23, 1786, passed the Senate.

H. BROOKE, C. S.

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AN ACT

FOR APPOINTING DEPUTIES FROM THIS COMMONWEALTH TO A CONVENTION

PROPOSED TO BE HELD IN THE CITY OF PHILADELPHIA IN MAY NEXT, FOR THE PURPOSE OF REVISING THE FOEDERAL CONSTITUTION.

WHEREAS the Commissioners who assembled at Annapolis, on the fourteenth of September last, for the purpose of devising and reporting the means of enabling Congress to provide effectually for the Commercial Interest of the United States, have represented the necessity of extending the *{Begin deleted text} [??] {End deleted text}* of the foederal system to all its defects; and have recommended, that Deputies for that purpose be appointed by the several Legislatures to meet in convention in the city of Philadelphia, on the second day of May next; a provision which seems preferable to a discussion of the subject in Congress, where it might be too much interrupted by the ordinary business before them; and where it would besides, be deprived of the valuable councils of sundry individual, who are disqualified by the constitution or laws of particular states, or restrained by peculiar circumstances from a seat in that Assembly:

AND WHEREAS, the General Assembly of this Commonwealth, taking into view the actual situation of the Confederacy, as well as reflecting on the alarming representations made from time to time, by the United States in Congress, particularly in their act of the fifteenth day of February last, can no longer doubt that the crisis is arrived at which the good people of America are to decide the solemn question, whether they will by wise and magnanimous efforts reap the just fruits of that independance which they have so gloriously acquired, and of that Union which they have cemented with so much of their common blood; or whether, by giving way to unmanly jealousies and prejudices, or to partial and transitory interest, they will renounce the auspicious blessings proposed for them by the Revolution, and furnish to its enemies an eventual triumph over those, by whole virtue and valour, it has been accomplished:

AND WHEREAS, the same noble and extended Policy, and the same fraternal and affectionate sentiments, which originally determined the Citizens of this Commonwealth, to unite with their Brethren of the other States, in establishing a foederal Government, cannot but be felt with equal

force now as the motives to lay aside every inferior consideration, and to concur in such farther concessions and provisions, as may be necessary to secure the great objects for which that Government was instituted, and to render the United States as happy in Peace, as they have been glorious in war.

Be it therefore enacted, by the General Assembly of the Commonwealth of Virginia, That seven Commissioners be appointed by joint ballot of both Houses of Assembly, who, or any three of them, are hereby authorized as Deputies from this Commonwealth to meet such Deputies as may be appointed and authorized by other states, to assemble in Convention at Philadelphia, as above recommended, and to join with them in devising and discussing all such alterations and farther provisions, as may be necessary to render the foederal Constitution, adequate to the exigencies of the Union, and in reporting such an act for that purpose, to the United States in Congress, as when agreed to by them, and duly confirmed by the several states, will effectually provide for the same.

And be it further enacted, That in case of the death of any of the said Deputies, or of their declining their appointments, the Executive are hereby authorized to supply such vacancies; and the Governor is requested to transmit forthwith a copy of this Act, to the United States in Congress, and to the Executives of each of the states in the Union.

November 9, 1786, read the third time and passed the House of Delegates.

JOHN BECKLEY, C. H. D.

November 23, 1786, passed the Senate.

H. BROOKE, C. S.

The Founding Fathers
Delegates to the Constitutional Convention

On February 21, 1787, the Continental Congress resolved that:

...it is expedient that on the second Monday in May next a Convention of delegates who shall have been appointed by the several States be held at Philadelphia for the sole and express purpose of revising the Articles of Confederation...

The original states, except Rhode Island, collectively appointed 70 individuals to the Constitutional Convention, but a number did not accept or could not attend. Those who did not attend included Richard Henry Lee, Patrick Henry, Thomas Jefferson, John Adams, Samuel Adams and, John Hancock.

In all, 55 delegates attended the Constitutional Convention sessions, but only 39 actually signed the Constitution. The delegates ranged in age from Jonathan Dayton, aged 26, to Benjamin Franklin, aged 81, who was so infirm that he had to be carried to sessions in a sedan chair.

Our Founding Fathers

(* indicates delegates who did not sign the Constitution)

Connecticut

William. Samuel Johnson
Roger Sherman
Oliver Ellsworth (Elsworth)*

Delaware

George Read
Gunning Bedford, Jr.
John Dickinson
Richard Bassett
Jacob Broom

Georgia

William Few
Abraham Baldwin
William Houston
William L. Pierce*

Maryland

James McHenry
Daniel of St. Thomas Jenifer

Daniel Carroll
Luther Martin*
John F. Mercer*

Massachusetts
Nathaniel Gorham
Rufus King
Elbridge Gerry*
Caleb Strong*

New Hampshire
John Langdon
Nicholas Gilman

New Jersey
William Livingston
David Brearly (Brearley)
William Paterson (Patterson)
Jonathan Dayton
William C. Houston*

New York
Alexander Hamilton
John Lansing, Jr.*
Robert Yates*

North Carolina
William. Blount
Richard. Dobbs Spaight
Hugh Williamson
William R. Davie*
Alexander Martin*

Pennsylvania
Benjamin Franklin
Thomas Mifflin
Robert Morris
George Clymer
Thomas Fitzsimons (FitzSimons; Fitzsimmons)
Jared Ingersoll
James Wilson
Gouverneur Morris

South Carolina
John Rutledge
Charles Cotesworth Pinckney

Charles Pinckney
Pierce Butler

Rhode Island

Rhode Island did not send any delegates to the Constitutional Convention.

Virginia

John Blair
James Madison Jr.
George Washington
George Mason*
James McClurg*
Edmund J. Randolph*
George Wythe*

Source: National Archives Administration -- public web site.¹

¹ This document was given to all groups.

Quotes from Convention Delegates Regarding Issue of Congressional Representation

“If the large states possess the power, the abuse of it could not be checked; and what then would prevent [them] from exercising it to our destruction?”

-- Gunning Bedford Jr., Delaware

“The diversity of opinions turns on two points. If a proportional representation takes place, the small States contend that their liberties will be in danger. If an equality of votes is to be put in its place, the large states say their money will be in danger. When a broad table is to be made, and the edges of planks do not fit, the artist takes a little from both, and makes a good joint. In like manner here both sides must part with some of their demands, in order that they may join in some accommodating proposition.”

-- Benjamin Franklin, Pennsylvania

“Can we forget for whom we are forming a government? Is it for *men*, or for the imaginary beings called *States*?”

-- James Wilson, Pennsylvania

Source: James Madison’s *Notes*, transcribed nightly during the Constitutional Convention.

Series of Overhead Transparencies to Analyze Key Issues Facing Convention Delegates

“The diversity of opinions turns on two points. If a proportional representation takes place, the small States contend that their liberties will be in danger. If an equality of votes is to be put in its place, the large states say their money will be in danger. When a broad table is to be made, and the edges of planks do not fit, the artist takes a little from both, and makes a good joint. In like manner here both sides must part with some of their demands, in order that they may join in some accommodating proposition.”

-- Benjamin Franklin, Pennsylvania

In your Journals:

“Analysis of Ben Franklin Quote”

1. What does the term “proportional representation” mean in this sentence?

-- *Skip 5-6 lines* --

2. What does the term “equality of votes” mean in this sentence?

-- *Skip 5-6 lines* --

3. What is he saying in the last 2 sentences?

Key Ideas:

- A Republic is _____
- Proportional means _____
- The states had different populations
- Each state wanted to have its say in the new government

Issues at the Convention

What factors made the task to form a different government so difficult?

Factor #1 (In your own words based on our discussion)

Evidence:

What is a person?

Who votes?

Where do different people live?

What does the Declaration of Independence say about rights?

Various Artifacts in Document Files for Student Groups Working on Investigative
Questions Three and Four

GROUPS A & C

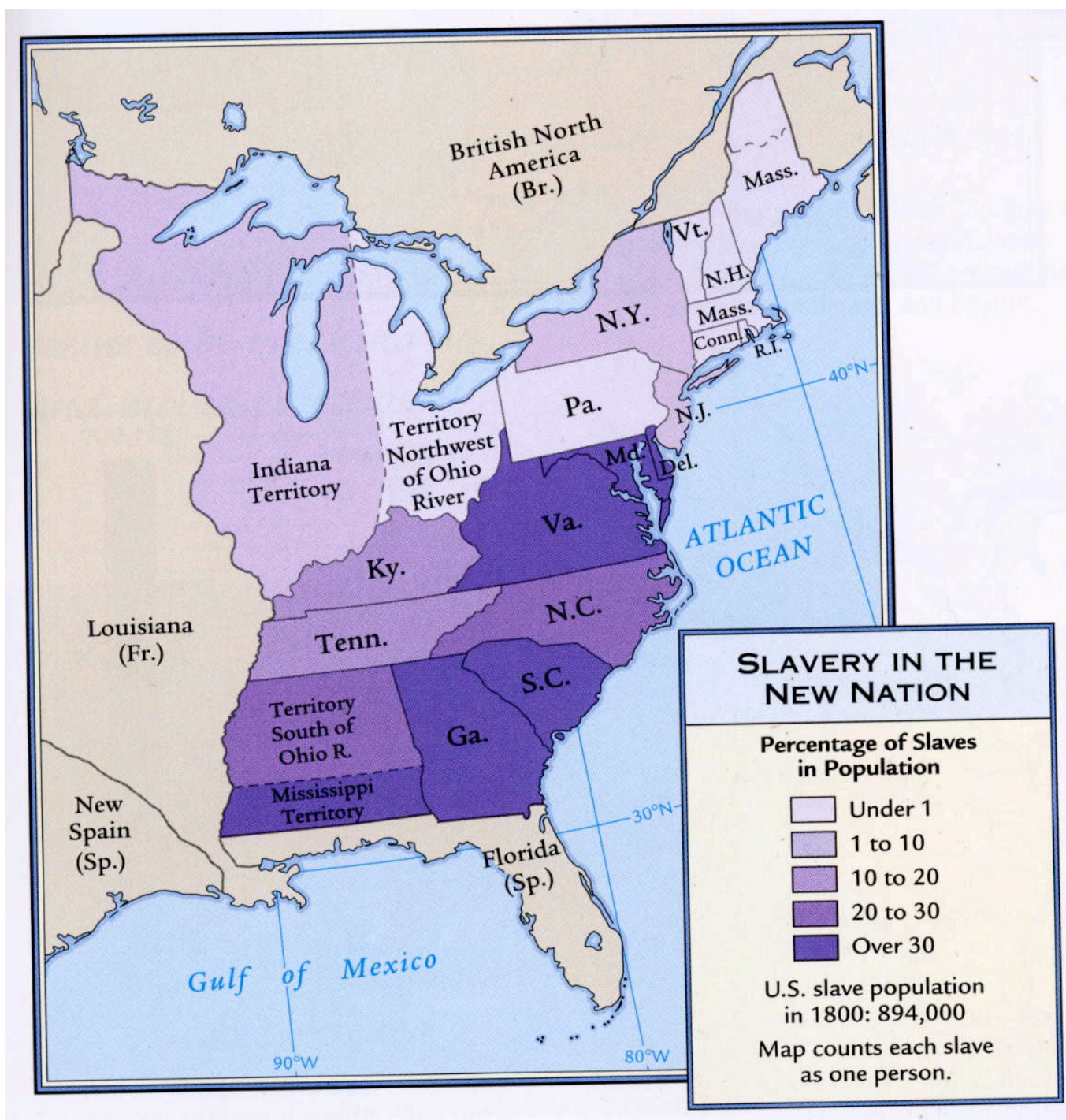
Your topic is:

SLAVERY AND PROPORTIONAL REPRESENTATION

- 1. Based on the evidence in your *Document File*, describe the factor that caused a conflict among the delegates around this issue.**

- 2. Cite specific examples of evidence to support your description.**

- 3. Develop a solution to this issue. Predict how the delegates might have acted by writing a resolution to the Constitutional Convention describing your solution.**



Source: *Nystom Atlas of United States History*

<u>Population by State, 1790</u>												
New England (Including Vermont)				Middle			Southern (Total Including Fla)					
1,009,408				958,632			1,851,806					
Conn.	Mass	NH	RI	New York	New Jersey	Penn	Del	Geo.	MD	N Car.	S Car.	VA
237,946	475,327	141,885	68,825	340,120	184,139	434,373	59,096	249,073	319,728	393,751	249,073	747,610

* This chart developed based on data from:

United States Bureau of the Census. (1961). *Historical Atlas of the United States:*

Colonial Times to 1957. Washington, D.C.: Author²

² This chart was given to all groups.

NOTES AT THE FEDERAL CONVENTION

1787

-- *James Madison*

Wednesday August 22. in Convention

Art. VII sect 4. resumed. Mr. Sherman was for leaving the clause as it stands. He disapproved of the slave trade: yet as the States were now possessed of the right to import slaves, as the public good did not require it to be taken from them, & as it was expedient to have as few objections as possible to the proposed scheme of Government, he thought it best to leave the matter as we find it. He observed that the abolition of slavery seemed to be going on in the U. S. & that the good sense of the several States would probably by degrees compleat it. He urged on the Convention the necessity of despatch[ing its business.]

Col. Mason.—This infernal trafic originated in the avarice of British Merchants. The British Govt. constantly checked the attempts of Virginia to put a stop to it. The present question concerns not the importing States alone but the whole Union....Every master of slaves is born a petty tyrant. They bring the judgment of heaven on a Country. As nations can not be rewarded or punished in the next world they must be in this. By an inevitable chain of causes & effects providence punishes national sins, by national calamities. He lamented that some of our Eastern brethren had from a lust of gain embarked in this nefarious traffic. As to the States being in possession of the Right to import, this was the case with many other rights, now to be properly given up. He held it essential in every point of view, that the Genl. Govt. should have power to prevent the increase of slavery.

Mr. Elsworth.—As he had never owned a slave could not judge of the effects of slavery on character. He said however that if it was to be considered in a moral light we ought to go farther and free those already in the Country.—As slaves also multiply so fast in Virginia & Maryland that it is cheaper to raise than import them....—Let us not intermeddle. As population increases; poor laborers will be so plenty as to render slaves useless. Slavery in time will not be a speck in our Country. Provision is already made in Connecticut for abolishing it. And the abolition has already taken place in Massachusetts....

Mr. Pinkney.—If slavery be wrong, it is justified by the example of all the world. He cited the case of Greece Rome & other antient States; the sanction given by France England, Holland & other modern States. In all ages one half of mankind have been slaves. If the [Southern] States were let alone they will probably of themselves stop importations....An attempt to take away the right as proposed will produce serious objections to the Constitution which he wished to see adopted.

General Pinkney declared it to be his firm opinion that if himself & all his colleagues were to sign the Constitution & use their personal influence, it would be of no avail towards obtaining the assent of their Constituents. S. Carolina & Georgia cannot do without slaves....

Mr. Wilson observed that if S. C. & Georgia were themselves disposed to get rid of the importation of slaves in a short time as had been suggested, they would never refuse to Unite because the importation might be prohibited.... Mr. Gerry thought we had nothing to do with the conduct of the States as to Slaves, but ought to be careful not to give any sanction to it.

Mr. Dickenson considered it as inadmissible on every principle of honor & safety that the importation of slaves should be authorized to the States by the Constitution. The true question was whether the national happiness would be promoted or impeded by the importation, and this question ought to be left to the National Govt. not to the States particularly interested.... He could not believe that the Southn. States would refuse to confederate on the account apprehended; especially as the power was not likely to be immediately exercised by the Genl. Government....

Mr. Langdon was strenuous for giving the power to the Genl. Govt. He [could] not with a good conscience leave it with the States who could then go on with the traffic, without being restrained by the opinions here given that they will themselves cease to import slaves.

Genl. Pinkney thought himself bound to declare candidly that he did not think S. Carolina would stop her importations of slaves in any short time, but only stop them occasionally as she now does....

Mr. Rutledge.—If the Convention thinks that N. C; S. C. & Georgia will ever agree to the plan, unless their right to import slaves be untouched, the every point of view, that the Genl. Govt. should have power to prevent the increase of slavery.

Mr. Elsworth.—As he had never owned a slave could not judge of the effects of slavery on character. He said however that if it was to be considered in a moral light we ought to go farther and free those already in the Country.—As slaves also multiply so fast in Virginia & Maryland that it is cheaper to raise than import them....—Let us not intermeddle. As population increases; poor laborers will be so plenty as to render slaves useless. Slavery in time will not be a speck in our Country. Provision is already made in Connecticut for abolishing it. And the abolition has already taken place in Massachusetts....

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given by France England, Holland & other modern States. In all ages one half of mankind have been slaves. If the [Southern] States were let alone they will probably of themselves stop importations....An attempt to take away the right as proposed will produce serious objections to the Constitution which he wished to see adopted.

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Genl. Pinkney thought himself bound to declare candidly that he did not think S. Carolina would stop her importations of slaves in any short time, but only stop them occasionally as she now does....

Mr. Rutledge.—If the Convention thinks that N. C; S. C. & Georgia will ever agree to the plan, unless their right to import slaves be untouched, the expectation is vain. The people of those States will never be such fools as to give up so important an interest....

Mr. Sherman said...he was opposed to a tax on slaves imported as making the matter worse, because it implied they were *property*. He acknowledged that if the power of prohibiting the importation should be given to the Genl. Government that it would be exercised. He thought it would be its duty to exercise the power....

Mr. Randolph was for committing in order that some middle ground might, if possible, be found. He could never agree to the clause as it stands. He [would] sooner risk the constitution—He dwelt on the dilemma to which the Convention was exposed. By agreeing to the clause, it would revolt the Quakers, the Methodists, and many others in the States having no slaves. On the other hand, two States might be lost to the Union. Let us then, he said, try the chance of a commitment....

Mr. Elsworth was for taking the plan as it is. This widening of opinions has a threatening aspect. If we do not agree on this middle & moderate ground he was afraid we should lose two States, with such others as may be disposed to stand aloof, should fly into a variety of shapes & directions, and most probably into several confederations and not without bloodshed....

Source: *The Records of the Federal Convention of 1787*, vol. 2, edited by Max Farrand (New Haven: Yale University Press, 1937), pp. 369–375.³

³ This document was given to all groups.

GROUPS B & D

Your topic is:

SLAVERY AND THE DECLARATION OF INDEPENDENCE

- 1. Based on the evidence in your *Document File*, describe the factor that caused a conflict among the delegates around this issue.**

- 2. Cite specific examples of evidence to support your description.**

- 3. Develop a solution to this issue. Predict how the delegates might have acted by writing a resolution to the Constitutional Convention describing your solution.**

Action of Second Continental Congress, July 4, 1776

The unanimous Declaration of the thirteen United States of America

WHEN in the Course of human Events,

it becomes necessary for one People to dissolve the Political Bands which have connected them with another, and to assume among the Powers of the Earth, the separate and equal Station to which the Laws of Nature and of Nature's God entitle them, a decent Respect to the Opinions of Mankind requires that they should declare the causes which impel them to the Separation.

WE hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness...

Quotes About Slavery from the Constitutional Convention

The morality or wisdom of slavery are considerations belonging to the States themselves
– What enriches a part enriches the whole, and the States are the best judges of heir particular interest.”

-- Oliver Ellsworth

“The security of the Southern States want is that their Negroes may not be taken from them which some gentlemen within or without doors, have a very good mind to do.”

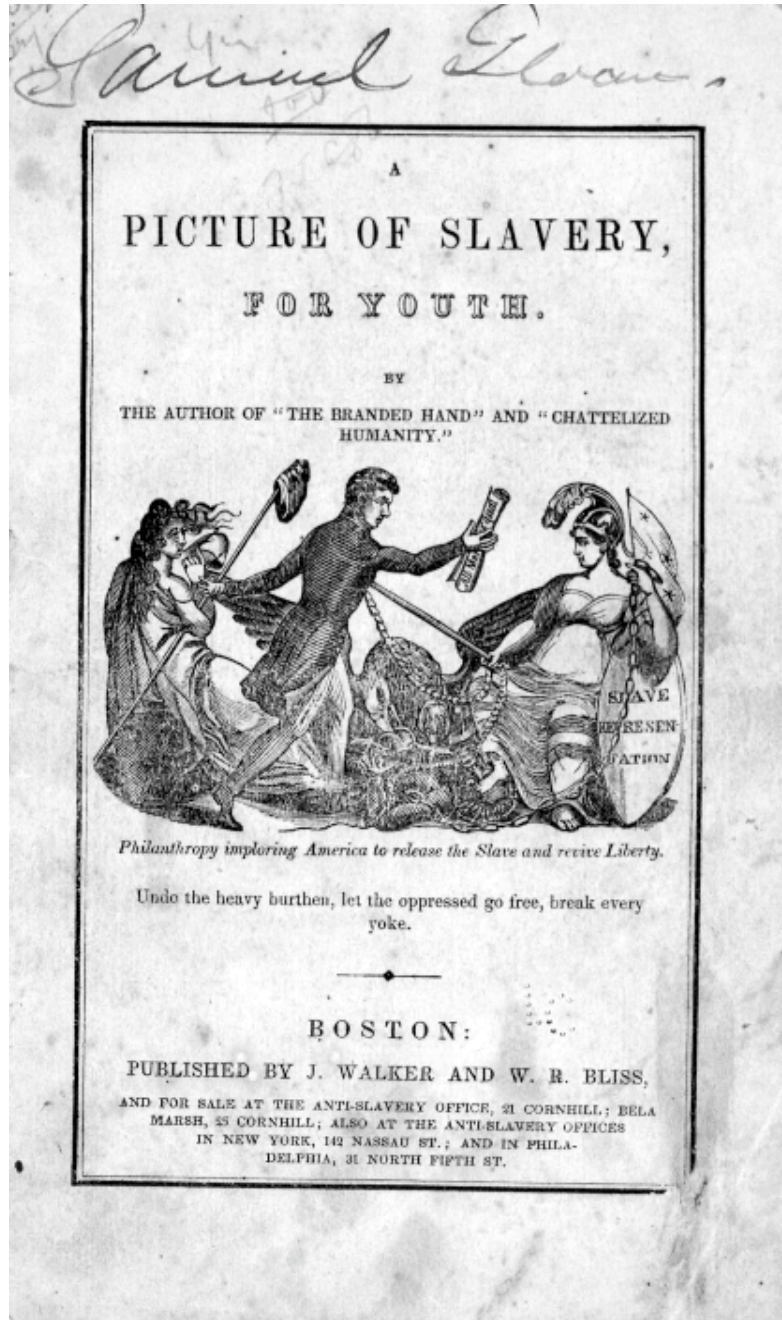
-- Pierce Butler

“Every master of slaves is born a petty tyrant. They bring the judgment of heaven on a Country. As nations can not be rewarded or punished in the next world they must be in this.”

-- George Mason

Source: James Madison’s *Notes*, transcribed nightly during the Constitutional Convention.

Cover of Children's Book on Slavery



Source: Library of Congress

GROUP E

Your topic is:

POWER OF CHIEF EXECUTIVE & HOW TO CHOOSE ONE

1. Based on the evidence in your *Document File*, describe the factor that caused a conflict among the delegates around this issue.

2. Cite specific examples of evidence to support your description.

3. Develop a solution to this issue. Predict how the delegates might have acted by writing a resolution to the Constitutional Convention describing your solution.

Quotes on Federalism

“As one of the people [I say], the National Govt. is mine, the State Govt. is mine—In transferring power from one to the other – I only take out of my left hand what is cannot so well use, and put into my right hand where it can be better used.”

-- John Langdon, New Hampshire

“The preservation of the States...is indispensable. It will produce that collision between the different authorities which should be wished for in order to check each other.”

-- John Dickinson

Quotes on Representative Democracy

“ The people can not know and judge of the characters of Candidates.”

-- John Francis Mercer, Maryland

“The rich man who enters into Society along with the poor man, gives up more than the poor man, yet with an equal vote he is equally safe. Were he to have more votes than the poor man...the rights of the poor man would immediately cease to be secure.”

-- Roger Sherman, Connecticut

Quotes on Separation of Powers

“A Government without a proper Executive (*president*) and Judiciary would be the mere trunk of a body without the arms or legs.”

-- James Madison, Virginia

“The purse and the sword must not be in the same hands.”

-- George Mason, Virginia

“[I cannot agree] in blending the national Judicial with the Executive, because one is the expounder (*creator*) and the other the Executor (*one who carries out*) of the Laws.”

Quotes on Presidency

“I am against enabling any one man to stop the will of the whole. No man could be found so far above all the rest in wisdom.”

-- Roger Sherman, Connecticut

“Some provision should be made for defending the community against the incapacity, negligence, or perfidity of the chief Magistrate.”

-- James Madison, Virginia

“A good magistrate will not fear [articles of impeachment.] A bad one ought to be kept in fear of them...”

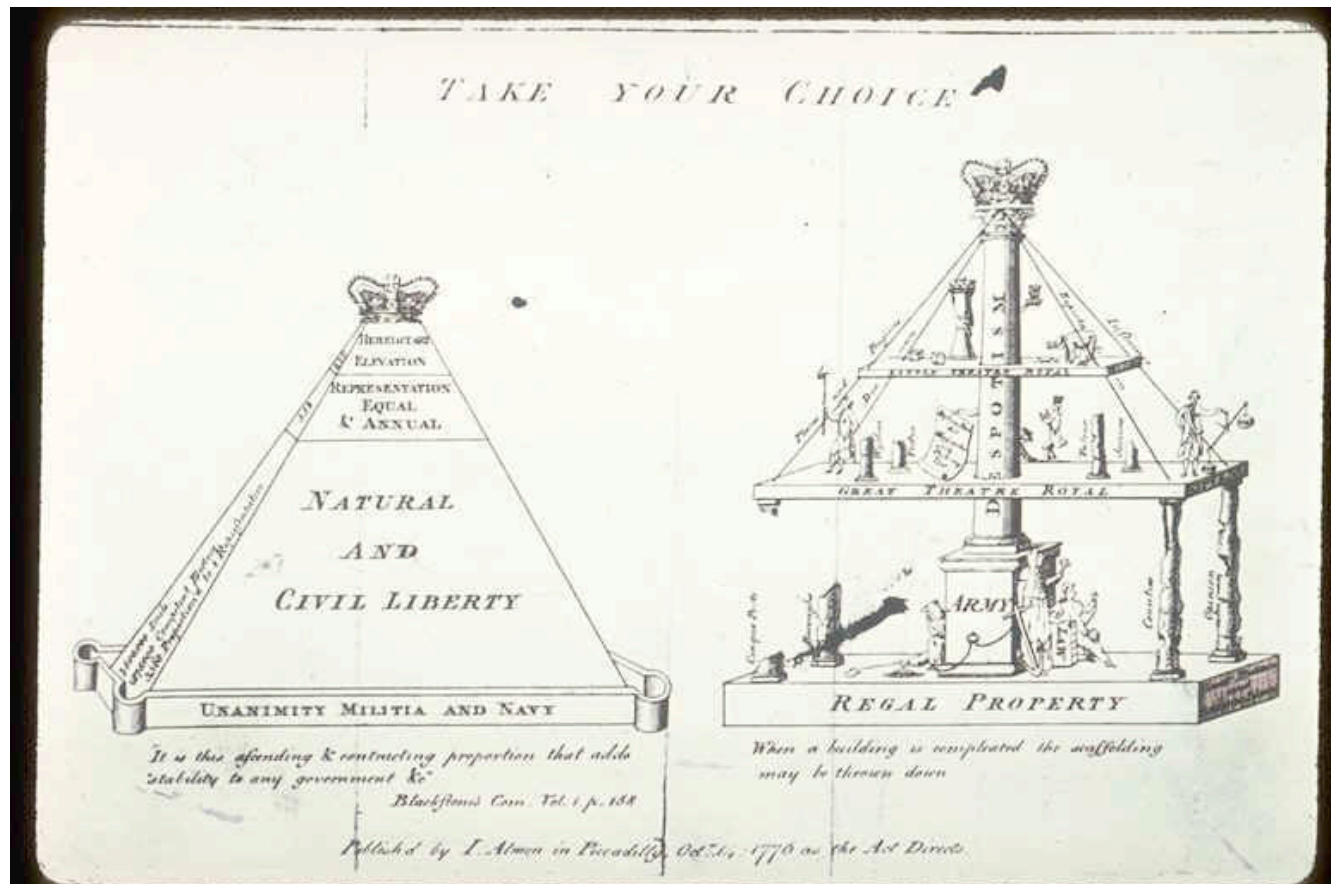
-- Elbridge Gerry, Massachusetts

Christy's Painting of the Signing of the Constitution



Source: Library of Congress

Cartoon Demonstrating the Differences between Democracy and Monarchy



Source: Library of Congress

What factors made the task to form a different government so difficult?⁴

FACTOR	EXPLANATION	EVIDENCE

⁴ This chart used with all groups.

RESULTS OF THE CONSTITUTIONAL CONVENTION

The delegates at the Constitutional Convention had to resolve many differences – or reach compromises -- in order to achieve success in designing a new form of government.

What were the results of their work?

Here is your task:

Each group is to design a drawing or *editorial cartoon* that demonstrates to other classmates what each of these compromises mean. Each should be descriptive enough to teach other students about the compromise. The drawing should have captions and other written text to assist the reader in understanding.

Group A:

THE VIRGINIA PLAN AND THE NEW JERSEY PLAN

Group B:

THE GREAT COMPROMISE

Group C:

THE THREE-FIFTHS COMPROMISE

Group D:

COMPROMISES ON TRADE

Group E:

ELECTING THE PRESIDENT

THE UNITED STATES CONSTITUTION

We the People of the United States, in Order to form a more perfect Union, establish Justice, insure domestic Tranquility, provide for the common defence, promote the general Welfare, and secure the Blessings of Liberty to ourselves and our Posterity, do ordain and establish this Constitution for the United States of America.

Article. I.

Section 1.

All legislative Powers herein granted shall be vested in a Congress of the United States, which shall consist of a Senate and House of Representatives.

Section. 2.

Clause 1: The House of Representatives shall be composed of Members chosen every second Year by the People of the several States, and the Electors in each State shall have the Qualifications requisite for Electors of the most numerous Branch of the State Legislature.

Clause 2: No Person shall be a Representative who shall not have attained to the Age of twenty five Years, and been seven Years a Citizen of the United States, and who shall not, when elected, be an Inhabitant of that State in which he shall be chosen.

Clause 3: Representatives and direct Taxes shall be apportioned among the several States which may be included within this Union, according to their respective Numbers, which shall be determined by adding to the whole Number of free Persons, including those bound to Service for a Term of Years, and excluding Indians not taxed, three fifths of all other Persons. (*See Note 2*) The actual Enumeration shall be made within three Years after the first Meeting of the Congress of the United States, and within every subsequent Term of ten Years, in such Manner as they shall by Law direct. The Number of Representatives shall not exceed one for every thirty Thousand, but each State shall have at Least one Representative; and until such enumeration shall be made, the State of New Hampshire shall be entitled to chuse three, Massachusetts eight, Rhode-Island and Providence Plantations one, Connecticut five, New-York six, New Jersey four, Pennsylvania eight, Delaware one, Maryland six, Virginia ten, North Carolina five, South Carolina five, and Georgia three.

Clause 4: When vacancies happen in the Representation from any State, the Executive Authority thereof shall issue Writs of Election to fill such Vacancies.

Clause 5: The House of Representatives shall chuse their Speaker and other Officers; and shall have the sole Power of Impeachment.

Section. 3.

Clause 1: The Senate of the United States shall be composed of two Senators from each State, chosen by the Legislature thereof, (*See Note 3*) for six Years; and each Senator shall have one Vote.

Clause 2: Immediately after they shall be assembled in Consequence of the first Election, they shall be divided as equally as may be into three Classes. The Seats of the Senators of the first Class shall be vacated at the Expiration of the second Year, of the second Class at the Expiration of the fourth Year, and of the third Class at the Expiration of the sixth Year, so that one third may be chosen every second Year; and if Vacancies happen by Resignation, or otherwise, during the Recess of the Legislature of any State, the Executive thereof may make temporary Appointments until the next Meeting of the Legislature, which shall then fill such Vacancies. (*See Note 4*)

Clause 3: No Person shall be a Senator who shall not have attained to the Age of thirty Years, and been nine Years a Citizen of the United States, and who shall not, when elected, be an Inhabitant of that State for which he shall be chosen.

Clause 4: The Vice President of the United States shall be President of the Senate, but shall have no Vote, unless they be equally divided.

Clause 5: The Senate shall chuse their other Officers, and also a President pro tempore, in the Absence of the Vice President, or when he shall exercise the Office of President of the United States.

Clause 6: The Senate shall have the sole Power to try all Impeachments. When sitting for that Purpose, they shall be on Oath or Affirmation. When the President of the United States is tried, the Chief Justice shall preside: And no Person shall be convicted without the Concurrence of two thirds of the Members present.

Clause 7: Judgment in Cases of Impeachment shall not extend further than to removal from Office, and disqualification to hold and enjoy any Office of honor, Trust or Profit under the United States: but the Party convicted shall nevertheless be liable and subject to Indictment, Trial, Judgment and Punishment, according to Law.

Section. 4.

Clause 1: The Times, Places and Manner of holding Elections for Senators and Representatives, shall be prescribed in each State by the Legislature thereof; but the Congress may at any time by Law make or alter such Regulations, except as to the Places of chusing Senators.

Clause 2: The Congress shall assemble at least once in every Year, and such Meeting shall be on the first Monday in December, (*See Note 5*) unless they shall by Law appoint a different Day.

Section. 5.

Clause 1: Each House shall be the Judge of the Elections, Returns and Qualifications of its own Members, and a Majority of each shall constitute a Quorum to do Business; but a smaller Number may adjourn from day to day, and may be authorized to compel the Attendance of absent Members, in such Manner, and under such Penalties as each House may provide.

Clause 2: Each House may determine the Rules of its Proceedings, punish its Members for disorderly Behaviour, and, with the Concurrence of two thirds, expel a Member.

Clause 3: Each House shall keep a Journal of its Proceedings, and from time to time publish the same, excepting such Parts as may in their Judgment require Secrecy; and the Yeas and Nays of the Members of either House on any question shall, at the Desire of one fifth of those Present, be entered on the Journal.

Clause 4: Neither House, during the Session of Congress, shall, without the Consent of the other, adjourn for more than three days, nor to any other Place than that in which the two Houses shall be sitting.

Section. 6.

Clause 1: The Senators and Representatives shall receive a Compensation for their Services, to be ascertained by Law, and paid out of the Treasury of the United States. *(See Note 6)* They shall in all Cases, except Treason, Felony and Breach of the Peace, be privileged from Arrest during their Attendance at the Session of their respective Houses, and in going to and returning from the same; and for any Speech or Debate in either House, they shall not be questioned in any other Place.

Clause 2: No Senator or Representative shall, during the Time for which he was elected, be appointed to any civil Office under the Authority of the United States, which shall have been created, or the Emoluments whereof shall have been encreased during such time; and no Person holding any Office under the United States, shall be a Member of either House during his Continuance in Office.

Section. 7.

Clause 1: All Bills for raising Revenue shall originate in the House of Representatives; but the Senate may propose or concur with Amendments as on other Bills.

Clause 2: Every Bill which shall have passed the House of Representatives and the Senate, shall, before it become a Law, be presented to the President of the United States; If he approve he shall sign it, but if not he shall return it, with his Objections to that House in which it shall have originated, who shall enter the Objections at large on their Journal, and proceed to reconsider it. If after such Reconsideration two thirds of that

House shall agree to pass the Bill, it shall be sent, together with the Objections, to the other House, by which it shall likewise be reconsidered, and if approved by two thirds of that House, it shall become a Law. But in all such Cases the Votes of both Houses shall be determined by yeas and Nays, and the Names of the Persons voting for and against the Bill shall be entered on the Journal of each House respectively. If any Bill shall not be returned by the President within ten Days (Sundays excepted) after it shall have been presented to him, the Same shall be a Law, in like Manner as if he had signed it, unless the Congress by their Adjournment prevent its Return, in which Case it shall not be a Law.

Clause 3: Every Order, Resolution, or Vote to which the Concurrence of the Senate and House of Representatives may be necessary (except on a question of Adjournment) shall be presented to the President of the United States; and before the Same shall take Effect, shall be approved by him, or being disapproved by him, shall be repassed by two thirds of the Senate and House of Representatives, according to the Rules and Limitations prescribed in the Case of a Bill.

Section. 8.

Clause 1: The Congress shall have Power To lay and collect Taxes, Duties, Imposts and Excises, to pay the Debts and provide for the common Defence and general Welfare of the United States; but all Duties, Imposts and Excises shall be uniform throughout the United States;

Clause 2: To borrow Money on the credit of the United States;

Clause 3: To regulate Commerce with foreign Nations, and among the several States, and with the Indian Tribes;

Clause 4: To establish an uniform Rule of Naturalization, and uniform Laws on the subject of Bankruptcies throughout the United States;

Clause 5: To coin Money, regulate the Value thereof, and of foreign Coin, and fix the Standard of Weights and Measures;

Clause 6: To provide for the Punishment of counterfeiting the Securities and current Coin of the United States;

Clause 7: To establish Post Offices and post Roads;

Clause 8: To promote the Progress of Science and useful Arts, by securing for limited Times to Authors and Inventors the exclusive Right to their respective Writings and Discoveries;

Clause 9: To constitute Tribunals inferior to the supreme Court;

Clause 10: To define and punish Piracies and Felonies committed on the high Seas, and Offences against the Law of Nations;

Clause 11: To declare War, grant Letters of Marque and Reprisal, and make Rules concerning Captures on Land and Water;

Clause 12: To raise and support Armies, but no Appropriation of Money to that Use shall be for a longer Term than two Years;

Clause 13: To provide and maintain a Navy;

Clause 14: To make Rules for the Government and Regulation of the land and naval Forces;

Clause 15: To provide for calling forth the Militia to execute the Laws of the Union, suppress Insurrections and repel Invasions;

Clause 16: To provide for organizing, arming, and disciplining, the Militia, and for governing such Part of them as may be employed in the Service of the United States, reserving to the States respectively, the Appointment of the Officers, and the Authority of training the Militia according to the discipline prescribed by Congress;

Clause 17: To exercise exclusive Legislation in all Cases whatsoever, over such District (not exceeding ten Miles square) as may, by Cession of particular States, and the Acceptance of Congress, become the Seat of the Government of the United States, and to exercise like Authority over all Places purchased by the Consent of the Legislature of the State in which the Same shall be, for the Erection of Forts, Magazines, Arsenals, dock-Yards, and other needful Buildings;--And

Clause 18: To make all Laws which shall be necessary and proper for carrying into Execution the foregoing Powers, and all other Powers vested by this Constitution in the Government of the United States, or in any Department or Officer thereof.

Section. 9.

Clause 1: The Migration or Importation of such Persons as any of the States now existing shall think proper to admit, shall not be prohibited by the Congress prior to the Year one thousand eight hundred and eight, but a Tax or duty may be imposed on such Importation, not exceeding ten dollars for each Person.

Clause 2: The Privilege of the Writ of Habeas Corpus shall not be suspended, unless when in Cases of Rebellion or Invasion the public Safety may require it.

Clause 3: No Bill of Attainder or ex post facto Law shall be passed.

Clause 4: No Capitation, or other direct, Tax shall be laid, unless in Proportion to the Census or Enumeration herein before directed to be taken. (*See Note 7*)

Clause 5: No Tax or Duty shall be laid on Articles exported from any State.

Clause 6: No Preference shall be given by any Regulation of Commerce or Revenue to the Ports of one State over those of another: nor shall Vessels bound to, or from, one State, be obliged to enter, clear, or pay Duties in another.

Clause 7: No Money shall be drawn from the Treasury, but in Consequence of Appropriations made by Law; and a regular Statement and Account of the Receipts and Expenditures of all public Money shall be published from time to time.

Clause 8: No Title of Nobility shall be granted by the United States: And no Person holding any Office of Profit or Trust under them, shall, without the Consent of the Congress, accept of any present, Emolument, Office, or Title, of any kind whatever, from any King, Prince, or foreign State.

Section. 10.

Clause 1: No State shall enter into any Treaty, Alliance, or Confederation; grant Letters of Marque and Reprisal; coin Money; emit Bills of Credit; make any Thing but gold and silver Coin a Tender in Payment of Debts; pass any Bill of Attainder, ex post facto Law, or Law impairing the Obligation of Contracts, or grant any Title of Nobility.

Clause 2: No State shall, without the Consent of the Congress, lay any Imposts or Duties on Imports or Exports, except what may be absolutely necessary for executing it's inspection Laws: and the net Produce of all Duties and Imposts, laid by any State on Imports or Exports, shall be for the Use of the Treasury of the United States; and all such Laws shall be subject to the Revision and Controul of the Congress.

Clause 3: No State shall, without the Consent of Congress, lay any Duty of Tonnage, keep Troops, or Ships of War in time of Peace, enter into any Agreement or Compact with another State, or with a foreign Power, or engage in War, unless actually invaded, or in such imminent Danger as will not admit of delay.

Article. II.

Section. 1.

Clause 1: The executive Power shall be vested in a President of the United States of America. He shall hold his Office during the Term of four Years, and, together with the Vice President, chosen for the same Term, be elected, as follows

Clause 2: Each State shall appoint, in such Manner as the Legislature thereof may direct, a Number of Electors, equal to the whole Number of Senators and Representatives to

which the State may be entitled in the Congress: but no Senator or Representative, or Person holding an Office of Trust or Profit under the United States, shall be appointed an Elector.

Clause 3: The Electors shall meet in their respective States, and vote by Ballot for two Persons, of whom one at least shall not be an Inhabitant of the same State with themselves. And they shall make a List of all the Persons voted for, and of the Number of Votes for each; which List they shall sign and certify, and transmit sealed to the Seat of the Government of the United States, directed to the President of the Senate. The President of the Senate shall, in the Presence of the Senate and House of Representatives, open all the Certificates, and the Votes shall then be counted. The Person having the greatest Number of Votes shall be the President, if such Number be a Majority of the whole Number of Electors appointed; and if there be more than one who have such Majority, and have an equal Number of Votes, then the House of Representatives shall immediately chuse by Ballot one of them for President; and if no Person have a Majority, then from the five highest on the List the said House shall in like Manner chuse the President. But in chusing the President, the Votes shall be taken by States, the Representation from each State having one Vote; A quorum for this Purpose shall consist of a Member or Members from two thirds of the States, and a Majority of all the States shall be necessary to a Choice. In every Case, after the Choice of the President, the Person having the greatest Number of Votes of the Electors shall be the Vice President. But if there should remain two or more who have equal Votes, the Senate shall chuse from them by Ballot the Vice President. *(See Note 8)*

Clause 4: The Congress may determine the Time of chusing the Electors, and the Day on which they shall give their Votes; which Day shall be the same throughout the United States.

Clause 5: No Person except a natural born Citizen, or a Citizen of the United States, at the time of the Adoption of this Constitution, shall be eligible to the Office of President; neither shall any Person be eligible to that Office who shall not have attained to the Age of thirty five Years, and been fourteen Years a Resident within the United States.

Clause 6: In Case of the Removal of the President from Office, or of his Death, Resignation, or Inability to discharge the Powers and Duties of the said Office, *(See Note 9)* the Same shall devolve on the VicePresident, and the Congress may by Law provide for the Case of Removal, Death, Resignation or Inability, both of the President and Vice President, declaring what Officer shall then act as President, and such Officer shall act accordingly, until the Disability be removed, or a President shall be elected.

Clause 7: The President shall, at stated Times, receive for his Services, a Compensation, which shall neither be encreased nor diminished during the Period for which he shall have been elected, and he shall not receive within that Period any other Emolument from the United States, or any of them.

Clause 8: Before he enter on the Execution of his Office, he shall take the following Oath or Affirmation:--"I do solemnly swear (or affirm) that I will faithfully execute the Office of President of the United States, and will to the best of my Ability, preserve, protect and defend the Constitution of the United States."

Section. 2.

Clause 1: The President shall be Commander in Chief of the Army and Navy of the United States, and of the Militia of the several States, when called into the actual Service of the United States; he may require the Opinion, in writing, of the principal Officer in each of the executive Departments, upon any Subject relating to the Duties of their respective Offices, and he shall have Power to grant Reprieves and Pardons for Offences against the United States, except in Cases of Impeachment.

Clause 2: He shall have Power, by and with the Advice and Consent of the Senate, to make Treaties, provided two thirds of the Senators present concur; and he shall nominate, and by and with the Advice and Consent of the Senate, shall appoint Ambassadors, other public Ministers and Consuls, Judges of the supreme Court, and all other Officers of the United States, whose Appointments are not herein otherwise provided for, and which shall be established by Law: but the Congress may by Law vest the Appointment of such inferior Officers, as they think proper, in the President alone, in the Courts of Law, or in the Heads of Departments.

Clause 3: The President shall have Power to fill up all Vacancies that may happen during the Recess of the Senate, by granting Commissions which shall expire at the End of their next Session.

Section. 3.

He shall from time to time give to the Congress Information of the State of the Union, and recommend to their Consideration such Measures as he shall judge necessary and expedient; he may, on extraordinary Occasions, convene both Houses, or either of them, and in Case of Disagreement between them, with Respect to the Time of Adjournment, he may adjourn them to such Time as he shall think proper; he shall receive Ambassadors and other public Ministers; he shall take Care that the Laws be faithfully executed, and shall Commission all the Officers of the United States.

Section. 4.

The President, Vice President and all civil Officers of the United States, shall be removed from Office on Impeachment for, and Conviction of, Treason, Bribery, or other high Crimes and Misdemeanors.

Article. III.

Section. 1.

The judicial Power of the United States, shall be vested in one supreme Court, and in such inferior Courts as the Congress may from time to time ordain and establish. The Judges, both of the supreme and inferior Courts, shall hold their Offices during good Behaviour, and shall, at stated Times, receive for their Services, a Compensation, which shall not be diminished during their Continuance in Office.

Section. 2.

Clause 1: The judicial Power shall extend to all Cases, in Law and Equity, arising under this Constitution, the Laws of the United States, and Treaties made, or which shall be made, under their Authority;--to all Cases affecting Ambassadors, other public Ministers and Consuls;--to all Cases of admiralty and maritime Jurisdiction;--to Controversies to which the United States shall be a Party;--to Controversies between two or more States;--between a State and Citizens of another State; (*See Note 10*)--between Citizens of different States, --between Citizens of the same State claiming Lands under Grants of different States, and between a State, or the Citizens thereof, and foreign States, Citizens or Subjects.

Clause 2: In all Cases affecting Ambassadors, other public Ministers and Consuls, and those in which a State shall be Party, the supreme Court shall have original Jurisdiction. In all the other Cases before mentioned, the supreme Court shall have appellate Jurisdiction, both as to Law and Fact, with such Exceptions, and under such Regulations as the Congress shall make.

Clause 3: The Trial of all Crimes, except in Cases of Impeachment, shall be by Jury; and such Trial shall be held in the State where the said Crimes shall have been committed; but when not committed within any State, the Trial shall be at such Place or Places as the Congress may by Law have directed.

Section. 3.

Clause 1: Treason against the United States, shall consist only in levying War against them, or in adhering to their Enemies, giving them Aid and Comfort. No Person shall be convicted of Treason unless on the Testimony of two Witnesses to the same overt Act, or on Confession in open Court.

Clause 2: The Congress shall have Power to declare the Punishment of Treason, but no Attainder of Treason shall work Corruption of Blood, or Forfeiture except during the Life of the Person attainted.

Article. IV.

Section. 1.

Full Faith and Credit shall be given in each State to the public Acts, Records, and judicial Proceedings of every other State. And the Congress may by general Laws prescribe the Manner in which such Acts, Records and Proceedings shall be proved, and the Effect thereof.

Section. 2.

Clause 1: The Citizens of each State shall be entitled to all Privileges and Immunities of Citizens in the several States.

Clause 2: A Person charged in any State with Treason, Felony, or other Crime, who shall flee from Justice, and be found in another State, shall on Demand of the executive Authority of the State from which he fled, be delivered up, to be removed to the State having Jurisdiction of the Crime.

Clause 3: No Person held to Service or Labour in one State, under the Laws thereof, escaping into another, shall, in Consequence of any Law or Regulation therein, be discharged from such Service or Labour, but shall be delivered up on Claim of the Party to whom such Service or Labour may be due. *(See Note 11)*

Section. 3.

Clause 1: New States may be admitted by the Congress into this Union; but no new State shall be formed or erected within the Jurisdiction of any other State; nor any State be formed by the Junction of two or more States, or Parts of States, without the Consent of the Legislatures of the States concerned as well as of the Congress.

Clause 2: The Congress shall have Power to dispose of and make all needful Rules and Regulations respecting the Territory or other Property belonging to the United States; and nothing in this Constitution shall be so construed as to Prejudice any Claims of the United States, or of any particular State.

Section. 4.

The United States shall guarantee to every State in this Union a Republican Form of Government, and shall protect each of them against Invasion; and on Application of the Legislature, or of the Executive (when the Legislature cannot be convened) against domestic Violence.

Article. V.

The Congress, whenever two thirds of both Houses shall deem it necessary, shall propose [Amendments](#) to this Constitution, or, on the Application of the Legislatures of two thirds of the several States, shall call a Convention for proposing Amendments, which, in either Case, shall be valid to all Intents and Purposes, as Part of this Constitution, when ratified by the Legislatures of three fourths of the several States, or by Conventions in three

fourths thereof, as the one or the other Mode of Ratification may be proposed by the Congress; Provided that no Amendment which may be made prior to the Year One thousand eight hundred and eight shall in any Manner affect the first and fourth Clauses in the Ninth Section of the first Article; and that no State, without its Consent, shall be deprived of its equal Suffrage in the Senate.

Article. VI.

Clause 1: All Debts contracted and Engagements entered into, before the Adoption of this Constitution, shall be as valid against the United States under this Constitution, as under the Confederation.

Clause 2: This Constitution, and the Laws of the United States which shall be made in Pursuance thereof; and all Treaties made, or which shall be made, under the Authority of the United States, shall be the supreme Law of the Land; and the Judges in every State shall be bound thereby, any Thing in the Constitution or Laws of any State to the Contrary notwithstanding.

Clause 3: The Senators and Representatives before mentioned, and the Members of the several State Legislatures, and all executive and judicial Officers, both of the United States and of the several States, shall be bound by Oath or Affirmation, to support this Constitution; but no religious Test shall ever be required as a Qualification to any Office or public Trust under the United States.

Article. VII.

The Ratification of the Conventions of nine States, shall be sufficient for the Establishment of this Constitution between the States so ratifying the Same.

done in Convention by the Unanimous Consent of the States present the Seventeenth Day of September in the Year of our Lord one thousand seven hundred and Eighty seven and of the Independence of the United States of America the Twelfth In witness whereof We have hereunto subscribed our Names,

GO WASHINGTON--Presidt. and deputy from Virginia

[Signed also by the deputies of twelve States.]

Delaware

Maryland

Geo: Read

James MCHenry

Gunning Bedford jun

Dan of ST ThoS. Jenifer

John Dickinson

DanL Carroll.

Richard Bassett

Jaco: Broom

Virginia

John Blair--
James Madison Jr.

South Carolina

J. Rutledge
Charles 1ACotesworth Pinckney
Charles Pinckney
Pierce Butler.

New Hampshire

John Langdon
Nicholas Gilman

Connecticut

WM. SamL. Johnson
Roger Sherman

New Jersey

Wil: Livingston
David Brearley.
WM. Paterson.
Jona: Dayton

North Carolina

WM Blount
RichD. Dobbs Spaight.
Hu Williamson

Georgia

William Few
Abr Baldwin

Massachusetts

Nathaniel Gorham
Rufus King

New York

Alexander Hamilton

Pennsylvania

B Franklin
Thomas Mifflin
RobT Morris
Geo. Clymer
ThoS. FitzSimons
Jared Ingersoll
James Wilson
Gouv Morris

Attest William Jackson Secretary

Writing Assignment

Worth 16 points based on 4-level rubric

Resolving Differences at the Constitutional Convention

Step A:

Read pages 241-243 in Why We Remember by Herman Viola

Step B:

Construct a *Well-Developed Response* to the following question:

Based on the reading in your textbook, how does your analysis of the issue and your recommended solution compare to what actually occurred?

Follow the recommendations below as you write your essay.

In the first paragraph:

1. Write a topic sentence that reconstructs the question and makes a *claim* about how your ideas compare to those in the textbook.
2. Re-state your group's analysis of the issue.
3. Compare your group's analysis to Viola's. How does he describe the issue?

In the second paragraph:

4. Re-state your group's solution/resolution to the issue.
5. Compare your resolution to Viola's description of what actually happened.
6. Describe *why you believe* that the delegates made the decision that they made. Support this with facts/evidence from the document file.

**Appendix G: Sample Interview Questions for Open-Ended Interview
With Sample Group**

Instructions: “I am going to be asking you some questions about history, and am very interested to hear what you have to say. When I say ‘history,’ realize that I am asking about the history that you learn in your social studies classes. There are no correct or incorrect answers to these questions. I would like you to simply answer the questions honestly.”

1. I want you to describe what it was like learning history when I taught your class.
2. Can you describe some thing you recall about American History from the class?
3. In what ways was learning history different when I taught your class. Compare this to some of the other learning experiences you’ve had.
4. What was the most difficult thing for you about the class?
5. What was it like for you working in the groups?
6. If you were to give some advice to history teachers, what would it be?

Appendix H: Interview Questions for Participating Teacher

Directions: This is an open-ended interview. I will be asking some rather broad questions in order to gain your perspectives on the research that I have conducted in your classroom.

1. Describe your overall impressions about how the students reacted to the methods of instruction that I was using in your classroom.
2. What kinds of skills do you feel the students learned?
3. What is your opinion about the balance between content and skills that students learned?
4. What was it like for you as a teacher to observe your students being taught through an inquiry approach?
5. What did you learn about teaching or student learning over the course of this study?
6. How might you advise a teacher who is contemplating using these teaching methods with their students?

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