

Keep Calm and Contextualize: One Preservice Teacher's Use of Historical Contextualization  
in the Middle School Classroom

By

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requirements for the degree of Doctor of Education.

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## Abstract

It is difficult to overestimate the importance of a history teacher's ability to historically contextualize primary sources. Contextualization gives life to primary sources that many students feel are flat and lifeless. Moreover, due to their limited experience and knowledge, preservice teachers often lack the sophistication to thematically conceive of and act on historical content, inhibiting their ability to historically contextualize primary sources.

As such, this study investigated how one preservice teacher historically contextualized primary sources for herself and for her 8<sup>th</sup> grade U.S. history students and what her pedagogical use of these primary sources revealed about how she historically contextualized such sources. Utilizing a constructivist theoretical framework as a critical lens to examine ways in which she conceptualized her use of primary sources for her students, data was collected via face-to-face interviews, written questionnaires, and video recordings throughout this ten week study.

Ultimately, the preservice teacher presented an episodic view of history in which she presented historical content with an emphasis on events, rather than on the connection of such events to broader historical themes and developments. This revealed itself through her continued short-term contextualization of primary sources despite showing knowledge of historical content that matched a long-term contextualization during her interviews. She also presented historical content to students through the lens of simple cause and effect, although during interviews she explained her thinking about historical events within the context of continuity and change.

For my mom.

Of all the inspirations in my life,

you are by far, my greatest. UC

## Acknowledgments

Although it may be commonplace to say so, it is nevertheless true that this dissertation would not exist without the support of many people. First, I must express my heartfelt appreciation to the participant in this case study who readily granted me access to into her internal dialogue as it applied to her experiences in my classroom. She willingly stepped into this vulnerable space and did so with grace and humility.

To my advisor, Dr. O'Brien – or as we all know him – "Joe", I hope that you might be as proud to be my mentor as I am to be your mentee. Your guidance has brought me to this place through false starts, hesitations, and enough emails to drive a man crazy. Your dedication to your students has always served as a model I strive to recreate in my own teaching. I would not be here without you.

I am grateful for the abundance of guidance, inspiration, and support that I received from my dissertation committee. I benefited immeasurably from the wisdom and insight of each my committee members.

This study would have not been conceived without the academic role model that is my father. Twenty-eight years ago, he received his doctorate from the University of Kansas, and for as long as I can remember I have viewed that feat as a professional accomplishment worth achieving. As a kid, I would walk around beaming with pride knowing that my dad was "Dr. Orlando". Perhaps someday my kid will feel the same way.

The most important things in life are family and love, and I have been lucky enough to have more of both than most people. Therefore, I must thank other members of my

loving family – to my sister Alyssa, who is the greatest adventurer I know; to my brother Ross, who excels in kindness and height; to my step-dad Kevin, who’s gregarious and generous nature I have always admired and tried to emulate; and to Meaghan, who waltzed into my life at just the right time.

Lastly, I pursued this doctoral program out of professional ambition and because of the intellectual challenge and interest that it provided. But everything I do, I also do because of my mom. She has always been a glowing example of how to make the most of life – of how to not complain about the wind, but to adjust your sails, and have a lot of fun doing it. At times, my mom has doubted how much she has helped me achieve my doctoral degree, but she taught me how to work hard and how to have a flexible mindset – the two most important skills in writing a dissertation. Being raised by her is like an ongoing apprenticeship in the art of being a decent human being. Dissertation or not, these lessons I learned and continue to learn will follow me forever. Thanks mom. I love you.

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## Chapter One: Introduction

Claire (all names of people and places are pseudonyms) let out an audible groan as she finished reading Roxanne's response paragraph. During the third week of her preservice teaching placement, Claire had assigned her 8<sup>th</sup> grade U.S. history students to read George Washington's farewell address. In it, he suggested that Americans fight the urge to form alliances with other countries, resist the temptation to form political parties, and to unify the North and the South. It is important to note that he did not suggest that middle school students analyze primary source documents—apparently an equally arduous task.

Claire was an organized, thoughtful, and hardworking preservice teacher, but she still felt the pangs of frustration when she tried to engage students in primary sources. In her methods classes, her professors championed the notion that using primary sources in the classroom promoted "historical thinking" and critical thinking within students. She had conscientiously differentiated the primary sources by lexile score to more accurately match texts to students' reading levels and ensure each student could "access the curriculum"—another phrase her professors loved—regardless of reading ability.

Alas, her students still struggled to make the kinds of connections and inferences that are the rewards of working with primary sources. Without those minor epiphanies throughout the analysis process, evaluating primary source documents ceases to be a transformational endeavor that can unlock for students a genuine interest in history. Roxanne, a bright and social student, summed up the mood of the class by muttering what everyone was feeling. "This is boring.... Why do we need to read this again?"

There has been a great deal of research dedicated to the experiences of preservice teachers. Social studies education demands that preservice teachers have particular orientations to curriculum and teaching to their subject field. Furthermore, much has been written in journals such as *Social Education*, the flagship journal of the National Council for the Social Studies (NCSS), about methods of how social studies teachers can use primary sources. Within the nexus of these two fields rests preservice teachers working in history classrooms. Relatively little attention has been paid to this overlap. How is a preservice teacher, one with very little experience with students and with curriculum, supposed to make sense of his or her teaching as it relates to the use of historical primary sources?

Preservice teachers have long struggled to teach historical inquiry skills through the use of primary sources (Mayer, 2006). Classroom teachers who have worked closely with preservice teachers and observed others will have surely witnessed this phenomenon. Preservice teachers often seem intimidated by the thought of utilizing primary sources during their student teaching placement. This is troublesome because teachers who continually utilize primary sources in their instruction provide their students with opportunities to engage in historical thinking (Morgan & Rasinski, 2012; Neumann, 2012; Okolo, Ferretti, & MacArthur, 2007; Salinas, Bellows & Liaw, 2011). When students work with primary sources, they will most likely “source” the document—meaning that they will consider its origins to help make sense of it (Wineburg, 1991). Contextualizing history is at the core of historical thinking and it requires making connections between historical eras and circumstances. Of Wineburg’s three heuristics (sourcing, contextualization, and corroboration), contextualization is the most complex. Because of this, preservice teachers often struggle to engage in historical contextualization of primary sources.

This qualitative case study (Merriam, 2001; Stake, 2005) explored how Claire, a preservice teacher, was able to historically contextualize sources of historical evidence and what her pedagogical use of primary sources revealed about how she historically contextualized such sources. In doing so, this study was situated within the larger context of pedagogical content knowledge (PCK) and the relatively scarce research on preservice teachers and PCK. This study, which explored the ways in which a preservice teacher thought about her use of primary sources in an 8<sup>th</sup> grade U.S. history classroom, was framed through the following research questions:

(1) How does a preservice teacher historically contextualize primary sources for herself and for her 8<sup>th</sup> grade U.S. history students?

(2) What does her pedagogical use of primary sources with her 8<sup>th</sup> grade U.S. history students reveal about how she historically contextualizes such sources?

### **Case Study Approach and Theoretical Framework**

This study utilized a constructivist theoretical framework as a critical lens to examine ways in which Claire conceptualized her use of primary sources in the classroom. Throughout the study, as Claire worked with primary sources she was engaging in a meaning making process. This is aligned to constructivism, which describes “knowing” and how one “comes to know” and to pedagogical content knowledge (Jonassen, 1991). The essence of PCK asks teachers to draw upon several bodies of knowledge, skills, and experiences to make sense of their teaching and to better be able to transform what they are expected to teach in a way that makes sense to students (Shulman, 1987). For this

particular study, Claire relearned and transformed information, constructed hypotheses, made decisions, and relied on a cognitive structure that she may have previously been unaware of relative to her understanding of history and how to transform her historical knowledge into something understandable by students. This structure helped her organize and provide meaning to her experiences in the classroom (Steffe & Ulrich, 2014).

In order to deeply explore Claire's thinking about her use of primary sources, this study utilized a case study approach (Merriam, 2001; Stake, 2005). According to Yin (2012) case studies are appropriate to use when one's research question "addresses either a descriptive question — 'What is happening or has happened?' — or an explanatory question — 'How or why did something happen?'" This study's research questions were both descriptive and aimed at understanding how a preservice teacher conceptualized her use of primary sources in a U.S. history classroom throughout the course of one semester. Furthermore, Yin (2012) notes: "A 'case' is generally a bounded entity (a person, organization, behavioral condition, event, or other social phenomenon), but the boundary between the case and its contextual conditions—in both spatial and temporal dimensions—may be blurred, as previously noted" (p. 6). This discussion of boundaries is pertinent to this study because at times Claire straddled the boundary between "student" and "teacher". Eventually, students looked to her as an authority figure — a teacher — though she was very much still a "student" teacher who was constantly engaging in teaching activities for the first time. Because of this, I needed to act both as a classroom teacher and Clinical Supervisor as well as a researcher.

A case study approach favors the collection of data in natural settings because it emphasizes the study of a phenomenon within its real-world context (Yin, 2012). This

study explored ways in which Claire thought about her use of primary sources within the natural setting of an 8<sup>th</sup> grade U.S. history classroom. Though this study utilized “derived data” (Bromley, 1986, p. 23) through the use of frequent questionnaires, it also conducted original fieldwork through the use of observation of Claire in the classroom and during debriefing meetings. This helped enhance my understanding of how she conceptualized her use of primary sources.

### **Definitions and Usage of Key Terminology**

The following terms are central to the understanding of my inquiry. Though they will be further clarified and contextualized in later chapters, particularly within in the review of literature in Chapter Two, some brief definitions now will help to frame the study moving forward.

**Historical Thinking:** In Chapter Two, various authors’ definitions of historical thinking are presented. Though these definitions differ, the notion of asking critical questions and analyzing primary sources in hopes of giving meaning to the past resonates in nearly all explanations of historical thinking. However, for the purpose of this study, a definition of historical thinking provided by Salinas, Bellows and Liaw (2011) will be used. They describe historical thinking as reflecting, synthesizing, and constructing understandings of history based on evidence (2011).

**Historical Contextualization.** This is the ability to situate a historical phenomenon or person in a temporal, spatial, and social context to describe, explain, compare, or evaluate it (van Drie and van Boxtel, 2008). For the purposes of this study, historical contextualization will refer to Claire’s ability to do this relative to a primary source or piece of historical evidence.

**Historical Agency.** A tool that provides connections between the historical agents' choices and decisions in the past, and their relevance for students' choices and decisions in the present.

**Episodic Presentation of History.** This refers to the act of presenting historical content with an emphasis on events, rather than on the connection of such events to broader historical themes and developments. Associated with this presentation of history is the notion that change is something that happened in the past terms of things that happened suddenly which caused change, rather than slow, unfolding, and non-observable change" (Lee and Cercadillo, 2013).

**Primary Source.** Several definitions and misconceptions about this term are outlined in Chapter Two. However, throughout this study the term *primary source* is used to refer to "persons, places or things that provide firsthand information about something" (U.S. Department of Education, 2015).

**Pedagogical Content Knowledge.** The knowledge of how to best teach primary sources is an example of Shulman's constructivist conception of pedagogical content knowledge (1987). Most accurately described as "that special amalgam of content and pedagogy that is uniquely the province of teachers, their own special form of professional understanding", it is inexorably tied to the teaching and analysis of primary sources (p. 8).

**Case Study:** This study utilized a case study approach, which will help me gain understanding into a particular "case". Yin's (2009) definition of a case study is used: "An empirical inquiry about a contemporary phenomenon (e.g., a "case"), set within its real-world context—especially when the boundaries between phenomenon and context are not clearly evident (p. 18).

**Clinical Supervisor.** One who teaches children or adolescents and also supervises teacher education candidates. The Clinical Supervisor plays one of the most important roles in the final stages of teacher preparation. Not only does the Clinical Supervisor help provide direct clinical experiences by inviting the teacher education candidate into her or his classroom, but she or he also serves as a teacher and mentor (School of Education, 2012)

**University Supervisor:** The School of Education's representative who is responsible for supervising the teacher education candidate. The University Supervisor is both a facilitator and a teacher - conferencing, instructing, and evaluating (University of Kansas School of Education, 2012).

**Preservice Teacher:** A student who is studying to be a teacher and who, as a part of their training, observes classroom instruction and does closely supervised teaching in an elementary or secondary school. The teacher education candidate works daily with the Clinical Supervisor and reports to a School of Education assigned University Supervisor.

**Student Teaching Placement:** The sixteen-week experience that middle and secondary students—known as preservice teachers—complete during the spring semester of their senior year.

### **Organization of the Dissertation**

Following this introduction, Chapter Two provides a review of literature, which situates the study within three conceptual strands of scholarship: (1) pedagogical content knowledge; (2) in-service teacher and preservice teacher reflection; (3) teachers' and preservice teachers' use of primary sources; and (4) historical contextualization of primary sources. Chapter Two concludes with a discussion of the connection between these

strands. Viewing the preservice teaching experience throughout a constructivist lens helps to highlight those instances when Claire drew upon several bodies of knowledge, skills and experience to make sense of her teaching and transformed what she was expected to teach in a way that made sense to her students.

Chapter Three provides an overview of methodology, including a discussion of the research design and the case study methodology that structured it (Merriam, 2001; Stake, 2005, Yin, 2012). Next, is an outline of the research questions and a description of the data collection, setting, context, and participants utilized for this study. Lastly, Chapter Three concludes by explaining the deductive analysis techniques that are used.

Chapter Four presents the research findings of the study which focus on Claire's use of an episodic presentation of historical content. Within this episodic approach several smaller findings will be discussed. These include her successfully providing short-term contextualization primary sources, the discrepancy between the short-term contextualization that she provided for her students and her knowledge of long-term contextualization that she displayed during interviews, her tendency to use simple cause and effect rather than continuity and change to describe events in the past for her students, and her struggle to synthesize the two themes that held together the time period she was teaching – Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s. Such findings will be organized by themes and focused on the research questions.

Chapter Five discusses the implications of the major finding that Claire used an episodic presentation of historical content. Specifically, I will describe how Claire's use of a short-term contextualization and simple cause and effect helped create her episodic

presentation of the past and the impact of presenting history episodically to middle school students. Lastly, I will pose three unanswered questions that arose from this study.

## Chapter Two: Literature Review

### Introduction

Research indicates that while students benefit from using several heuristics when using primary sources, they struggle the most with historical contextualization (Seixas, Morton, Colver, & Fornazzari, 2013). From drawing distinctions between what occurred at a time in history and similar issues today, to imbuing historical figures with agency so as to better the past and present relationships between structural forces and individuals' actions, the value of students learning to historically contextualize primary sources cannot be overstated. (Clark, 2014). In the context of PCK, this proves problematic for preservice teachers learning to teach with primary sources because they not only lack PCK, but are relatively limited in their content and pedagogical knowledge. This means they will likely struggle with historically contextualizing primary sources and aligning student use of such sources with relevant teaching practices, such as promoting historical thinking.

Throughout this chapter various authors' definitions of historical thinking are presented. Though these definitions differ, the notion of asking critical questions and analyzing primary sources in hopes of giving meaning to the past resonates in nearly all explanations of historical thinking. Wineburg's (1991) contextualizing, sourcing, and corroboration heuristics and Van Sledright's (2004) work provide a protocol for students working with primary sources, while Neumann (2012) proposes an instructional approach for preservice teachers to help teach with primary sources. Focus is paid to the importance of and difficulty in teaching historical contextualization.

The knowledge of how to best teach primary sources is an example of Shulman's constructivist conception of pedagogical content knowledge (1987). Most accurately

described as “that special amalgam of content and pedagogy that is uniquely the province of teachers, their own special form of professional understanding”, it is inexorably tied to the teaching and analysis of primary sources (p. 8). This chapter contains a review of the most pertinent studies related to pedagogical content knowledge, with a special emphasis on pedagogical content knowledge of U.S. history teachers and preservice teachers.

In order to most deeply understand how a preservice teacher historical contextualizes primary sources, it is also imperative to understand the reflective processes that teachers may undergo. This chapter begins by focusing on the difficulty in operationalizing the concept of reflection due to the myriad of definitions of reflection that exist within the literature. Specific reflective thinking skills are then outlined and explained, highlighting the semantic differences that authors use when describing them. This is followed by an analysis of how reflection can benefit teachers. And lastly, the chapter concludes with a discussion of the shortcomings of the existing reflection framework found in the literature, emphasizing the lack of attention paid to how teachers situate their thinking within the context of their practice.

### **Primary Sources**

There seems to be a general agreement of what constitutes a primary source. The U.S. Department of Education defines primary sources as “persons, places or things that provide firsthand information about something” (2015). Morgan and Rasinski (2012) define primary sources as original textual and nontextual information that can help one learn about a person, particular event or time period. In its definition of primary sources, the Library of Congress (n.d.) emphasizes that primary sources be unaltered, describing them as “raw materials of history” providing “unfiltered access” into the past. These differ

from secondary sources, which highlight “accounts or interpretations of events created by someone without firsthand experience” (Library of Congress, n.d.). The salient descriptor of these definitions is a primary source’s proximity to the topic of investigation. It has not been modified, thereby giving its audience an authentic look at a particular subject.

The notion that primary sources have a wealth of potential for use in the classroom began in the 1960s in an effort to reform history education (Weber, 2012). Since this time, the idea that when students utilize primary sources they will deepen their thinking has become the norm (Gradwell, 2010). The Common Core Standards were developed, in part, to provide opportunities for students to seek “wide, deep and thoughtful engagement” with texts (Common Core, 2010, p. 3). Working with primary sources is way that teachers can provide more of these opportunities to their students. The Kansas Standards for History, Government, and Social Studies state that effective instruction includes the use of primary sources, as these sources provide “the opportunity for students to recognize the discipline’s subjective nature, directly touch the lives of people in the past, and develop high-level analytical skills” (2013).

The amount of online primary source material has dramatically increased throughout the last fifteen years (Liaw, 2010). This has allowed teachers to bring resources into their classrooms that would have previously been impossible to access. Tally and Goldbenberg (2005) argue that these online primary source resources or “OPSR” could be a means to improve student learning and historical thinking. Using online primary source documents in the classroom can allow a student to become “the novice in the archive”, with the ability to use skills that mirror those used by practitioners in the field, yet as novices rather than experts (Tally Goldenberg, 2005). This abundance of material

and convenience in accessing it has led many to believe that it will play an important role in the improvement of education of all levels (Tally & Goldenberg, 2005).

**Benefits of Using Primary Sources.** Teachers who continually utilize primary sources in their instruction provide their students with opportunities to engage in historical thinking (Morgan & Rasinski, 2012; Neumann, 2012; Okolo, Ferretti, & MacArthur, 2007; Salinas, Bellows & Liaw, 2011). However, the literature provides varying definitions of historical thinking. For Wineburg (1991), historical thinking is more of an exercise in explanation, rather than problem solving. Often, historians know certain outcomes – Christopher Columbus landed on an island in what is now call the Bahamas in 1492; English settlers establish a colony at Jamestown in 1607; the opening shots of the American Revolution were fired at Lexington and Concord, Massachusetts in April of 1775. In this sense, historians know certain facts, but must strive to explain the world through these facts (Wineburg, 1991). James and McVay (2009) define historical thinking as involving “critical thought about the past, asking good questions about sources of knowledge, about context and meaning of historical accounts” (pp. 347-348). In their study of preservice teachers, Salinas, Bellows and Liaw (2011) describe historical thinking as reflecting, synthesizing, and constructing understandings of history based on evidence. VanSledright and Limon (2006) divide historical knowledge and thinking into three categories: “first-order substantive knowledge” – which includes the products of historians’ inquiries, most often referred to as “content knowledge”; “second-order knowledge” – concepts including cause and effect and human agency; and “procedural knowledge” – the skills historians engage in to construct evidence-based interpretations of the past such as the ability to conceive of change as “continuity and change or change unfolding slowly over time. In a

later work, VanSledright argues that while memorization can serve a purpose to artificially stabilize a particular nation's narrative, historical thinking is better able to equip students to operate in a digital world in which multiples perspectives and narratives compete for attention (2009). For Seixas and Peck (2004), historical thinking includes four elements – significance, epistemology and evidence, continuity and change, and progress and decline. There is an agreement in the literature that primary sources can be historically contextualized best when one is able to connect historical events to historical themes (Haydn, Stephen, Arthur & Hunt, 2014). This is not possible if one views the concept of change through a lens of simple cause and effect, rather than continuity and change. Though definitions vary, the notion of asking critical questions and analyzing primary sources in hopes of giving meaning to the past resonates in nearly all explanations of historical thinking.

Though he does not use the phrase “historical thinking”, Bickford (2010) argues that the use of primary sources in the classroom promotes higher order thinking. Lindquist (1995) claims that not merely the presence of primary sources, but the examination of them promotes higher order thinking and can help students comprehend complex historical events. Tally and Goldenberg (2005) agree, stating that students must be emotionally and cognitively engaged while working with primary sources. For the purposes of this study, I will be focusing on Claire's cognitive use of historical contextualization, rather than on her implementation of emotion. This engagement can benefit students in numerous ways. For example, Tally and Goldenberg (2005) write that primary sources are comprised of multiple perspectives – many of which often contradict each other or themselves – which highlights the problematic nature of historical evidence.

Lastly, the practice of examining primary sources can help students develop “English, academic vocabulary and academic concepts in learning American history” (Fránquiz, M. E., & Salinas, C., 2013, p. 339). Moreover, if a preservice teacher is not knowledgeable about continuity and change as a concept, he or she may struggle to present historical content to students through such a lens.

**Analyzing Primary Sources.** Research suggests that there are several different methods of effectively analyzing primary sources. In his seminal 1991 work, Wineburg argues students should follow three heuristics when engaging primary sources. The first is corroboration, which can be stated as “Whenever possible, check important details against each other before accepting them as plausible or likely” (p. 77). Corroboration is vital because it accounts for bias. In his study of the differences in how historians and high school seniors analyze primary sources, Wineburg (1991) found that historians did not ask “Is the source biased?” but “How does a source’s bias influence the quality of its report?” This contrasts with the students who were more likely to see bias as simply being present in a source or not (p. 84).

The second heuristic outlined by Wineburg (1991) is sourcing, or the act of looking first to the source of the document before reading the body of the text. Not surprisingly, high school seniors viewed primary sources more simply than did the historians. The students saw primary sources as “vehicles for conveying information”, but historians viewed the texts “not as vehicles but as people, not as bits of information to be gathered but as social exchanges to be understood (p. 83). With this, sourcing can be seen less as a part of a protocol to follow, but as the “manifestation of a belief system in which texts are defined by their authors” (p. 83).

The third heuristic is contextualization, or the “act of situating a document in a concrete temporal and spatial context” (p. 77). This heuristic essentially answers the “when” and “where” questions by asking readers to place events in a chronological sequence and in a physical place, while determining the conditions of their occurrence (p. 84). The difficulty in employing these three heuristics may be why Wineburg (1991) found that expert students can be expected to find primary sources most useful, while novices tend to rely on textbook information or historians accounts.

Though he frames it slightly differently, VanSledright (2004) offers a similar protocol to help students assess primary sources. His includes four steps: (1) Identification – a determination of what kind of source or artifact is being analyzed. This helps in creating questions that can be asked about the source; (2) Attribution – a determination of who the author is and consideration for the context in which the source was created; (3) Judging perspective – an attempt to determine the author’s purpose for creating the source; (4) Reliability assessment – this involves corroborating evidence and information. Students should pursue additional sources to compare with the primary source.

Tally and Goldenberg (2005) outline what students out to do when engaging with primary sources so as to enrich their understanding of content:

- Closely observe the documents’ features
- Bring prior knowledge to bear
- Speculate about causes and consequences
- Make personal connections
- Use evidence to support their speculations

Others, like Oromond (2011), focus on how a teacher should instructionally approach student use of primary sources. She prefers a specific three-step approach that emphasizes scaffolding group size, in which a student individually analyzes a source, then pairs with a partner to analyze the source and finally works in groups of four to analyze the source. Regardless of the which protocol one follows, there is little disagreement that teacher expertise plays a vital role in helping engage students in the analysis of primary sources. Because of their limited experience, preservice teachers often lack the skills to be able to help students effectively analyze primary sources.

**Contextualization.** Though teaching historical reasoning skills can be difficult, teachers struggle to teach historical contextualization (Wineburg, Martin & Monte-Sano, 2012). Historical contextualization can be defined as the ability to situate a historical phenomenon or person in a temporal, spatial, and social context to describe, explain, compare, or evaluate it (van Drie & van Boxtel, 2008). Helping students learn to contextualize the past is difficult for a number of reasons. Chief among these is that contextualization contrasts with the narratives and frameworks that many students bring to class. As Reisman and Wineburg (2008) argue, “Not only have many students internalized timeless, psychologized notions of why people behaved as they did in the past, but they have also absorbed powerful stories through popular culture (p. 204). These long-standing historical frameworks can be difficult to alter , and teachers who do not give students multiple opportunities to practice and apply their new knowledge and skills may find that their students struggle to use historical contextualization in class.

Teachers who are successful in teaching historical contextualization often have expert levels of subject content knowledge, activate students to acquire knowledge, and

help students apply this knowledge to gain different historical reasoning competencies (Haydn, Stephen, Arthur & Hunt, 2014). Huijgen, Grift, Boxtel and Holthuis (2016) highlight four teaching strategies for promoting historical contextualization: reconstructing historical context, fostering historical empathy, performing historical contextualization, and raising awareness of present-oriented perspectives. First, the historical context of a phenomenon must be reconstructed to perform historical contextualization. Reisman and Wineburg (2008) argue that background knowledge is key for the performance of historical contextualization. Additionally, the literature seems in agreement about the importance of presenting the past through the lens of continuity and change, rather than simple cause and effect. In a simple cause and effect relationship, change occurs suddenly, while viewing historical content through the lens of continuity and change allows for change to be subtle and occurring throughout time. This often allows one to connect historical episodes to historical themes.

Huijgen, Grift, Boxtel and Holthuis (2016)'s validated protocol for historically contextualizing primary sources has four categories. The first centers on setting the focus of the historical context. The second emphasizes fostering historical perspective taking. The third focuses explaining historical contextualization. And the fourth centers on raising awareness of present-oriented perspectives. categories, I was able to generate themes related to my research questions.

Perhaps no facet of history education has inspired as much controversy as the concept of empathy (Barton & Levstik, 2004). Despite this, most historians agree that fostering historical empathy can promote historical contextualization (Endacott & Brooks, 2013). Historical empathy can be described as the process of students' "cognitive and

affective engagement with historical figures to better understand and contextualize their lived experiences, decisions, or actions” (Endacott & Brooks, 2013, p. 41). Because the concept of historical empathy is often thought of in both cognitive and affective terms, for the sake of simplicity I will be using the term “historical perspective taking” to refer to the cognitive aspect of historical empathy throughout this study. Historical perspective taking is a way to encourage the learner to think more deeply about the time in which the historical figure lived. Therefore, it is important for a teacher to use sources that would help students begin to understand the actions of a historical figure. One way to cultivate understanding of historical context is to place students in the position of a historical figure, confront the student with a question that the historical figure faced relative to his or her, and have the student in the role of the historical figure seek to find ways to answer the question by exploring relevant sources.

**Primary Sources and Preservice Teachers.** Preservice teachers have long struggled in trying to teach historical inquiry skills through the use of primary sources (Mayer, 2006). According to Grant (2003), the primary sources that preservice teachers use in the classroom are heavily influenced by a combination of their personal knowledge and beliefs, professional experiences, personal history and narrative and subject matter knowledge. This is not to say that experienced and veteran social studies teachers are not influenced by these categories. The difference seems to rest in that preservice teachers struggle to identify these biases. Specifically, though they are adept at identifying bias in a particular primary source, preservice teachers are less adept at isolating their personal ideological perspective (Lee, 2006). Without confronting their own ideology, it is difficult to discern how this would influence their pedagogy. Wineburg (2001) argues that when preservice

teachers assess their own preconceptions of historical topics, “preservice teachers gain deeper understanding of how to proceed with appropriate lessons” (p. 152). Furthermore, it is essential for preservice teachers to assess their students preconceptions of history content because, “Learning is not merely an encounter with new information, for new information is often no match for deeply held beliefs” (Wineburg, 2001, p. 153).

Research has shown that how preservice teachers use primary sources in the classroom contrasts sharply with how they should utilize them. When tasked with finding primary sources to use in their classrooms, preservice teachers most often choose what Doppen and Tessar (2008) refer to as “founding documents”. These documents include the Declaration of Independence, the U.S. Constitution, the Bill of Rights, the Emancipation Proclamation, and the Civil Rights Act. This relates to Resiman and Wineburg’ (2008) notion that students have internalized timeless beliefs as to why historical figures acted in the ways in which they did. When teachers rely solely on the “founding documents”, teachers present commonly accepted narratives. The second most common category of primary sources that preservice teachers use in the classroom are historical speeches. These included speeches by Abraham Lincoln, Robert E. Lee, Franklin D. Roosevelt, John F. Kennedy, and Martin Luther King Jr. (Doppen & Tessar, 2008). Furthermore, preservice teachers often discount long primary sources, regardless of their content or potential for developing their students’ historical thinking skills (Salinas, C. et al., 2011).

Because teaching with primary sources is challenging, scholars like Neumann (2010) provides an instructional approach for preservice teachers to use when teaching with primary sources. Instead of choosing documents solely based on length, or allowing one’s personal ideology to significantly influence the way in which a preservice teacher

determines how to use primary sources, Neumann's (2012) six-step approach for preservice teachers includes: (1) *Conceptual framework* – Discuss with students the subjective and interpretative nature of primary sources. Emphasize that interpreting primary sources is an imaginative “reconstruction” of information from the past; (2) *Selection of documents* – Preservice teachers should choose documents that strategically support essential questions in the content area and documents that contrast in their perspective on a given topic; (3) *Guided understanding* - Preservice teachers should model reading large portions of a document out loud, implanting what is called a “think-a-loud” strategy; (4) *Pre-reading* – Preservice teachers should ask students to brainstorm information they know about the author, era or general topic of investigation; (5) *Critical reading* – Once having read through the entire document, students should look for “sequence (through enumerative words), logical argumentation (arguments, appeals to reason, etc.), tone (including evocative or emotional words), and/or evidence of a relationship between the author and audience; and (6) *Summary* – Students return to their original hypothesis about the meaning of the text and to compare it with any new understandings (Neumann, 2010).

While none of these steps explicitly mentions contextualization heuristic, several of these steps lends themselves towards historical contextualization. For example, the “pre-reading” step could include background reading about the historical figure or situation that the primary source is focused on. This would provide some historical context for the students. Likewise, the “critical reading” step could connect reasons that the author of the primary source utilized a certain tone to the historical background that the students learned in the previous step.

Preservice teachers are also encouraged to differentiate primary sources. Wineburg and Martin (2009) argue that preservice teachers should adapt primary sources for struggling readers. These researchers suggest three main principles to guide a preservice teacher's adaptations of primary sources. They are: (1) *Focusing* – the use of sagacious excerpting of long documents; (2) *Simplification* – the selective modification of complicated syntax and vocabulary; and (3) *Presentation* – enlarge font and maximize the white space on the page.

Third, students should be able to explain the past based on their historical context knowledge (Wineburg, 2001). In order for this to happen, teachers should create opportunities for students to practice historical reasoning competencies. One of the most important of these is the notion of continuity and change, which presents change as slow, unfolding, and often non-observable (Lee and Cercadillo, 2013).

Lastly, teachers should help students become aware of their present-oriented bias and the potential consequences of this bias (Barton and Levstik, 2004; Huijgen et al. 2014; Wineburg 2001). According to Huijgen et al. (2004) students' presentism is one of the most significant reasons why students are unable to historically contextualize. Overall, the literature shows that teaching students to be able to historically contextualize primary sources is one of the most difficult, yet most rewarding endeavors of history teachers, making it the focus of my study.

### **Teacher Knowledge**

The ability of a preservice teacher to help students learn to use historical contextualization is influenced by a great number of variables. One of those variables is teacher knowledge. Unfortunately, there exists a lack of attention paid to how teachers

situate their thinking within the context of their practice (Clarà, 2015). Often, preservice teachers lack the knowledge of subject matter, students and pedagogy that experienced teachers have gleaned throughout time. This lack of knowledge can hinder efforts to teach students to use historical contextualization. Mena-Marcos et al., (2013) argue that because this type of professional teacher knowledge can best be acquired through deliberate reflection about practice, it is important that preservice teachers engage in reflective thinking skills. However, some preservice teachers may be reluctant to reflect because this reflection is centered on a knowledge base of teaching that they may not have (Bieda, Sela & Chazan, 2014).

This knowledge base was first outlined by Shulman (1987) in “Knowledge and Teaching: Foundations of the New Reform”, who argued that there were at least seven categories that underlie the teacher understanding needed to promote student learning. They are as follows:

- General pedagogical knowledge, with special reference to those broad principles and strategies of classroom management and organization that appear to transcend subject matter
- Knowledge of learners and their characteristics
- Knowledge of educational contexts, ranging from workings of the group or classroom, the governance and finance of school districts, to the character of communities and cultures
- Knowledge of educational ends, purposes, and values, and their philosophical and historical grounds
- Content knowledge, including knowledge of the subject and its organizing structures

- Curriculum knowledge, with particular grasp of the materials and programs that serve as “tools of the trade” for teachers

Shulman (1987) viewed pedagogical content knowledge as a combination of several categories of learners, referring to it as “that special amalgam of content and pedagogy that is uniquely the province of teachers, their own special form of professional understanding” (p. 8). Shulman referred to the last three categories – content knowledge, curricular knowledge and pedagogical content knowledge – as the missing paradigm in research on teaching (p. 8).

Shulman argued that the category of content knowledge should include knowledge of the curricular subject – as in U.S. history, biology, etc. – and its organizing structures. Furthermore, he stated that knowing a subject for teaching requires more than knowing its facts and concepts. Teachers should be fluent in the organizing principles for what is deemed legitimate within that field. As Shulman stated, “The teacher need not only understand what something is so; the teacher must further understand why it is so” (p. 9).

The second category, curricular knowledge, is vast. It encompasses the range of programs designed for teaching particular subjects at a given level, the variety of instructional materials available, and the set of characteristics that serve as the guidelines for the use of particular materials in particular circumstances (Shulman, 1986). It also includes the Common Core Standards and all areas affected by state and local boards of education including state standards, local programs of study and the adoption of textbooks. Additionally, Shulman explicated two other categories within curriculum knowledge, known as lateral curriculum knowledge and vertical curriculum knowledge. Lateral knowledge relates knowledge of the curriculum being taught to the curriculum that

students are learning in other classes. Whereas vertical knowledge connects content that has been taught in the same subject in previous years (p. 10).

The last, and arguably most influential, of the three content-related categories was the new concept of pedagogical content knowledge (PCK). Shulman (1986) defined this as: “The most useful forms of representation of those ideas, the most powerful analogies, illustrations, examples, explanations and demonstrations – in a word, the most useful ways of representing and formulating the subject that make it comprehensible to others” (p. 9). This is the knowledge that teachers use to translate a specific topic to students, while acknowledging students’ schema related to the topic. By presenting PCK, Shulman (1986) was attempting to fill in the artificial gap between content and pedagogy.

Despite its popularity, Shulman’s conceptualization of PCK has been criticized for a number of reasons. The first major criticism is that it lacks a theoretical and empirical backing to qualify it as a distinct form of teacher knowledge (Ball, Thames, & Phelps, 2008). A second criticism is that Shulman’s view of PCK is too static because it focuses on factual knowledge about teaching (Mason, 2008). Some researchers favor a more dynamic version of PCK, one that focuses on teachers knowing how to act in a particular moment or context (Hodgen, 2011; Petrou & Goulding, 2011). Notwithstanding these criticisms, Shulman’s conceptualization of PCK continues to influence research on teaching and teacher education.

Much attention has been paid to Shulman’s category titled “Knowledge of learners and their characteristics”. He argued that representations of a particular subject are informed by content-specific knowledge of student conceptions and misconceptions. A focus on these acknowledges that accounting for how students comprehend a topic is a key

feature of the work of teaching that content (Ball et al., 2008). Teachers transform the subject matter so as to make it understandable by students. In turn, teachers need to remain sensitive to how students interact with this content and then need respond accordingly. Additionally, Levin, Hammer & Coffey (2009) argue that when more attention is paid to the particulars of student thinking as they are tied to the content of instruction, preservice teachers can develop a student-centered frame to inform their instructional decision-making. Sun & van Es (2015) claim that learning to focus on student thinking can provide opportunities to develop practices for examining student ideas, including reflection-based activities. Though there has been much emphasis on student thinking throughout the last decade, Grossman (1990) explained how these ideas are integral to Dewey's notion of teachers "psychologizing" their subject matter:

Teachers must learn to 'psychologize' their subject matter for teaching, to rethink disciplinary topics to make them more accessible to students...Teachers must draw upon both their knowledge of subject matter to select appropriate topics and their knowledge of students' prior knowledge and conceptions to formulate appropriate and provocative representations of the content to be learned (p. 8).

Shulman (1987) also outlined four sources of teacher knowledge. These were (1) scholarship in content disciplines; (2) materials and settings of the education process (such as curricula, textbooks, school organizations and finance, and the structure of the teaching profession); (3) research on schooling, social organizations, human learning, teaching and development and the other social and cultural phenomena that impact what teachers do; and (4) wisdom of practice itself.

The most salient contribution of Shulman was to reorient the study of teacher knowledge in a way that focused on the role of content in teaching. This was a fundamental shift from prior research, which centered on general aspects of teaching and treated subject matter content as secondary to the role of teaching. In reframing the study of teacher knowledge to focus on content, he supported the notion that teaching is professional work with its own unique professional knowledge base. Furthermore, despite some critics claiming that Shulman's (1987) notion of pedagogical content knowledge was too static, Shulman argued that it was in fact active and constantly reinventing itself through simultaneous interactions within and between bodies of knowledge and through reflection.

**Other Influences on Preservice Teacher Knowledge and Reflection.** Lortie (1975) found that the thousands of hours in classes that preservice teachers have spent in school throughout their lives greatly influences their beliefs about what teachers should do. This concept of "apprenticeship of observation" was expanded on by Boyd, Gorham, Justice & Anderson (2013). When preservice teachers walk into a classroom for their teacher education training placement, many have strong perceptions of teaching and teachers, thereby holding deeply entrenched beliefs about the nature of academic content and pedagogy (Boyd et al., 2013). Engaging in reflective activities that ask preservice teachers to begin to question and challenge their own assumptions, may help them to gain new perspective onto the teaching profession.

**Pedagogical Content Knowledge and History.** Monte-Sano (2011) argues that pedagogical content knowledge in history education can be broken down into the following four categories: representing history, transforming history, attending to students' ideas

about history, and framing history. The first category, represent history, focuses on ways in which teachers communicate to students the nature of historical knowledge. Teachers must be comfortable in and aware of how they communicate historical ways of thinking and the structure of history as a discipline. A majority of the decisions that a history teacher will make inside his or her classroom from the selection of materials used to the organization of content and activities are examples of how a teacher represents history. During her teaching placement, Claire taught a lesson that was focused on the interpretive nature of history. In this lesson, she read aloud statements made by President Lincoln but did not tell the class that they were statements by the President. By purposefully not providing historical context, Claire showed how different individuals can interpret history in vastly contrasting ways.

The second category, transforming history, is focused on how a teacher can transform historical content into materials, lessons and units that target the development of students' historical understanding and thinking (Monte-Sano & Cochran, 2009). For example, a teacher might model and guide the overall process of writing as well as particular skills associated with writing history. While helping students analyze primary sources, Claire engaged in a "think-aloud" activity in which she helped students see how she would analyze sources of historical evidence.

The third category, attending to students' ideas about history, is centered on the teacher having an understanding about the knowledge or experiences related to historical content. Attending to student thinking requires teachers to not only be aware of students' thinking but to use it to help further their understanding of history. Students' conceptualizations of history can include the ways in which they understand the very

nature of historical knowledge. For example, do students view as simply “the past”, a set a “facts” or do they believe that history is an interpretative process in which “something is done, that is constructed, rather than an inert body of data” (Davidson & Lytle, 2004, p. xviii). Claire’s lesson about the interpretive nature of history highlighted this category by reading statements made by President Lincoln to the class that – without context – that sounded racist. She purposefully did not tell her students that they were made by Lincoln until the end, allowing Claire to disrupt her students’ simplified views of the past.

The fourth category, framing history, emphasizes teachers arranging topics within history to communicate cause and affect relationships between events and people. Harris & Bain (2011) argue that by doing this, the history teacher is organizing the history curriculum to demonstrate significance, connections and interrelationships. Claire’s choice to use certain primary sources to help students understand the themes of Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s was an example of her framing history for her students. Furthermore, the degree to which she decided to connect these themes framed the time period for her students.

The essential quality of reflection is thinking about practice in order to improve (Hatton & Smith, 1995). Though there are common elements found in most frameworks of reflection in teacher education including that reflection is a) situated in practice; b) cyclical in nature; and c) makes use of multiple perspectives, disagreements still exist about what constitutes a true reflective process. Much is demanded of preservice teachers, including demonstrating a capacity for considering students’ thinking. In addition to issues of classroom management, preservice history teachers should be asking themselves the following questions: What theories do students have about what makes something

historically significant? What conceptions and misconceptions do students have about the topic that is currently being discussed? How has my time spent in history classrooms impacted the way in which I am currently teaching? How should I design lessons that account for all of these questions? Though many researchers and teacher educators would quibble about what the process would look like, most would agree that some form of reflection would be beneficial. By systematically examining one's assumptions, student assumptions and practice in the classroom with a teacher mentor, preservice teachers will increase their chance of maximizing student learning.

### **Reflection**

The focus of this study was to analyze a preservice teacher's ability to historically contextualize subject matter in an 8<sup>th</sup> grade U.S. history classroom. One window of insight into how Claire thought about her use of such contextualization was through written and verbal reflection. Proponents of reflection (Callens & Elen, 2011; Hickson, 2011; Nelson & Sadler, 2013; Williams & Grundoff, 2011) believe that consciously assessing our own behavior allows us to make informed decisions. Wineburg (2001) argues that when preservice teachers engage in reflection they are better able to proceed with appropriate lessons. This constant assessment of behavior relative to bodies of knowledge helps teachers develop pedagogical content knowledge. When we examine our current situation in contrast with previous experiences, we are able to take an active role in shaping our professional growth (Binks, Smith, D.L., Smith, L.J., & Joshi, 2009). In this sense, reflective thinking can be empowering.

Integral to Claire's use of historical contextualization was her pedagogical content knowledge. Though she had relatively little experience in the classroom working with

students and historical content, her use of reflection was important to her formation of pedagogical content knowledge. Shulman (1987) refers to teaching as “comprehension and reasoning, transformation and reflection” (p. 4). Through written and verbal reflection Claire increased her chances of further developing her pedagogical content knowledge.

Much of the effort to conceptualize and operationalize the notion of reflection within the context of teacher education can be traced to Dewey (1933) who interpreted reflection as an explicit form of thinking that frees us from routine and impetuous activity. He felt that reflection had the ability to focus our actions with the use of foresight, thereby enabling us “to know what we are about when we act” (p. 17). Teachers who are aware of their internal understanding of history as an interpretive process of analyzing evidence can help engage students in constructivist historical activities.

Throughout this study, Claire engaged in both written and verbal reflection. Ghaye and Ghaye (1998) support the use of verbal reflection, because it allows the preservice teacher to contextualize the situation in which he or she is reflecting. Additionally, it provides the preservice teacher with an opportunity to make sense of his or her own thoughts. These researchers believe that conversation is crucial to the improvement process. Therefore, data collection for this study will include interviews that will help shed light onto the ways in which Claire thought about historical contextualization. Additionally, Cooner & Tochtermann, (2004) claim that written reflection can be utilized in teacher reflection as a strategy to connect theory to practice, while helping to facilitate plans for growth. Because of this, Claire filled out written reflection questions after she taught particular lessons.

It is worth noting that even if preservice teachers are honest in their reflections, they may not be accurate. Mena-Marcos et al. (2013) claim that preservice teachers have mostly “imprecise analytical observations about their practice, and these are predominantly interpreted as positive evaluations of what they have done” (p. 158). To safeguard against this, data was collected through observations of Claire teaching in real-time and through video recordings.

### **Summary**

The process by which a preservice teacher begins to use primary sources in his or her classroom is greatly impacted by Shulman’s constructivist conception of pedagogical content knowledge (1987). Though the preservice teacher may have little knowledge of curriculum or students, these all create a framework for teaching that influences his or her use of primary sources. This will impact to what extent he or she uses a protocol similar to those put forth by Wineburg (1991) and VanSledright (2004). Lastly, it is generally agreed upon that if a preservice teacher makes an effort to engage in a reflective process, his or her teaching will improve. Though the focus of this study was not Claire’s ability to reflect, I analyzed her reflections as a way to explore her thinking regarding the process of historically contextualizing primary sources.

The next chapter outlines the methodology used during this study, beginning by restating the researching questions. Then, I will describe the qualitative research design, setting, participants, and data collection process. Finally, I summarize the process by which data was collected, coded, and analyzed to discern what, if any, themes, emerged.

## Chapter Three: Methodology

### Qualitative Methods and Research Questions

For the purpose of studying a preservice teacher's thinking about her use of primary sources in an 8<sup>th</sup> grade U.S history classroom, this study was organized through a qualitative case study design. Those who engage in qualitative research aim to document in detail the conduct of everyday events and to identify the meanings that those events have for those who participate in them and for those who witness them (Erickson, 2012). For the purposes of this study, I documented the meaning that Claire—a preservice teacher working in my classroom—gave to the “everyday events” in the classroom that informed her thinking about historical context of primary sources. Qualitative research is necessary when the nature of research questions requires exploration (Stake, 1995). According to Patton (2002) qualitative research questions often begin with *how*. This enables the researcher to gain a careful understanding of phenomenon occurring relative to a particular case. This study explored Claire's conceptions of how to best historically contextualize primary sources by asking the following *how* questions:

- (1) How does a preservice teacher historically contextualize primary sources for herself and for her 8<sup>th</sup> grade U.S. history students?
  
- (2) What does her pedagogical use of primary sources with her 8th grade U.S. history students reveal about how she historically contextualizes such sources?

A qualitative study allows the researchers to explore phenomena, such as thought processes, that can be difficult to study using only conventional research methods (Strauss

& Corbin, 1998). This study investigated Claire's perceptions about how to historically contextualize primary sources in the classroom. Additionally, qualitative research methods are ideal when studying phenomena in their natural settings (Denzin & Lincoln, 2000). The "everyday events" that impacted Claire's use of primary sources occurred in the natural setting of an 8<sup>th</sup> grade U.S. history classroom. Lastly, qualitative research methods can accentuate the researcher's role as an active participant in the study (Creswell, 2005).

### **Case Study Approach**

Qualitative case study methodology provides tools for researchers to study complex phenomena within their contexts (Baxter, 2008). Analyzing this context through multiple lenses and data sources can deepen the researcher's understanding of the phenomena.

Both Stake (1995) and Yin (2003) base their approach to case study on a constructivist paradigm (Baxter, 2008). Constructivists hold the notion that truth is relative and dependent on one's perspective. This paradigm "recognizes the importance of the subjective human creation of meaning, but doesn't reject outright some notion of objectivity. Pluralism, not relativism, is stressed with focus on the circular dynamic tension of subject and object" (Crabtree & Miller, 1999, p. 10). In this sense, Claire's efforts to historically contextualize primary sources was an ongoing meaning-making process which necessitated collecting evidence throughout parts of this process.

Case studies can provide a holistic snapshot of such an issue in all its complexity, with the goal of helping the reader to develop "vicarious experience" (Stake, 1995). The snapshot taken in this case is one of Claire's use of primary sources in an 8<sup>th</sup> grade U.S. history class throughout ten lessons. The case study approach, with its "intensive, holistic description and analysis of a single instance, phenomenon, or social unit" (Merriam, 2001,

p. 27), can be effective in describing the many influences on what occurs in classrooms—student abilities, teacher practices and educational policies—and the changing values and priorities associated with them.

Furthermore, a case study approach can support the deep investigation into the unique attributes of an individual case and help communicate those attributes through thick description and well-crafted story (Merriam, 2001; Stake, 1995, 2005). Because this study was bound by the limitations of one preservice teacher working within the confines of a U.S. history classroom during the course of one semester, a case study approach worked best.

Case studies favor the collection of data in natural settings by emphasizing the study of a phenomenon within its real-world context (Yin, 2012). The natural setting for this case study was an 8<sup>th</sup> grade U.S. history classroom. The following is not a series of steps, but rather a list of possible actions taken by Claire while teaching primary sources that helped elicit evidence about her thinking of historical context:

- Determined how to historically contextualize primary sources
- Decided how to best use primary sources to convey history topics and to develop historical thinking skills
- Observed student interactions and activities, written, and oral feedback relative to the primary sources
- Reflected on those observations, feedback, and discussions between her and I to better inform her teaching
- Completed surveys designed to elicit her thinking before, during, and after her use of primary sources

- Engaged in oral interviews and follow-up questions with her Clinical Supervisor

How Claire historically contextualized primary sources underwent changes as she thought about the source in historical context, as she planned the content to go with the sources, as she operationalized a historical context for each source, and as she reflected on the context and her use of each source. This was an iterative process, rather than a linear one.

As Yin (2012) notes, “a ‘case’ is generally a bounded entity (a person, organization, behavioral condition, event or other social phenomenon), but the boundary between the case and its contextual conditions—in both spatial and temporal dimensions—may be blurred” (p. 6). This is germane to this study because at times Claire fluctuated over the boundary between “student” and “teacher”. Eventually, students looked to her as an authority figure—a teacher—though she was very much still a “student” teacher who was constantly engaging in teaching activities for the first time and seeking assistance from her clinical supervisor.

To bound the case, Claire graded the homework that she assigned her students. Because of this, students looked to her as an authority figure—one who could influence their grades to great deal. Students’ involvement in extracurricular activities is often dependent on them receiving certain grades in their classes. And though many teachers argue that “teachers don’t ‘give’ grades; students ‘earn’ their grades”, students certainly looked to Claire as an influential authority figure. They viewed her as a “teacher”, rather than a “student teacher”. While she often felt very much like full-time teacher because of this, she was simultaneously developing lesson plans, attempting learning activities, working with 8<sup>th</sup> grade U.S. history content for the first time, all while being evaluated by her University Supervisor. In this respect, she may have felt more like a “student” teacher,

rather than a full-time teacher. This process of synthesizing various groups of knowledge of students, content, and pedagogy is at the heart of constructivism and what Shulman (1986) referred to as pedagogical content knowledge.

This case study is a single holistic study because rather than studying multiple preservice teachers in multiple schools, it focused on analyzing a single preservice teacher in my classroom. Furthermore, I studied a bounded case in its totality, rather than studying specific units, processes, or projects within a single embedded case. Lastly, this study also fits the definition of a “descriptive case study”, in which the goal is to describe an intervention or phenomenon and the real-life context in which it occurred (Yin, 2003).

### **Multiple Roles**

Constructivism is built upon the premise of a social construction of reality (Searle, 1995). One of the advantages of this approach is the close collaboration between the researcher and the participant, (Crabtree & Miller, 1999). It was through this paradigm that I approached my multiple roles with regard to studying Claire.

**Clinical Supervisor Role.** Throughout this study, I acted as Claire’s clinical supervisor. According to the student teaching handbook from her university, this means that I was responsible for providing frequent, honest, and constructive feedback to Claire; developing professional characteristics within her; and evaluating her growth throughout the semester. I valued my role as a Clinical Supervisor because this was one of the first in-depth opportunities for Claire to receive regular feedback and suggestions for lesson design, implementation, and classroom management before beginning her own teaching careers. In this respect, I was surely one of the most important people in her learning

process throughout her student teaching placement. I helped Claire to develop the skills necessary to become a successful full-time teacher.

**Clinical Supervisor Responsibilities.** Listed below in Table 2 are four categories of mentoring responsibilities that I upheld throughout this case study (School of Education, 2012).

Table 2

Category of Responsibility	Clinical Supervisor Responsibilities Towards the Preservice Teacher
Logistical	<ul style="list-style-type: none"> <li>• Orient the PST to the use of materials, machines and supplies within the school building</li> </ul>
Classroom	<ul style="list-style-type: none"> <li>• Discuss classroom protocols like handing in papers, grading procedures, and transitioning between activities</li> <li>• Discuss appropriate behaviors and mannerisms within the classroom</li> <li>• Discuss classroom rules</li> <li>• Let the PST know of interests/abilities of students</li> </ul>
Professionalism	<ul style="list-style-type: none"> <li>• Introduce PST to administrators, other teachers and staff</li> <li>• Model professional expertise and ethical behavior at all times</li> <li>• Allow PST to participate in faculty meetings, parent-teacher conferences and other pertinent school functions</li> </ul>
Curricular & Pedagogy	<ul style="list-style-type: none"> <li>• Inform PST about the overall objectives and goals of the classroom, school and school district</li> <li>• Be flexible with the PST so he/she can experiment and develop a personal style and strategies of his or her own</li> <li>• Provide frequent, honest, and constructive feedback</li> </ul>

Adhering to each of above responsibilities was crucial in helping to craft a context in which Claire was able to gain valuable experience and advance in her journey to become a full-time teacher.

**Clinical Supervisor Communication Responsibilities.** I was responsible for communicating consistently, honestly, and professionally with Claire during her student teaching placement. I was expected to engage in feedback conferences with her and

thoroughly discuss potential lesson plans. It was imperative that I made Claire aware of the overall plan and course of study for the duration of her student teaching placement. Timely feedback is helpful in all learning endeavors; therefore, I provided Claire with frequent feedback. If Claire experienced problems or if I noticed potential areas of improvement, I was expected to notify her immediately. Similarly, I needed to highlight Claire's many successes. In addition to suggesting potential improvements, these successes served as the building blocks of her learning process. Without this feedback, Claire may have run the risk of becoming confused and unsure about her quality of teaching.

As a Clinical Supervisor, I was also responsible for communicating with the University Supervisor. This title refers to the School of Education's representative who was responsible for supervising the teacher education candidate. The University Supervisor was both a facilitator and a teacher - conferencing, instructing, and evaluating (School of Education, 2012). Communication between the Clinical Supervisor and University Supervisor most often took place during one of several formal conferences. However, the first in-person communication occurred at the beginning of the semester, when the University Supervisor covered the University's expectations for Claire and myself during her sixteen-week placement. During each observation of the preservice teacher, the University Supervisor and I discussed Claire's successes and areas for improvement. The University Supervisor was my first point of contact within in the School of Education. If any issues or concerns had arisen between visits by the University Supervisor, I was expected to contact her immediately so that problems could be addressed as quickly as possible.

**Clinical Supervisor Evaluation Responsibilities.** As a Clinical Supervisor, I was responsible for submitting daily reviews, conference reports, formative assessments, a

summative assessment, and assigning a final grade. The daily reviews was the timeliest feedback that I provided Claire. I was encouraged to designate a few minutes each day to discuss the events of that day that might be pertinent to her growth, including lesson plans, classes, and student issues. Most often, these occurred during my second planning period each day. These discussions led to both Claire and I experiencing a rewarding teaching and learning experience.

The second form of evaluation that I was responsible for were conference reports. Three times during the spring, Claire was required to conduct a formal conference with me and write a report reflecting the content of the discussion. Each conference lasted between 20-40 minutes. Often, she used her own questions or ones provided to her via the syllabus. The goal for these sessions was for Claire and I to sit down, uninterrupted, and discuss how her teaching was proceeding, including areas of strength, and potential areas for improvement. Following the meeting, the preservice teacher summarized the meeting in a conference report. A copy of this report, signed by me, was turned in to the Director of Student Teaching/Internships.

I was also required to complete and submit one formative evaluation for Claire halfway through the semester. A copy of this assessment can be found in Appendix A. It contains a total of 50 questions broken down into four categories including assessment, classroom management, implementation of instruction, and professionalism. It was my responsibility to rate my preservice teacher on the following Likert scale (see Table 3):

Table 3

<b>0</b> <b>Not observed</b>	<b>1</b> <b>Needs improvement</b>	<b>2</b> <b>Developing</b>	<b>3</b> <b>Skilled</b>	<b>4</b> <b>Exemplary</b>
Not observed during this observation	Not ready to assume responsibility for classroom	Currently developing expected beginning skills	Meets expected skills of a beginning teacher	Exceeds expected skills of a beginning teacher

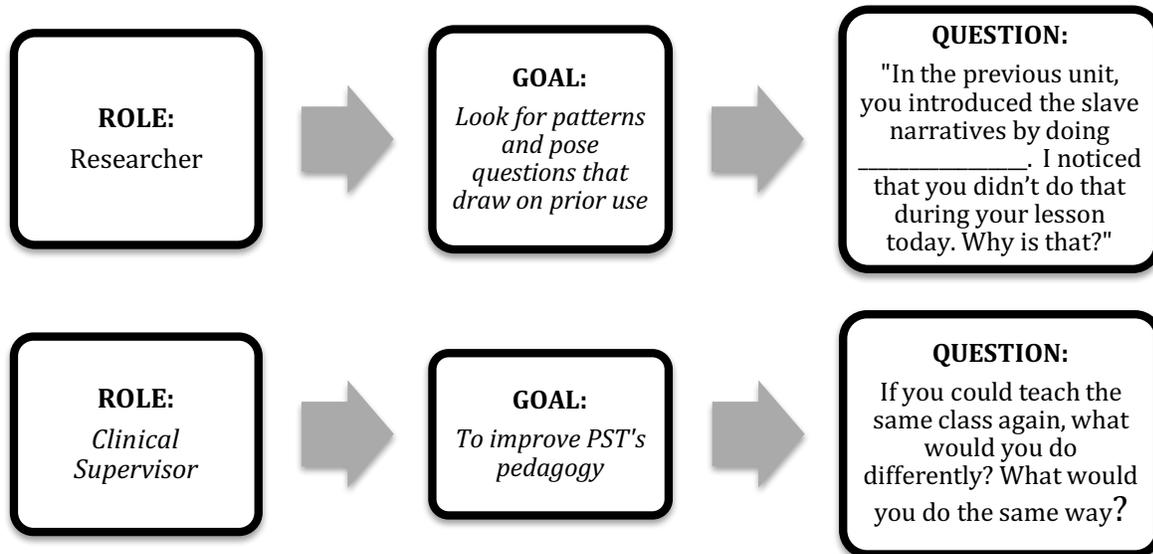
At the end of Claire’s student teaching placement, I submitted an online summative assessment form. This asked the same questions and had the same Likert scale as the formative assessment outlined above. The only difference is that at the end of the assessment I recommend a final grade for Claire. This final grade was the responsibility of the Director of Student Teaching/Internships in consultation with the Clinical Supervisor and University Supervisor. The Clinical Supervisor’s grade recommendation was weighted at 50% with the University Supervisor’s at 35%, and written assignments scores at 15% (School of Education, 2012). Claire’s final grade was not impacted by this study.

**Researcher Role.** My role as a researcher contrasted with my role as a Clinical Supervisor. As a researcher, I was responsible for collecting data and drawing inferences about Claire’s use of primary sources. Through this role, I had no vested interest in helping her improve her pedagogy. For example, as a Clinical Supervisor I was concerned with assessing Claire on four categories including assessment, classroom management, implementation of instruction, and professionalism. As a researcher, I was not focused on assessing. Rather, I attempted to gain insight into how she conceptualized her use of primary sources in an 8<sup>th</sup> grade U.S. history classroom. Claire was most impacted by this

role through her time spent answering reflection questions and engaging in interviews with me.

**Classroom Teacher Role.** There were many times throughout Claire's student teaching placement that I engaged in my role as an 8<sup>th</sup> grade U.S. history teacher. What distinguished those moments from the times I acted primarily a Clinical Supervisor was whom I am teaching. Certainly, there were many times in which I modeled teaching practices for Claire, but there were also times in which my target audience for instruction was not Claire; it was my 8<sup>th</sup> grade students. In those moments, I was not taking on the role of Clinical Supervisor or researcher, but classroom teacher.

**Distinguishing Roles.** As a research practitioner, I was responsible for conducting ethical research while maintaining my practitioner role as a Clinical Supervisor. For example, as a Clinical Supervisor I was charged with creating a learning environment and providing feedback that would help prepare Claire to be a full-time teacher. Questions that I asked of Claire from this role were from a mentoring perspective. However, as a researcher I attempted to gain insight into my Claire's thought processes. Therefore, I asked meta-cognitive questions, such as: "During the lesson today you decided to do \_\_\_\_\_. What were you observing and reflecting upon in that moment to persuade you to do \_\_\_\_\_?" Below, in table 4, are two examples of how I distinguished my dual-role and the sorts of questions that accompanied that role:



## Setting

This study was conducted in the spring of 2017 at a suburban middle school in a university town in the Midwest. For sixteen weeks, Claire, a preservice teacher who was a fourth year student in the School of Education at a Midwest State University taught in my 8<sup>th</sup> grade U.S. history classroom. During her student teaching placement, her units covered the time period between Indian removal (1830s) through the Civil War (1865), with the exception of an extension to the passage of the 19<sup>th</sup> Amendment (1920).

**Horace Green Middle School.** This middle school was one of four middle schools in a university town in the Midwest. It serviced a total of 742 children, grades 6<sup>th</sup> - 8<sup>th</sup>. It provided two sections of each core class—Social Studies, English Language Arts, Math, and Science—per grade level. Throughout the school there was an average of 23 students per class. Seventy-eight percent of the student population identified as White, seven percent identified as African-American, seven percent identified as Hispanic, five percent identified as Asian, and three percent identified with the category “other”.

**Classes.** Claire recorded herself teach, completed a written reflection, and a verbal interview in the context of two classes. She recorded herself teach with a primary source during second period and excused herself from the room and watched the recording of herself and filled out the written reflection (Appendix B) during third period. Her second period class was 43 minutes in length and had 25 students, including one student who was considered an English Language Learner (ELL) and who received specialized services. There were fifteen boys and ten girls.

**Participants.** During this study, Claire was a twenty-two year old preservice teacher in her final year in the School of Education in a Midwest State University. In the fall of 2016, she was placed in a small rural district in which she taught seventh and eighth grade social studies. She was prepared in her content and her plans for post-graduation from the teacher education program included securing a full-time social studies teaching position. Claire did attend Horace Green Middle as a student between 2006 and 2008, though I did not teach there during that time.

### **Data Collection**

**Participant Observation.** A hallmark of case study research is the use of multiple data sources, a strategy that also enhances data credibility (Yin, 2003). Data collection for this study included participant observation, video recordings, written reflections, and interviews. This method of data collection was chosen because it demanded first-hand involvement with the context that for the study. By engaging in this setting as a participant, I had unique ability to experience the reality that Claire experienced.

DeWalt and DeWalt (2002) believe that the goal of participant observation methodology “is to develop a holistic understanding of the phenomena under study that is

as objective and accurate as possible given the limitations of the method" (p.92). This study explored how Claire thought about her use of primary sources in the natural setting of an 8<sup>th</sup> grade U.S. history classroom.

In a participant observation methodology, the researcher is able to create richly detailed descriptions of behaviors, situations and events (DeMunck & Sobo, 1998). This type of detail will be necessary for me to recognize patterns and highlight themes related to Claire's use of primary sources.

**Video Recordings.** Data was collected from video footage of ten lessons, approximately 30 minutes in length, in which Claire used primary sources a focal point of the lesson. The first recorded lessons focused on Indian removal and was recorded in late January. The final recorded lesson took place in early April and focused on women's suffrage. On days that she taught with primary sources, I recorded her teaching during first period so that during third period, which was my plan time, she could leave the classroom and watch herself teach. As she watched this video she filled out the reflection protocol provided to her. The full protocol can be found in Appendix B. Upon having watched the video and answering the reflection protocol, she returned to class. She continued to teach the lesson—with any modifications she deemed appropriate—throughout the rest of the day. I also watched these video recordings and took notes on the protocol which can be found in Appendix C. This is an instrument proposed by Huijgen, Grift, Boxtel and Holthuis (2016). It has been modified to more appropriately fit the setting of this study.

**Observations.** While Claire taught with primary sources, I walked around the room observing and taking notes, focusing on Claire's introduction to the primary sources that she incorporated into her lesson. Additionally, the observations focused on how Claire

fostered historical perspective taking and how she created opportunities for students to explain their historical perspective taking.

**Written Reflections.** During third period when Claire watched the recording of herself teaching with primary sources, she also completed a written reflection. This protocol was comprised of four sections and can be found in Appendix B. The “before” or “anticipatory” section asked about the objectives in the lesson. The “during” or “contemporaneous” section asked about what students were doing during the lesson that gave Claire insight into their learning. The “after” or “retrospective” section was adapted from Oner and Adadan (2011). This section asked Claire to think about indicators during the lesson that showed if the learning objectives were met. The final section asked Claire to compare what she believed happened during the lesson to the feedback she received from her Clinical Supervisor. She filled this section out after the accompanying interview. Additionally, any teacher products such as materials that Claire gave to students that may have offered insight into her historical contextualization were collected.

**Interviews.** The purpose of the interviews was to provide me with an opportunity to pose questions to Claire so that she could provide more depth and detail regarding her thinking about using primary sources in the classroom. Merriam (2001) noted that interviews allow the researcher to respond to specific claims that the interviewee makes in the moment. I consistently interviewed Claire during our second planning period at the end of each of the ten days that I recorded her teaching with primary sources. Prior to those interviews I had read through her reflection responses to gain an understanding of her perspective on that day’s lesson. During those interviews, I asked her to expand on her written reflection. For example, if she wrote something on her written

reflection that indicated she was unsatisfied with how well our students understood the primary sources, I then asked if she thought that occurred because they did not understand the background of the primary source or the context in which the source was created. This semi-structured format worked well because it allowed to me plan out specific questions based off of Claire's written reflection prior to the interview, but also provided me the flexibility to focus on particular responses that Claire gave in the interview. There were several moments in which our perspectives on that day's lesson varied. Therefore, the interviews were crucial in highlighting these various perspectives, since "each interviewee is expected to have had unique experiences, special stories to tell" (Stake, 1995, p. 65).

Having multiple data sources helped enrich this study, by providing a thick qualitative description of Claire's historical contextualization of primary sources. By having four sources of data, I was able to check the consistency of my findings. Conversely, having multiple data sources helped to elucidate complementary and contrasting aspects of Claire's use of historical contextualization. For example, I observed Claire teach a lesson about the Homestead Act in which she did not mention the impact of slavery of individuals moving west. In her interview later that day, I asked her about this and mentioned that she did not write at all about slavery during her written reflection which she completed directly after the lesson. Data from the lesson observation helped me to note that she did not mention slavery; data from the written reflection made it clear that she was not questioning her omission of slavery immediately after the lesson; and data gathered during the interview allowed her voice to be heard relative to this issue. The continued triangulation of data sources and repeated process of planning, teaching, and reflecting

throughout this study helped to paint a holistic description of Claire’s historical contextualization of primary sources.

### **Data Analysis**

In order to best analyze my data, I used deductive coding on information gleaned from the following four sources: (1) observations; (2) Claire’s written responses to the reflection protocol, which she filled out based on her viewing the video recordings of herself teaching with primary sources; (3) Interviews conducted with Claire; and (4) the video recordings of Claire teaching.

Patton (2002) describes the process of deductive coding as the creation of analytic categories before the gathering of data “according to an existing framework” (p. 453). For this study, the sources of categories were derived from Huijgen, Grift, Boxtel and Holthuis (2016). This validated protocol has four categories. The first revolves around setting the focus of the historical context. The second focuses on fostering historical perspective taking. The third involves explaining historical contextualization. And the fourth emphasizes raising awareness of present-oriented perspectives. By comparing coded responses throughout Claire’s use of primary sources relative to these categories, I was able to generate themes related to my research questions. The chart below outlines these four categories:

<b>Set the Focus of the Historical Context</b>	<b>Foster Historical Perspective Taking</b>
<ul style="list-style-type: none"> <li>• Activates prior knowledge</li> <li>• Presents relevant characteristics about the time period</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Centralizes a historical actor</b></li> <li>• <b>Moves students into the past, allowing them to act from a perspective of a historical figure</b></li> </ul>

<p><b>Explain Historical Contextualization</b></p> <ul style="list-style-type: none"> <li>• Create opportunities for students to explain why they acted in the ways in which they did (“If I lived at the time...”)</li> </ul>	<p><b>Raise Awareness of Present-Oriented Perspectives</b></p> <ul style="list-style-type: none"> <li>• Compares phenomena with other times and perspectives (including the present)</li> </ul>
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### **Assumptions**

The following assumptions were made regarding this study:

- The preservice teacher had a basic understanding of what constitutes a primary source, but given research on pedagogical content knowledge, it was assumed she lacked knowledge and skill with regard to making effective curricular and pedagogical decisions about their use in an 8<sup>th</sup> grade U.S. history classroom.
- The preservice teacher would use primary sources in her instruction as it is a part of the 8<sup>th</sup> grade U.S. history curriculum
- The preservice teacher would complete the reflection protocol on a timely basis.
- The reflection protocol would reliably highlight the PST’s thinking about her use of primary sources.

### **Limitations**

Based on the nature of the study, several limitations were identified. Generalization of the findings is limited as the data came from a single case study focused on one preservice teacher. The report of findings may not represent how PSTs use primary sources with students of differing abilities, differing ages or in differing geographical areas. Also, the preservice teacher worked with a relatively small sample size of students, making this study difficult to generalize.

Additionally, this study was limited by Claire's ability to articulate what she was thinking as it relates to her teaching. Pedagogical content knowledge literature indicates that Claire most likely lacked knowledge related to curriculum and students, therefore demanding that I highlight certain curricular matters for her. Lastly, Claire only planned and taught several units of her own, which may have helped lead to her episodic presentation of history and made it difficult to approach the content from the perspective of continuity and change.

### **Trustworthiness**

To establish trustworthiness, I followed the credibility and transferability guidelines put forth by Lincoln & Guba (1985). They argue that credibility, or the confidence in the truth of the study's findings, can be enhanced by persistent observation. The purpose of persistent observation is to identify characteristics and elements in the case that's being studied that are most relevant (Lincoln & Guba, 1985). By observing Claire throughout her student teaching placement, while specifically focusing on the lessons in which she used primary sources, I established credibility because "persistent observation provides depth" (Lincoln & Guba, 1985, p. 304).

Similarly, I established trustworthiness in my case study by providing conformability, which is the degree of neutrality or the extent to which the findings of a study are shaped by the respondents and not researcher bias, motivation, or interest (Lincoln & Guba, 1985). One way to create this is to use multiple data sources. Known as triangulation, using multiple data sources can create an account that is rich, robust and well-developed (Lincoln & Guba, 1985). For this case study, I studied the ways in which Claire used primary sources in the classroom by collecting data from the following sources:

observations, interviews, and surveys. By having multiple sources of data, I was able to have a more thorough understanding of this case.

I ensured that Claire's voice would be heard by writing detailed descriptions of how Claire taught each of the ten primary sources within this study. In each detailed description, I provide examples of exchanges that she had with various students to highlight the ways in which she contextualized primary sources. Lastly, I also included excerpts of the interviews that she participated after each primary source she taught.

### **Summary**

In this single, qualitative case study rooted in the Shulman's (1987) pedagogical content knowledge framework, I explored Claire's thinking about how to use primary sources in an 8<sup>th</sup> grade U.S. history classroom. By utilizing observations, video recordings, and interviews I was able to gain insight into the meaning that Claire gave to events that transpired in the classroom that informed her thinking. In the following chapter I will present the research findings of my study. Such findings will be organized by themes and focused on my research questions.

## Chapter Four: Findings

### Introduction

Shulman (1987) referred to content knowledge, curricular knowledge and pedagogical content knowledge as the missing paradigm in research on teaching (p. 8). This study, designed to investigate how Claire contextualized primary sources, was framed within these three types of knowledge. Claire's pedagogical knowledge manifested through her use of lessons, units, and pedagogical supports and provided me insight into her content understanding. This content knowledge included her decision to focus on the themes of Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s – which are part of the district 8<sup>th</sup> grade U.S. history curriculum. It also informed her use of historical organizing concepts like cause and effect. Her curricular knowledge was grounded in the district curriculum and the organizational structure of the textbook. The textbook used periodization resulting in there being two separate chapters covering similar years (1840's-1860's), but different historical content. Claire taught the first chapter dealing with Westward Expansion and Manifest Destiny. The second chapter focused on sectionalism, slavery, and the Civil War.

So as to establish a curricular context for what Claire did, Chapter Four of this dissertation first discusses a content outline that she created and taught during a ten-week unit. The outline addresses two historical themes and related content – Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s. During the unit, Claire used primary sources on ten occasions to further her students' understanding of historical content related to the two themes. In creating the content outline, she consistently relied on the district curriculum and the course textbook to inform her

planning. I referenced the textbook and certain online sources to provide the description of the major events in her outline.

In answering the first research question, which asks *How does a preservice teacher historically contextualize primary sources for herself and for her 8<sup>th</sup> grade U.S. history students?* I first report on what Claire planned to do relative to contextualizing primary sources, which I learned through interviews and written reflections; then address what she taught, which I learned via observations; and finally, present how she reflected on what she taught, which I learned through interviews. Next, I present two major findings related to how Claire contextualized primary sources. First, Claire presented students with an episodic view of the past. She tended to teach primary sources through short-term contextualization despite showing knowledge of historical content that matched a long-term contextualization during her interviews. Second, she presented historical content to students through the lens of simple cause and effect, even though during interviews she explained her thinking about historical events within the context of continuity and change

Finally, in answering my second research question which asks *What does her pedagogical use of primary sources with her 8th grade U.S. history students reveal about how she historically contextualizes such sources?* I discuss what Claire's pedagogical use of primary sources revealed about how she historically contextualized them for herself and for her students. These pedagogical uses included activating students' prior knowledge, debriefing historical perspective taking activities, and connecting historical content to the present, her use of which indicate that Claire does not yet possess a deep and sophisticated pedagogical content knowledge.

### **Claire's Unit Plan**

Appendix D describes the historical content used in each lesson topic, how the content was drawn from curricular resources, and which of the two distinct themes – Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s – each lesson was connected to. In this sense, Appendix D serves two purposes. First, it illustrates what she planned to teach in each lesson. Second, it provides the curricular knowledge about the historical content that she planned to address. The majority of the lessons focus on historical content prior to the Civil War. Unlike many preservice teachers, Claire was not provided a strict sequence of lessons or units to teach, though I did suggest that she spend time teaching the two themes of Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s.

Claire tended to organize historical content through several frames. First, during her planning, she attempted to use sources and design lessons that would fit one of two themes in U.S. history – Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s. During the time period of the 1840s through the 1860s and within each theme, Claire most often organized her primary sources and lessons chronologically around significant events.

She tended to organize the content within each theme that defined the time period by significant events within the time period and theme that were not organized in a strict, linear order. Here are the content related events had she presented them in chronological order: the Missouri Compromise (1820), the Indian Removal Act (1830), Texas Independence (1836), the Trail of Tears (1838-1839), Texas annexation (1845), Seneca

Falls Convention (1848), “Bleeding Kansas” (1854-1861), and the Homestead Act (1862).

The chart below shows each primary source and its related event and theme:

Primary Sources and Related Lesson Topic & Theme

Days	Lesson Topic	Time Period Theme	Primary sources
2	Indian Removal Act (1830): This Act required Cherokee and others to exchange and leave their lands east of the Mississippi River for land west of the river.	Westward Expansion via Manifest Destiny	Transcript of President Jackson’s speech to Congress <i>On Indian Removal</i>
3, 4 & 5	Trail of Tears: A series of forced removals of Native American nations from their ancestral homelands in the Southeastern United States to an area west of the Mississippi River had been designated as Indian Territory.		General Winfield Scott’s speech (excerpts)
			Traveler’s Account of Trail of Tears to the <i>New York Observer</i> 1839
			Cherokee Messenger’s Written Account of Trail of Tears
9	Westward Expansion: During the 1800s many Americans moved west for economic opportunities.		John Gast’s <i>American Progress</i> painting
15 & 16	Homestead Act: This act made public lands in the West available to settlers without payment to be used as farms.		Homestead Act Poster
			Letter from a homesteader
18	Texas Independence: In 1836 Texas declared its independence from Mexico.		Texan Declaration of Independence
26	Declaration of Sentiments: A document signed by many at the Seneca Falls Convention in 1848 calling for equality of all men and women.		Age of Reform from 1820 to the 1860s
30	Women’s Suffrage Amendment: The 19 <sup>th</sup> Amendment established the legal right of	Age of Reform from 1820 to the 1860s	Pamphlet supporting a suffrage amendment from the National American Woman Suffrage Association

	women to vote in 1920.		
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### Explanation of Unit/Time Period Themes

**Westward Expansion via Manifest Destiny.** "Manifest Destiny" was the term used throughout the 1840s to describe Americans' belief that they were destined by God to spread their beliefs across the continent. Although the phrase did not originate until 1845, the concept was articulated by Benjamin Franklin in 1751 when he talked of "filling up new western lands" (Milner, 1994, p. 166). By the 1840s under Presidents Tyler and Polk, the territory of the United States dramatically increased through the annexation of Texas, the acquisition of Oregon, the military conquest of California and New Mexico, and the addition of Native American lands in the Great Lakes region as those tribes were relocated on the Great Plains. Manifest Destiny served as the philosophical underpinning for many Americans to justify these land acquisitions and resettlement in the west.

**Age of Reform from 1820 to the 1860s.** Reform movements proliferated throughout the United States in the nineteenth century. During the 1820s and 1830s white men achieved universal suffrage, while women, blacks, and Native Americans lacked access to the political process. To demonstrate their objection, these groups and their sympathizers organized reform movements to increase public awareness and to impact social and political policy. Some reformers were motivated by religious beliefs and spurred on by the Second Great Awakening. Reform movements in abolitionism, women's rights, public schools, temperance, and prisons were all successful in bringing about positive change. Together, the reform movements from the 1820s to the 1860s constitute the "Age of

Reform.” Though it is deeply connected to the “Age of Reform”, the suffrage movement can be best understood as an outgrowth of the women’s movement during this time period.

This is the only post Civil War reform movement Claire taught during this study.

### **Lesson Descriptions**

In the Content Organization section, I outlined what Claire planned. This was followed by an explanation of the themes that connected her lessons. Below are detailed lesson descriptions that came from in-class observations and video recorded observations.

**Cherokee Removal (Lessons 1-4):** Throughout the course of four days, Claire used four different primary sources to help students learn about the removal of the Cherokee from Georgia. On the first day, Claire used Andrew Jackson’s 1830 speech to Congress *On Indian Removal*. The next day, Claire taught General Winfield Scott’s *Address to the Cherokee Nation*. It is important to note that this speech occurred eight years after Jackson’s speech to Congress. Claire mentioned this very briefly to her students, but did not make a point of emphasizing it. On the third day, Claire used an account of a white “Native of Maine” who was traveling in the south and witnessed the carnage along the Trail of Tears. On the fourth day, Claire used a primary source that was a written account by John C. Burnett, who was a private in the United States army assisting the Cherokee on their forced relocation. In providing these four primary sources on four separate days, Claire attempted to provide her students with a range of perspectives on the Trail of Tears, one as presented in a speech to Congress, one directed at the Cherokee people, and two first-hand accounts of what occurred.

The day before teaching about Jackson’s *On Indian Removal* speech (lesson 1), Claire began class with a bellringer question asking, “What is a primary source?” After a

short discussion with her students, they agreed that a primary source is an “original document that was created during the time that we’re studying”. Additionally, during the same class period Claire introduced the term “Manifest Destiny” by using a short section from the textbook. She was reluctant to use the textbook because she felt that “Textbooks don’t provide the depth that other sources do.” Nonetheless, Claire used the textbook to explain to the class that the term Manifest destiny originated in the 1840s and that it referred to the belief that the United States was destined by God to spread freedom by expanding its boundaries all the way to the Pacific Ocean. She described the positive reputation that westward expansion had held for many years, but argued that it had a negative impact on Native Americans. In a lesson, several weeks later about the interpretive nature of history, she referenced this point. She continued by saying that some of these tribes, such as the Cherokee were forced from their homelands, particularly because of the Indian Removal Act of 1830. She explained that the following day students would analyze President Andrew Jackson’s speech to Congress titled, *On Indian Removal*. She described that it was not aimed at persuading Congress to pass the Indian Removal Act, but to justify its existence as it had already been passed earlier that year. She also provided background information about Andrew Jackson by discussing with students the Election of 1824, the “Corrupt Bargain”, the Election of 1828, the expansion of democracy to white men who did not own property, the spoils system, and the Tariff Debate. However, other than the term “Manifest Destiny”, Claire did not discuss any of these concepts on the day that she was teaching Jackson’s speech to Congress *On Indian Removal*.

***Jackson’s speech to Congress On Indian Removal (Lesson 1)***. After the opening bellringer, Claire proceeded to project a copy of Jackson’s speech to Congress on the white

board. As a full class, Claire and her students filled out the primary source analysis sheet (Appendix E). Immediately, Claire began to help her students source the document. Claire's consistent practice in sourcing documents with her students showed what Wineburg (1991) called a "manifestation of a belief system in which texts are defined by their authors" (p. 83). One of the questions on this sheet asks students to name the type of document that is being analyzed. She made a point that the document that they were all looking at may have been a transcript by projecting a copy of a handwritten version of the speech and asking, "If this handwritten speech is the original, what would our typed version be called?" There was also a question on the analysis sheet that asked, "For what audience was this document created?" The students immediately answered, "Congress", but Claire prompted them to think more deeply about these questions. Eventually, students answered that Congress was comprised exclusively of white men and that this was significant considering the issue up for debate was the removal of groups of non-white people. This was an example of Claire utilizing Wineburg's (1991) contextualization heuristic, or the "act of situating a document in a concrete temporal and spatial context" (p. 77). The document also asks for students to list points that might be important to the author. Answers included that the Cherokee would be paid for leaving their land and that Jackson referred to the Cherokee as "savages". Claire mentioned that from this document it was clear that Native Americans were seen as a "nuisance" to white Americans and that Native Americans were expected to convert to Christianity. However, Claire provided no long term examples of treatment of Native Americans during the Thirteen Colonies or in the first half century of the United State's existence. By omitting such descriptions of white superiority common throughout the continent during the previous century, Claire

presented Jackson's speech simply as a result of gold being discovered in the hills of Georgia, rather than a combination of the historical inferior treatment of Native Americans and economic motives by whites.

***General Winfield Scott's speech to the Cherokee Nation (Lesson 2)***. When teaching about General Winfield Scott's *Address to the Cherokee Nation* (lesson 2), Claire referenced the previous day's lesson in which students analyzed Andrew Jackson's speech to Congress. She used prompts such as, "Alright, why did Jackson make that speech to Congress?" She helped them recall that there was gold found in the hills Georgia and that white settlers were eager to move into to the state. After refocusing students on that day's primary source – *Scott's Address to the Cherokee Nation* – Claire helped provide short-term contextualization by mentioning that General Winfield Scott was a well-respected general and that if Jackson had chosen him to give this address, Jackson must have felt this issue was very important. Students noticed that General Scott refers to the troops as "friends" of the Native Americans. Claire responded by asking if the students felt he was being truthful or not. Most students felt that he was "lying" in hopes of convincing the Cherokee to relocate. Claire acknowledged their belief, but pointed out that many white people at the time believed that relocating the Cherokee was the only way to truly save them.

***Traveler's Account of the Trail of Tears (Lesson 3)***. The next primary source that Claire chose to use during her teaching of the Trail of Tears was an account of a traveler who referred to himself as a "Native of Maine" (lesson 3). This title is a bit misleading. Though he was indeed a native of Maine, he was traveling in the south and had a first-hand experience witnessing the tragedies along the Trail of Tears.

Claire once again contextualized the primary source by reminding her students of Manifest Destiny, Jackson's speech, and General Scott's address. She framed this lesson around the conditions that the Cherokee faced along the Trail of Tears. Before passing out the primary source, Claire asked, "What are some potential hardships that Native Americans might have endured along the Trail of Tears?" Students suggested disease, violence, and starvation. This worked nicely for Claire to set up this primary source. She added "bad weather" to the list by asking students, "How would the 'severe fall of rain' that the author mentions affect those traveling along the trail?" Claire also referenced General Scott's use of the term "friends" in his address by asking students if forcing the Cherokee into these harsh conditions – hunger, disease, and severe weather – was something that "friends" would do to each other. Her students emphatically shook their heads and Claire used this as an opportunity to emphasize the difference in perspective that some members of the U.S. government and the Cherokee had regarding this event.

*Cherokee Messenger's Account of the Trail of Tears (Lesson 4)*. Claire used an account from a Cherokee messenger to help students further understand the trauma that the Cherokee endured during relocation. This account from a Cherokee messenger impacted students more than any of the other primary sources on this topic. Students were agast at the conditions on the trail. Claire seized this opportunity to make connections with the other primary sources that she had used in previous lessons on the same topic. She connected this document to the Indian Removal Act by asking her students, "What legal act forced the Cherokee to face these terrible conditions?" Most students were able to recall the name of the Indian Removal Act. This corroboration of documents is helpful because it can highlight bias (Wineburg, 1991).

### **John Gast's *American Progress* painting and Interpretive Nature of History (Lessons 5):**

**John Gast's *American Progress* painting.** To continue teaching about the effects of Westward Expansion via Manifest Destiny, Claire decided to use a primary source unlike any other she had previously used in class. John Gast's *American Progress* painting shows these effects in an artistic portrayal of the entire United States. At first glance this lesson appeared to be a dramatic shift for Claire. Up until this point, she had selected primary sources based on their connection to a specific historical event, such using Jackson's speech to Congress to help teach students about the Indian Removal Act. Because the *American Progress* painting is not referencing a specific event, it appeared that Claire was selecting this primary source because of its connection to a historical theme. However, upon deeper investigation, it became clear that Claire chose to use the *American Progress* painting not because it related to a specific historical event or event a historical theme. The painting is simply so popular and well-known to those who study nineteenth century U.S. history that she nearly felt compelled to use it. Additionally, Claire also claimed to have selected this primary source because, "It was a piece of art, which was something that I hadn't used before in class. It was a different kind of primary source, not a speech or a letter."

Claire opened this lesson by giving her students with a bellringer that asked, "Up until this point, we've mostly worked with primary sources in class that are documents. What other kinds of primary sources exist?" This question immediately broadened her students' schema of what type of artifact could constitute a primary source. It also proved a smooth transition to the *American Progress* painting. Claire utilized Wineburg's (1991) sourcing heuristic by discussing Gast and that the painting first appeared in an 1872 series of western travel guides. Claire seemed focused on the industrialization aspect of the

painting and helped point out the Brooklyn Bridge in the background, explaining to students that “the bridge is on the top right hand side of the painting, but what direction would that be if this painting were a map of the United States?”

“East! Wait, northeast!” a student blurted out.

“Yes, the northeast,” Claire responded. “That’s because it represented the industrialized and cities of the northeast.” She also helped students notice that the left side of the painting was a darker shade than the right. Though it took a few minutes, student eventually started guessing that this represented what the painter might view as the “uncivilized” west. Claire spent more time discussing the technological advancements that were evidenced in the painting than on the social and cultural impact that Manifest Destiny had on Native Americans. When I asked her why she chose to divide her instructional time this way, she replied that, “Since I’ve talked about Manifest Destiny quite a few times already, I thought it would be more beneficial to focus on the industrialization aspect of the painting”. Clearly, Claire assumed that providing background knowledge to students several days before a lesson would suffice as appropriate historical contextualization.

On the second day, Claire explained that history was interpretive and described the difference between historical myths (“Everyone thought the world was flat except Christopher Columbus. He sailed the ocean blue in 1492 to prove that the Earth was round!”) and records backed up by historical evidence (“Columbus wanted to find a trade route around the world so that he and others could find gold and slaves”). Claire used this to compare two narratives surrounding Westward Expansion. First, Claire played a popular Schoolhouse Rock video called “Elbow Room” which argues that in the 1800s Americans just wanted more “elbow room” because they were too cramped on the East coast and that

there was plenty of available land west of the Mississippi. Second, Claire looked back at the ideology of Manifest Destiny with ethnocentric overtones that led to the Trail of Tears and other examples of persecution by non-Christian whites.

The *American Progress* lesson and this less are paired together because they both involve analyzing a historical narrative. Claire used Gast's painting to represent one narrative of Manifest Destiny. The lesson about the interpretive nature of history served as a follow up to this lesson as it more deeply explored how conflicting historical narratives can surround one historical event or movement.

***Homestead Act (Lessons 7-8):***

***Homestead Act poster.*** Claire opened her teaching about Homestead Act (lesson 7) with the statement that "one way that people could move west was with the help of the Homestead Act". She continued by asking, "What symbols are used in the poster?" Once students felt comfortable with this she posed several more in-depth sourcing questions including, "What does the creator hope the audience will do? What purpose is served by the poster?" Students quickly suggested that the purpose of the poster was to convince people to move out west. Claire also asked, "is this primary source reliable?"

"Yeah, I guess so," students said.

"It sounds like you're just assuming that it's reliable," Claire responded. Instead of continuing discussion on this point, Claire had a plan to bring this back up during the next day's lesson.

***Letter from a Homesteader (Lesson 8).*** Deciding that students would benefit from reading an account of someone who had taken advantage of the opportunity provided to him through the Homestead Act, Claire assigned her students to read a letter written by a

homesteader. She asked her students to list several of the hardships faced by this individual. Students focused on illness and grasshopper infestations. Claire encouraged her students to make a connection from this primary source letter to the Homestead Act by asking her students why the Homestead Act poster did not mention any of these potential difficulties about settling in the west. Students explained that “whoever made the poster wouldn’t want to tell anyone those things because then people might not want to move.”

“That’s interesting,” Claire said wryly, remembering yesterday’s discussion. “Are you implying that you don’t think the Homestead Act poster from yesterday was reliable?” For the next few minutes Claire helped students make connections between the Homestead Act and the letter from the homesteader.

### **Texas Declaration of Independence (Lesson 9):**

While teaching about the Texan Declaration of Independence primary source (lesson 9), Claire began the class by having her students define several important terms including tejanos, empresarios and the Battle of the Alamo and key figures such as Stephen F. Austin. Next, Claire explained why tension began to grow in Texas, stating, “that when Mexicans saw themselves being outnumbered. They halted immigration from the United States and taxed all goods coming from the U.S.” By helping students better understand the reasons that tension grew in Texas, she provided students with a deeper contextualization of the document. Claire led her students through several sourcing exercises in which they highlighted the authors and date that the document was created. Claire prompted her students with questions such as, “What complaints do the authors have about the government?” She also drew a connection between this document and the United States Declaration of Independence by asking her students, “What other document have you

studied that had a similar purpose? When some students struggled, she helped them by highlighting phrases such as “lives, liberty, and the property of the people.” She did a thorough job of “situating a historical phenomenon or person in a temporal, spatial, and social context” (van Boxtel and van Drie, 2012) relative to the complaints of settlers in Texas. However, Claire did not mention that the revolution which led to Mexico’s independence was the result of the constant spread of American expansionist beliefs throughout the continent, nor did she mention Manifest Destiny, the justification for such beliefs.

#### **Seneca Falls Convention and Suffrage Amendment (Lessons 10-11):**

*Excerpts of Declaration of Sentiments (Lesson 10).* “We hold these truths to be self-evident; that all men and women are created equal; that they are endowed by their Creator with certain inalienable rights; that among these are life, liberty, and the pursuit of happiness”. This was the line that Claire used to open her lesson about the Seneca Falls Convention in which her students studied the Declaration of Sentiments. “Does this sound familiar?” asked Claire.

“Isn’t it from the Declaration of Independence?” a few students asked.

“Yes,” Claire replied. “But, there’s one change... ‘and women’ was added. That’s why this is sometimes called the ‘women’s Declaration of Independence.’”

Interestingly, Claire did not reference the theme of Age of Reform during this lesson. She did provide some background information for why this document was created. She explained that the Seneca Falls Convention was organized by Lucretia Mott and Elizabeth Cady Stanton and that they were both abolitionists who felt that if slaves could gain more rights that women should as well. Suffrage, she explained, was the most controversial part

of the convention. Though she had mentioned it many times before, Claire quickly asked, “Do we remember what suffrage is? What does that word mean?” Many students answered, “voting”, so Claire moved on, and discussed some of the rights that those who signed the Declaration of Sentiments desired. Though she was not consistent in doing so, this is an example of Claire having activated students’ prior knowledge, which can help students apply new knowledge to gain different historical reasoning competencies (Haydn, Stephen, Arthur & Hunt, 2015).

***National Woman Suffrage Association pamphlet (Lesson 11)***. Claire conducted a lesson on the efforts to secure women’s suffrage. To do this, she chose to use a Pamphlet supporting a suffrage amendment from the National American Woman Suffrage Association. To build historical context for her students, she asked students to brainstorm examples of rights that women lacked in the late nineteenth century and early twentieth centuries. They listed many of the rights that Claire had discussed with them during her lesson focusing on the Declaration of Sentiments. These included that women were often not allowed to keep their own money – they had to give it to their husbands, women could not choose to divorce their husbands, and that women were unable to vote. Claire helped answer questions as students filled out the primary source worksheet, including one about the process of amending the Constitution.

### **Contextualizing Primary Sources**

While contextualizing historical content, two patterns emerged in how Claire historically contextualized primary sources. First, Claire tended to teach primary sources through short-term contextualization in which she provided information directly related to a specific event or matters related to that event. This episodic approach to viewing the past

matches the way in which students often think about history. They think about “what happened” in terms of particular events, often ignoring long-term historical trends (Barton & Levstik, 2004). This contrasted with how she contextualized historical content during her interviews. In those, she typically provided context related to two subsets of long-term contextualization: Westward Expansion via Manifest Destiny and the Age of Reform; and to broader thematic connections in U.S. history such as the treatment of Native Americans by the whites. Her ability to change between various levels of contextualization in her interviews was impressive. Kosso (2009) noted that “Individual events and actions are understood by being situated in the larger context. However, the larger context is understood by being built of individual events. It is a hermeneutic circle and perhaps the only way to understand other people” (p. 24). Therefore, each level of contextualization is influenced by and impacts other types of contextualization.

Second, during her teaching she often presented historical content through the lens of simple cause and effect, even though during interviews she explained her thinking about historical events within the context of continuity and change

**Short-Term v. Long-Term Contextualization.** Consistently throughout Claire’s teaching, she taught historical content through short-term contextualization which can be defined as contextualization of the past primarily in terms of things that happened suddenly which caused change, rather than slow, unfolding, and non-observable change (Lee and Cercadillo, 2013). Specifically, she often provided information directly related to a specific event or matters related to that event. However, when interviewed, Claire described her knowledge of historical content in ways that matched a long-term contextualization. This type of contextualization distinguishes itself from short-term

contextualization by its emphasis on connecting historical developments, events, and people to enduring themes in history. For the purposes of this study, two subsets of long-term contextualization were used. The first is time period context, which is related to either Westward Expansion via Manifest Destiny or the Age of Reform. The second subset is a larger thematic connection to the broad themes of interaction between whites and non-whites, slavery, and the fight for equality. Notwithstanding a few lessons in which she provided a long-term contextualization for her students as illustrated in the examples that follow, while teaching Claire consistently provided short-term contextualization, but omitted long-term contextualization throughout her teaching placement. Claire contextualized all the primary sources that she presented to her students; however, she did not contextualize all of these with the same depth. This highlights the notion that contextualization can operate on many different levels.

Claire's usage of Andrew Jackson's speech to Congress *On Indian Removal* (lesson 1) was the first lesson that the discrepancy between short-term and long-term contextualization became evident. She thoroughly outlined appropriate short-term context by describing how many white settlers believed that there was gold in Georgia lands that were occupied by the Cherokee and that this led to Jackson's speech to Congress about relocating the Cherokee Indians. She also explained that Jackson gave the speech to Congress to justify the removal policy already established earlier that year by the Indian Removal Act.

While this short-term context is accurate and important, this contextualization of Jackson's speech did not convey the time period context of the Indian Removal Act's connection to Manifest Destiny. It also did not contextualize the Indian Removal Act within

the larger thematic context of the long-term trend of white superiority in the United States – and in the Thirteen Colonies prior to that. During an interview, Claire described her understanding of Jackson’s speech that was quite different than how she contextualized it for her students. In her interview, she explained that Jackson’s speech was:

All part of Manifest Destiny. Jackson wanted settlers to be able to move westward and set up settlements partially because it would help him get re-elected, but also because he probably believed that Native Americans were uncivilized and inferior to whites. The U.S. government had a pattern of doing this from the beginning.

This description clearly could be termed “long-term contextualization” because it considers the actions of the federal government dating back to the founding of the country. It perfectly encapsulates all three levels of historical contextualization. Claire provides short-term context, connects the Indian Removal Act to Westward Expansion via Manifest Destiny, and links it to the larger trend of conflict between whites and Native Americans. Despite this, when contextualizing Jackson’s 1830 speech to Congress for her students, she only provided a short-term context, missing the opportunity to focus her instruction on the relationship between historical factual details (short-term context) and large historical developments (Hallden, 1997). Claire’s quote shows that she is developing her ability to contextualize historical content on many different levels. Her lack of experience in the classroom possibly prevented her from conveying her understanding to students.

When Claire presented students with a Traveler’s Account of the Trail of Tears (lesson 3) and a Cherokee Messenger’s Written Account of the Trail of Tears (lesson 4) her discrepancy between short-term and long-term contextualization once again emerged. In an interview, she demonstrated her broad and deep contextualization of the Trail of Tears.

Claire stated that Trail of Tears was a “major event in the destruction of Native American culture” and that it was “marred by devastation, the sheer length of the journey, the great unknown that the journey held in terms of climate, growing conditions, and the potential presence of other tribes”. She went on to say that the event was one of many examples of poor treatment of Native Americans by the United States government. Claire’s description of “climate, growing conditions, and potential presence of other tribes” is evidence of short-term contextualization. Her insistence that the Trail of Tears was one “of many” examples of poor treatment of Native Americans by the U.S. government shows that she also viewed relocation of Native Americans through a larger thematic lens. Claire sought hard to show the personal impact that the Trail of Tears had on the Cherokee. By using two primary sources of first-hand accounts she persuasively conveyed the trials and tribulations of the Cherokee during this time.

Again, the discrepancy between how Claire contextualized this event for herself and her students became clear. When Claire engaged students in a perspective taking activity in which students wrote letters as if they were traveling along the Trail of Tears, she provided them with short-term context in the form of two primary sources that described the devastation, but offered no long-term historical context to situate the event. The first primary source used was an account by a traveler who signed himself, “A Native of Maine” and was published in the New York Observer in 1839. In this source, the speaker said that the “aged Indians were suffering extremely from the fatigue of the journey, and ill health” and went so far as to say that “they buried 14 or 15 at every stopping place”. The second source that Claire provided was an account by a Cherokee messenger who stated that “The trail of the exiles was a trail of death” and that he had known “as many as twenty-two of

them to die in one night of pneumonia do to ill treatment, cold, and exposure.” By choosing these documents, Claire successfully conveyed the suffering that occurred along the Trail of Tears. Students’ eyes widened in horror as they read these accounts. But, there was no larger thematic contextualization of this event among the other examples of how Native Americans had been treated since the arrival of Europeans in North America two centuries earlier. Claire also presented the Trail of Tears as something that was done to the Cherokee rather than providing them with historical agency. She did not discuss efforts by the Cherokee people to try and remain where they lived within the eight years between the Indian Removal Act and the Trail of Tears, such as the adoption of a written language and their role in the U.S. Supreme Court case, *Cherokee Nation v. Georgia*.

There are countless examples of which Claire could have chosen, dating back to Columbus’s inhuman treatment of Native Americans, European colonists inadvertently – and at times advertently – exposing Native Americans to smallpox, and the Northwest Ordinance of 1787 which resulted in many tribes losing their land. These are just a few of the numerous examples of unethical treatment of Native Americans by the U.S. government. By selecting several of these and discussing them with her students, Claire could have provided her students with a deep and long-term contextualization for the Trail of Tears, connecting it to the enduring historical theme of Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s. Additionally, this could have given her students a richer background to reference as they wrote journal entries.

Claire’s tendency to present historical events episodically rather than an example of a historical trend continued with several of her later lessons. For example, when Claire taught about John Gast’s 1872 painting, she focused on short-term context, pointing out

that the painting first appeared in an 1872 series of western travel guides. Though it was smart to include this bit of information, students might have viewed this painting as a unique and singular historical event rather than a useful window into the larger theme of Manifest Destiny of the early 19<sup>th</sup> century, particularly given how the painting implicitly was presented as representing westward expansion at the time.

While analyzing the Declaration of Sentiments, Claire did a thorough job of discussing the Seneca Falls Convention. She went so far as to have students engage in an activity in which they learned about the disparate goals of five distinct group of women who attended the convention. This was interesting because it marked the first time that Claire provided short-term context and a larger thematic context but omitted any connections to the time period. By discussing the Seneca Falls Convention, Claire provided short-term context for when, where, why, and how the document was created. She also presented a larger thematic contextualization of the document by engaging students in an activity in which they would learn about the experiences of various groups of women and their differing stances on the issue of women's rights. Although she did mention that suffragists and abolitionists often had shared interests, she was not explicit in contextualizing the Declaration of Sentiments within any of the other reform lessons she had taught including the Temperance movement, abolitionism, education reform, and prison reform that constituted the "Age of Reform". Therefore, Claire did not connect the Declaration of Sentiments to the time period known as the "Age of Reform" (Appleby, 2009). She provided a lower-level context (short-term context) and higher-level context (larger thematic context), but did not describe a middle-level context (time period-context).

Ironically, a week later Claire discussed the 19<sup>th</sup> Amendment with her students and provided a long-term contextualization for it by highlighting that it was the “culmination of the hard work during the Age of Reform when suffragists worked together to write the Declaration of Sentiments”. Additionally, in her discussion of the Declaration of Sentiments, she briefly referred to the United States Declaration of Independence. This was an excellent reference, but did not fully tease out this comparison. It does not fulfill Wineburg’s (1991) corroboration heuristic. This is an example of the difference between acknowledging historical relationships and historically contextualizing that relationship

Lastly, Claire provided excellent short-term contextualization of Texan Declaration of Independence primary source, but did not offer much long-term contextualization. Prior to showing students the Declaration of Independence of the People of Texas primary source, she helped students define key terms such as tejanos, empresarios and the Battle of the Alamo and key figures such as Stephen F. Austin. This was time well spent as one way to help students contextualize primary sources is to pre-teach unfamiliar vocabulary (Nokes, 2011). Additionally, Claire explained why tension began to grow in Texas, which provided a more thorough short-term context for the Declaration of Texas Independence. Earlier, Claire referenced a similar line in the United States Declaration of Independence, but did not compare the contexts in which both were created or as Wineburg (1991) suggested, “Check important details against each other before accepting them as plausible or likely” (p. 77). She acknowledged a historical relationship between the two, but did not historically contextualize that relationship.

However, by not mentioning Manifest Destiny and President Polk’s desire to annex Texas, Claire presented Texas independence and annexation episodically. This omission of

time period context prevented students from understanding Texas independence as another example of Westward Expansion via Manifest Destiny. The revolution which led to Mexico's independence was the result of the constant spread of American expansionist ideals throughout the continent. Undoubtedly, Texas annexation was a crucial component to the United States' continental expansion. It is difficult to convey the enthusiasm among Americans' belief in the Manifest Destiny ideology as they settled in the new state. One early visitor proudly proclaimed, "Texas is not a place, it is a commotion!" (Lamar, 2014, xi). Texas annexation would dramatically impact the rest of the country in the next hundred years. Much of its history is related to larger continental events such as the California gold rush and the cattle drive. Later, Texas would become one of the Dust Bowl states that contributed to the massive flow of farm migrants to California during the Great Depression of the 1930s. This unfolding of events can be traced to a steadfast belief in Manifest Destiny and Texas annexation which promised the literal expansion of freedom and hegemony throughout west during the nineteenth century. Claire did not discuss the impact that Manifest Destiny's influence on Texas independence had on the rest of the country in years to come.

The issue of slavery in Texas highlights the disconnect between the two themes of Westward Expansion via Manifest Destiny and Age of Reform. For example, there was real concern that the South might split Texas into several slave states in order to increase slavery states' influence in the Senate. Annexation of Texas was pivotal to the continued spread of slavery, yet was occurring at a time when the abolitionist movement was gaining mainstream popularity. The issue of slavery is representative of what Claire could have discussed with her students to paint a thicker context of Texas independence. Wineburg

and Fournier (1994) claimed that historical contextualization is the process of building a context of circumstances that surround a particular phenomenon to render it more intelligible. Devoid of the context of slavery, it impossible to fully understand Texas independence. Mexico had outlawed slavery, but land – especially in east Texas – was fertile to grow cotton. Aware of this, many white settlers wanted to challenge Mexico’s ban on slavery and found the idea of independence attractive.

In her two lessons directly preceding her Texas independence lesson, Claire taught about the Homestead Act (lesson 6), but did not mention slavery. Much of the land that Americans were allowed to settle was part of the Northwest Territory, which had banned slavery. When teaching about Texas independence and the Homestead Act, Claire avoided the most important issue of the day – slavery – because she wanted to wait and include such discussions in a separate unit that the textbook refers to as, “Slavery and the Road to the Civil War”. In fact, the only time in which she discussed slavery was during her lesson about abolitionism during the Age of Reform unit. In order for teachers to identify enduring themes in history, they must teach students to appreciate the particular circumstances that shape a given movement in time (Reisman & Wineburg, 2008). Clair understood that the abolitionist movement in the nineteenth century was important. However, without an understanding of the circumstance in Texas as it related to slavery, it is difficult to grasp the full significance of the challenge that abolitionists were facing in the years leading up to the Civil War.

One of the advantages of using a history textbook is that its authors have already demarcated time periods (Romanowski, 1996). This gives history teachers guidance and an organizational structure. However, there are instances in which multiple themes run

through a single time period. Claire encountered this dilemma when she was faced with teaching the two seemingly diametrically opposed themes of Westward Expansion via Manifest Destiny and the Age of Reform. Though she was aware of the individual pieces, that Texas independence was related to Manifest Destiny, that the Homestead Act was connected to Manifest Destiny, and that abolitionism was an essential movement in the Age of Reform period, Claire's lack of sophistication prevented her from synthesizing these themes and events for her students.

**Continuity & Change v. Cause & Effect.** Another lens to view Claire's oscillation between short-term and long-term contextualization is through the historical themes of continuity and change and simple cause and effect. Throughout her teaching, she continued to switch from thinking of what occurred in the context of continuity and change, to a focus on simple cause and effect while teaching her 8<sup>th</sup> grade students. This episodic view of the past actually serves to decontextualize the historical event by taking the event out of the larger context of what was occurring during a particular time period. This view is one that assumes that change occurs at once. In reality, "Change is not clear cut and to that degree requires a level of understanding which is quite sophisticated and not easily achieved by many pupils" (Haydn, Arthur, and Hunt, 2014, p. 152). For this study, Westward Expansion via Manifest Destiny and Age of Reform are what unites what occurred during the time period in the early to mid-1800s. Claire focused on events, as opposed to themes that bind years into time periods. This lends itself to contextualizing the events through the lens of simple cause and effect relationships. Conversely, a focus on historical themes better lends itself to thinking through a lens of continuity and change.

For example, when Claire taught about Andrew Jackson's 1830 speech to Congress about Indian removal, she presented this as an effect caused by white settlers' desires for gold in Georgia. While this causal relationship can be supported with historical evidence, it is somewhat misleading. By solely focusing on this, students are not given the opportunity to view Indian removal as part of the trend of white superiority and Manifest Destiny that characterized America in the years leading up to Jackson's presidency. During her interview, Claire showed that she contextualized Indian removal as part of a continuous trend in early America. However, she presented this historical material as an example of simple cause and effect. Ironically, in her attempts to contextualize Jackson's speech she actually decontextualized it by taking it out of the long-term context of what had been occurring throughout North America since European settlers arrived in Jamestown.

Historians view Declaration of Sentiments as a continuation of the expansion of rights guaranteed to Americans since the founding of the country: "By tying the complaints of women to the most distinguished political statement the nation had made she [Stanton] implied that the women's demands were no more or less radical than the American Revolution had been; that they were in fact an implicit fulfillment of the commitments already made" (Kerber, 1976). This is an example of long-term contextualization. Claire personally contextualized the Declaration of Sentiments as an event woven into the trend of Americans attempting to gain rights they believed were inherently granted to them by the U.S. Constitution. In her interview she stated that, "Women had been trying to secure the same rights as men since the beginning of the country and this is one of those examples." When prompted as to why she believed that women felt they were owed those rights, Claire replied that "the Constitution

guaranteed those rights". However, when she contextualized it for students she presented it as an example of simple cause and effect. The cause was that women wanted more rights and the effect was that they gathered – with some men – at the Seneca Falls convention and signed the Declaration of Sentiments. This causal presentation strips the primary source of its long-term contextualization.

Claire's contextualization of the Texan Declaration of Independence primary source (lesson 8) also followed this pattern. When she introduced the topic, she did a wonderful job of presenting short-term contextualization, but she presented the event as a result of simple cause and effect. The cause was that Americans settling in Texas did not meet the requirements set forth by Mexico which were to convert to Catholicism, learn Spanish, become Mexican citizens and follow Mexican law. The effect of Americans' refusal to abide by these four requirements lead them to fight for their independence. While this can be supported with historical evidence, this simple cause and effect relationship falls short of fully contextualizing the event and time period. The continuous theme of increased westward expansion, white superiority, and Manifest Destiny was woven into the fabric of American life in the 1800s. By not connecting this continuous arc, Claire unintentionally decontextualized Texas independence.

**Claire's Organizational Structure.** To reconstruct historical context, teachers can use different frames of reference, such as the chronological frame of reference, the spatial frame of reference, or the social frame of reference (van Boxtel & van Drie, 2012). The social frame focuses on the social conditions of life of individuals and groups. Claire, in her teaching of primary sources in an 8<sup>th</sup> grade classroom used a social frame of reference, as she organized historical content around the treatment of various groups of people. The

column on the left of Appendix D uses the titles that Claire used with her students. These titles were often used by the textbook. For example, the term “movement” is used by the textbook in several ways. The first is the physical movement of people, including the Trail of Tears, Mormons, the Oregon Trail, and the cattle drive. The second is related to a social movement or an association of people to move an idea forward. Examples of these social movements include prison reform, temperance, women’s rights, and abolitionism. Claire did not articulate the difference in these two meanings of the word “movement” for either her students or for me. The column on the right is a descriptive summary of the topic itself, rather than a summary of what Claire actually taught in the classroom on that given day. The purpose of the chart is to give context to the reader so he or she can gain a background knowledge for the historical content that Claire chose to teach during this ten week study. This context will help the reader more fully understand the analysis provided later in this chapter.

It is important to note that Claire organized historical content around the treatment of various groups of people. She seemed most cognizant of this when asked about how she dedicated four full class periods to cover the Trail of Tears. Much of which was focused on the experiences of the Cherokee on the trail, rather than on the political or economic effects of the Indian Removal Act. Though she continued to organize historical content through the treatment of other groups, this organizational structure became more internalized and at times, Claire was surprised to see that she was continuing this pattern. For example, she seemed less aware that her decision to teach about the Oregon Trail through the journey of the Mormon people, fit this organizational structure. Or that during her teaching of the Homestead Act poster and letter from a homesteader primary sources

(lessons 6 and 7), she did not ask her students to read the Act itself or to think about the economic implications of such an act. Rather, Claire focused on how it could open possibilities for various groups of people to take advantage of cheap land. Even her teaching of the Declaration of Sentiments and the suffrage amendment pamphlet primary sources (lessons 9 and 10) focused on the hardships that specific groups of women – New England mill workers, enslaved African Americans, Cherokee, middle- and upper-class whites, and women in the newly conquered territory of New Mexico – endured during the nineteenth century. Claire's adherence to showing students the perspectives and experiences of various groups of people also explains why she utilized excerpts from *A Young People's History of the United States* (2007) from acclaimed social and cultural historian Howard Zinn that highlights the views, voices, and stories of non-elites.

Finally, Claire seemed more comfortable with the content in the Westward Expansion via Manifest Destiny theme than the Age of Reform theme. This is most likely because much of the content that fell within the Westward Expansion via Manifest Destiny theme could easily be tied to specific historical events. For example, President Jackson's speech was obviously tied to the Indian Removal Act. From interviews with Claire, it is clear that she did not purposefully use a thematic approach during the Age of Reform, but because she lacked specific knowledge of events she felt compelled to focus on social movements including abolitionism, education reform, prison reform, women's rights movement, and the women's suffrage movement.

Regarding her episodic view of history, it is difficult to know how much of her episodic view of history was caused by how she chose primary sources that were directly connected to a specific historical event. Which came first, her awareness of certain sources,

which typically were tied to an event, or her learning about an event and then seeking relevant primary sources? Most likely, this was an iterative process for Claire. For example, Claire was unaware of some of the primary sources that she used during this study, but aware of the historical events that they were related too. A good example of this was the Texas Declaration of Independence. Though Claire was aware of Texas's Independence from Mexico, she was unaware of the specific document calling for independence. Conversely, Claire seemed aware of the Declaration of Sentiments document, but was only vaguely familiar with the Seneca Falls Convention.

Overall, Claire tended to provide short context for the primary sources she used during her lessons. She also presented historical content through the lens of simple cause and effect. Over the course of the ten-week study, Claire consistently performed several pedagogical habits. The next section discusses those habits.

### **Pedagogical Supports for Contextualization**

In her attempt to historically contextualize primary sources for her students, Claire consistently – yet unknowingly – fell into three pedagogical habits. First, she assumed that providing background knowledge to students several days before teaching with primary sources would suffice as appropriate historical contextualization. Given this assumption, she often failed to activate students' prior knowledge. Second, she rarely helped students debrief the process or substance of perspective taking activities so as to better enable her students to appropriately contextualize a historical figure. Third, she did not present students with opportunities to connect historical content to the present. These three pedagogical patterns constrained Claire's ability to historically contextualize primary sources.

**Activating Students' Prior Knowledge.** Claire often provided background knowledge to students several days before teaching with a primary source, believing that students would not only be able to *remember* the information, but to use it to *contextualize* the primary source being discussed. Unfortunately, students consistently struggled to recall much of this information. For example, several days prior to teaching about Andrew Jackson's 1830 speech to Congress "On Indian Removal", Claire had explained that though the term "Manifest Destiny" originated in the 1840s, the belief that it was Anglo-Saxon Americans' divine right to expand their civilization and institutions across the breadth of North America had existed long before this time. While this background information is accurate and valuable, Claire missed an opportunity to revisit it when she taught with Jackson's speech to Congress *On Indian Removal* (lesson 1). Another example of a missed opportunity to connect a primary source to background information that Claire taught earlier in the week involves Jackson's reputation as a common man. Several days before Claire taught Jackson's speech to Congress, she discussed with her students that Jackson, in part, was elected because of his appeal to non-elites. However, when discussing his speech to Congress with her students, Claire did not mention that many of the white settlers who wanted to move into Cherokee land were the non-elites that voted for him in 1828. Lastly, when teaching about General Winfield Scott's *Address to the Cherokee Nation*, Claire could have compared that address to Jackson's speech "On Indian Removal" Congress. Potential discussion questions could have included, "What was the goal and purpose of each of these speeches? What context had changed including the condition and treatment of the Cherokee Indians that would have impacted how they felt about each speech?"

Claire later had students write a journal entry as if they were on the Trail of Tears in which she assumed she did not have to help connect students' prior learning to their assignment. She simply said, "Think about the primary sources you read on Friday". Rather than posing this blanket suggestion, she could have prompted students to recall what forces led to such terrible treatment of Native Americans. Furthermore, she could have asked students to discuss the similarities and differences between the primary source anecdotes from the day before that were focused on the Trail of Tears. The account in the New York Observer and the account by the Cherokee Messenger were sources that if referenced properly by Claire could have provided students with a deeper context of the Trail of Tears, allowing them to write richer journal entries.

Another example of how Claire assumed that what she taught nearly a week prior would suffice for appropriate background knowledge and historical contextualization was when she used John Gast's *American Progress* painting primary source (lesson 5). In her interview, she specifically stated that she wanted to use this painting as part of a summative lesson because she "thought the students would already know the Manifest Destiny context that would be needed to understand it". While she is correct that one must understand Manifest Destiny to fully contextualize the *American Progress* painting, she did not fully help students make that connection. For example, connections between the painting and Manifest Destiny could include how Gast depicts Native Americans as migratory but Americans as sedentary, the book in the arm of the woman representing knowledge and schooling and suggests that Native Americans are ignorant, and that American animals are domesticated while the Native Americans are "wild". She did make a concerted effort to help students analyze the painting by pointing out the Brooklyn Bridge

in the background and connecting it and the power lines to the idea of industrialization. After this she discussed the importance of light in the painting, emphasizing that the east was light and the west looked dark. This would have been an opportunity to prompt students about the role that Manifest Destiny played in western expansion and its relation to the notion of progress. Because Claire contextualized the *American Progress* painting in this way for herself, this lesson is another example of the disconnect between how she contextualizes historical content for herself and how she contextualizes it for her students.

While teaching with the Homestead Act poster primary source (lesson 6), Claire seemed to focus her energy on sourcing the document with students rather than contextualizing it. She began her lesson by showing students a Homestead Act Poster and asking simple questions such as “What are the main colors used in the poster? What symbols are used in the poster? Are the messages in the poster primarily visual, verbal, or both?” Once students felt comfortable with this she posed several more in-depth sourcing questions including, “What does the creator hope the audience will do? What purpose is served by the poster? Is this primary source reliable?” These are all important sourcing questions to ask, but Claire missed an opportunity to connect this poster to the content she had taught in primary lessons.

Claire felt strongly that the Homestead Act was influential in giving some Americans opportunities they otherwise would not have been given, stating that it was “very important, particularly for whites and immigrants to start new lives. Anyone could go and get land out there, so it gave many an opportunity that none would have had before, particularly immigrants.” Beyond initial sourcing exercises, Claire seemed most focused on the effects that the Homestead Act had on Americans. When prompted to speak to the

impact of the Homestead Act on Native Americans, she simply acknowledged that it was “detrimental to their culture”. It is important to note that she did not mention the theme of Westward Expansion via Manifest Destiny and the Age of Reform from 1820 to the 1860s in her interview or while teaching with the Homestead Act poster primary source, despite the two being inexorably intertwined. Westward expansion offered a vehicle by which the Manifest Destiny ideology could be realized, but it was specific policies such as the Homestead Act that translated this belief into reality in the west. By simply asking, “How might the author of this poster feel about Manifest Destiny?” Claire could have spurred a discussion that would have helped provide a deeper context to the Homestead Act.

**Debriefing Historical Perspective Taking Activities.** Throughout her student teaching placement, Claire engaged her students in several historical perspective taking activities. In these she successfully moved students into the past, allowing them to act from a perspective of a historical figure, but she did not create opportunities for students to debrief the substance or the process of the activity.

The use of perspective taking as a pedagogical method in history classes has been shown to increase student interest and engagement in history, increase students’ critical thinking skills and help students internalize the experiences of the historical figures they study (DiCamillo & Gradwell, 2012).

Having learned of these benefits in her methods classes at her university, Claire decided to engage students in an activity in which they would write a journal entry from the perspective of a Cherokee Indian who was recently forcibly relocated on the Trail of Tears. Her instructions were:

Imagine you have just been removed from your home by the Indian Removal Act and that you are traveling on the Trail of Tears. Write a journal entry expressing your emotions surrounding the removal and the Trail of Tears. How would someone have felt while being removed from their home? Think about how you would feel and then put that in the context of the Indian Removal Act.”

Though this assignment was prepared and presented in a way that was understandable to students, Claire did not allow students to step outside of their role as a Cherokee Indian after they completed this activity. Students had learned about the Trail of Tears primarily through the vantage point of two people involved in it. This provided students with an insight that they could use as a foundation to write their journal entries.

While teaching with excerpts of the Declaration of Sentiments primary source (lesson 9), Claire engaged students in a perspective taking activity but again failed to have students debrief their roles. Students were separated into five groups, each representing a different group of women in the 1800s. The first group was the New England mill workers who were young white single women who were born on farms in New England but who have come to Lowell, Massachusetts to work in the textile mills. They strongly advocated for better working conditions and were integral to the “10-hour movement” to reduce working hours from 12 or 13 a day down to 10. The second group was a group of enslaved African American women who desired the abolishment of slavery. The third group was a group of Cherokee women who wanted a guarantee that the U.S. government would not take Indian land. The fourth group was comprised of middle- and upper-class white reformers who wanted to abolish slavery and gain more access to higher education. Lastly,

the fifth group were women in the newly conquered territory of New Mexico. They desire access to land, water, and economic opportunity.

In this historical perspective taking activity, Claire had each group make a list of what they desired at the Seneca Falls Convention. Then, they interacted with other groups to gain a perspective on what other groups of women wanted at that time. After searching for similarities between the groups, each group made a list of resolutions that their group of women would have promulgated at the convention. Claire gave the following example to the class: “Resolved that it should be against the law for a man to beat his wife”. She also gave potential examples of categories that their resolutions could fit into including slavery, divorce and children, working conditions, and political participation. Despite this wonderful historical perspective taking activity, Claire still did not provide an opportunity for students to debrief about the substance or process of the Seneca Falls Convention. After the activity, Claire could have simply had students engage in a full class discussion about the demands that each group of women had at this time and why some groups had similar demands.

**Connecting the Past to the Present.** During her interviews, Claire would articulate present-day connections to historical content, but she rarely addressed such present-day applications with her students. For example, while teaching about Andrew Jackson and Indian removal, she did not discuss the impact on conditions of Native Americans living today. While she was not expected to teach history thematically, she easily could have provided students a few examples of reservation life that would have helped students understand the pattern of treatment by the U.S. government towards Native Americans. It is interesting that she did not integrate a few modern day examples into her teaching

because during her interview on the topic she spoke passionately about the living conditions on the Pine Ridge Reservation in South Dakota. In her interview she stated that, “The Pine Ridge Reservation has some of the lowest standards of living on the continent”. Claire could have even made a connection between treatment of Native Americans by the U.S. government and the popularity of the term “savage” today. This microaggression is one that is common in middle school students’ lexicon in 2016. She also could have discussed how Harriet Tubman will be replacing Andrew Jackson on the front of the \$20 bill.

There were other opportunities to connect the primary sources that Claire taught to current events including Claire’s lessons about Texas independence, the Declaration of Sentiments, and the 19<sup>th</sup> Amendment. For Texas Independence Claire could have mentioned how the idea of immigration is still a divisive one today and one that impacted the 2016 presidential election. Claire’s use of excerpts of the Declaration of Sentiments (lesson 9) and the 19<sup>th</sup> Amendment could have led to a discussion about women’s rights today including the historic Women’s March that took place on January 21, 2017 – which occurred only a month before these lessons.

### **Contextualization Within Historical Thinking**

One of the most important jobs of history teachers is to promote historical thinking skills or the ability to reflect, synthesize, and construct understandings of history based on evidence (Salinas, Bellows, and Liaw, 2011). Students’ ability to contextualize primary sources and read critically helps them reconstruct and interpret the past to better understand history (National Council For The Social Studies, 2017). Unfortunately, unlike historians, students are not skilled at constructing meaning with multiple text sources.

Nokes (2011) outlines four barriers to students' ability to read like historians: (1) analyzing historical documents taxes students' cognitive resources beyond their bounds; (2) students have limited historical background knowledge and misapply the background knowledge they have; (3) students tend to hold unsophisticated views of the world; and (4) students have a false sense of what it means to study history.

Claire sought to address the first barrier that Nokes (2011) describes involving high demands on students' cognitive resources by expanding students' existing vocabulary. Several of the primary sources that Claire used during her teaching involved unfamiliar words that could have consumed her students' working memory and therefore left few cognitive resources remaining for demanding tasks such as analysis or evaluation. For example, in her use of the Texan Declaration of Independence primary source (lesson 8), Claire underlined eight words in the primary source and defined them for her students on a Google Slides. They included: ceased, legitimate, derived, inalienable, despotism, malfeasance, anarchy, and abolish. Likewise, in a lesson about the Homestead Act Claire introduced students to the terms "long drive" and "sodbusters" prior to analyzing a Homestead Act poster. By pre-teaching these vocabulary words, Claire was able to set her students up to be successful when analyzing the primary source.

Pre-teaching vocabulary was not the only instructional intervention that Claire utilized to help ease her students' high cognitive demands while working with primary sources. She also helped build basic comprehension by introducing concepts that students would encounter during these activities. For example, while utilizing the Texan Declaration of Independence primary source (lesson 8), she also pre-taught students about the four requirements for Americans to settle in Texas. This was important to know as it helped

build students' understanding of the growing tension in the Texas territory during time leading up to Texas' declaration of independence. While teaching students about the Declaration of Sentiments, Claire first gave students some basic background information such as the date of the convention (July, 1848), that it was organized by Lucretia Mott and Elizabeth Cady Stanton, that female abolitionists had turned their attention to gaining more rights for women and that about 200 women and 40 men attended the event in Seneca Falls, New York. While this is certainly a short-term contextualization and perhaps an episodic understanding of the Declaration of Sentiment, without this background information students would have been entirely lost and unable to analyze the primary source.

Students can also encounter high cognitive demands while engaging with primary sources due to the difficulty of synthesizing across multiple texts. Claire attempted to deal with this challenge by drawing her students' attention towards similarities and differences between primary sources students had engaged with earlier in the semester. While teaching with the Declaration of Sentiments primary source (lesson 9), she highlighted the line "we hold these truths to be self-evident" to help draw students' attention to the parallel between this document and the Declaration of Independence that sparked the American Revolution. She also did this through her presentation of the Texan Declaration of Independence primary source by highlighting phrases such as "lives, liberty, and the property of the people". In both cases, she then asked students to compare and contrast the documents. She engaged students in the same process while using two primary sources involving the Trail of Tears. While using two primary sources – one supporting suffrage and the other opposing it – she gave her students a graphic organizer to provide

scaffolding that supported her students' engagement in the difficult process of constructing an understanding of an event from multiple historical documents. This corroboration or comparing sources to one another in an attempt to evaluate the quality of the document or strengthen a claim is essential to contextualizing primary sources (Wineburg, 1991).

Another barrier to students' reading like a historian involves their limited background knowledge. When historians analyze primary sources they are able to place themselves in the context of the document. To do this, historians must have a great deal of background knowledge about the time period. Claire was successful in providing short-term contextualization but not for long-term contextualization for most of the primary sources that she used during her teaching. For example, while teaching about President Andrew Jackson's speech to Congress *On Indian Removal*, aside from sourcing the speech she provided her students with a look into the Jackson presidency through a political and economic lens, discussing with her students the election of 1828, his log-cabin-to-White-House persona, the spoils system, and the tariff debate. However, Claire did not fill in gaps of student knowledge with regard to the U.S. government and Native American relationships leading up to Jackson's 1830 speech to Congress. Had she done this, Claire's students may have been better able to analyze and evaluate this primary source because they would not be hamstrung by their limited background knowledge.

Students' simplistic views of the world often prevent them from being able to read like a historian. Adolescents have an inclination toward dualism, or viewing the world in terms of absolutes of good or bad (Nokes, 2011). Claire was successful in combating this oversimplified world view while engaging students in the transcript of President Jackson's speech to Congress *On Indian Removal* (lesson 1). Many students immediately assumed

that President Jackson signed this act because he was a – in the words of one student, “a horrible person”. Claire pushed back against this assumption and informed students about the economic ramifications of Indian removal – most notably the gold that was found in the hills of Georgia. She also prompted them with questions about the political ramifications of opening up this land to white settlers. Students began to refrain from calling President Jackson disparaging names and began to say mutter phrases like, “I hate that he did that, but I get it”.

Additionally, students’ unsophisticated world view manifests in intellectual reductionism. When discussing the arguments for and against suffrage around the turn of the twentieth century, many students assumed that all of the opponents to a suffrage amendment would be men. Their simplistic view of the issue was rocked when Claire read to them statements by women like the following: “If women should vote, they must join one of the existing political parties or form a new party of their own — a Woman's Party — and that would be women against men, and more dangerous than labor against capital” (Weeks, 2015)

She explained how there were many women opposed to such a suffrage amendment and that in fact there were many women active in the Anti-Women’s Suffrage League. Claire was successful at breaking students of this intellectual reductionism and presentism. The differences between historians’ ability to engage in historical and students’ ability to do so are rooted in students’ cognitive development, knowledge base and experience, view of the world, and view of the discipline of history. Considering her limited experience in the classroom, Claire was successful in how she pedagogically contextualized and how she

used content to contextualize historical content relative to what the literature on historical thinking suggests is good practice.

Monte-Sano (2011) writes that pedagogical content knowledge in history education can be broken down into four categories: representing history, transforming history, attending to students' ideas about history, and framing history. "Representing history" focuses on ways in which teachers communicate to students the nature of historical knowledge. Claire's lesson on the "Interpretative Nature of History" is a good example of this. She referenced the conflicting narratives of Manifest Destiny portrayed by the School House Rock "Elbow Room" video that she showed and the Trail of Tears primary sources that she used in class. Claire thoughtfully chose to use a variety of sources (the textbook, government documents, diary entries, paintings, etc.) to show that history is not synonymous with the notion of one Truth.

"Transforming history" refers to how a teacher can transform history content into materials, lessons, and units. This can include a teacher modeling a skill for students. Claire modeled how to use the primary source analysis sheet that students used in class.

"Attending to students' ideas about history" focuses on students' conceptualizations of history. Claire helped combat students' preconceived notions about history being a stagnant set of facts by engaging them in an activity involving the Declaration of Sentiments. Students took on a role of a particular group of women and constructed new meanings of what "women's rights" meant. This broadened students' perspectives.

"Framing history" emphasizes teachers arranging topics within history to communicate cause and effect relationships. As mentioned earlier, Claire tended to present the notion of change as something that happened suddenly. Claire unintentionally implying

that Jackson's 1830 *On Indian Removal* speech immediately caused the 1830 Trail of Tears is a good example of this. This simple cause and effect relationship contrasts with continuity and change, which views change as something that can slowly unfold over time.

### **Summary**

This chapter included a presentation of findings that were drawn from the data analysis as previously discussed. Two major patterns emerged during Claire's teaching. First, Claire presented students with an episodic view of history. She successfully taught primary sources through short-term contextualization, with an emphasis on short-term context despite showing knowledge of historical content that matched a long-term contextualization during her interviews. Second, she presented historical content to students through the lens of simple cause and effect, even though during interviews she explained her thinking about historical events within the context of continuity and change.

In her attempt to pedagogically support students' ability to historically contextualize primary sources, Claire consistently fell into three pedagogical habits. First, she assumed that providing background knowledge to students several days before engaging students in a primary source would suffice as appropriate historical contextualization. Second, she rarely helped students debrief the process or substance of perspective taking activities. Third, she did not present students with opportunities to connect historical content to the present. These three pedagogical patterns constrained Claire's ability to historically contextualize primary sources. Several conclusions can be drawn based on these findings, as well as several recommendations for teacher educators. In the next chapter, I will discuss implications of these findings and avenues for future research.

## Chapter Five: Discussion

### Introduction

The process of contextualization is a key competency of historical reasoning (Seixas and Morton 2013). As such, this study investigated how one preservice teacher contextualized sources of historical evidence and how she pedagogically contextualized the sources for her students. Utilizing a constructivist theoretical framework as a critical lens to examine ways in which Claire conceptualized her use of primary sources in the classroom, Claire constructed new concepts of how to contextualize historical sources. This is aligned with constructivism, which describes “knowing” and how one “comes to know”, and to pedagogical content knowledge (Jonassen, 1991). The essence of PCK asks teachers to draw upon several bodies of knowledge, skills, and experiences to make sense of their teaching and to be better able to transform what they are expected to teach in a way that makes sense to students (Shulman, 1987). Because of her relative lack of classroom experience, Claire continually focused on how to transform her knowledge of historical context into meaningful activities for her students.

This study involved three bodies of research – research focused on pedagogical content knowledge, primary sources, and historical contextualization. Qualitative case study design is conducive to documenting the meaning that Claire gives to “everyday events” in the classroom that informed her thinking. Face-to-face interviews, written questionnaires, and video recordings served as the data collection methods throughout this ten week study. Since qualitative research is necessary when the nature of research questions requires exploration (Stake, 1995), categorization and analysis occur through

the use of qualitative methods. In exploring the ways in which a preservice teacher thinks about her use of primary sources in an 8<sup>th</sup> grade U.S. history classroom, the following research questions framed the inquiry:

(1) How does a preservice teacher historically contextualize primary sources for herself and for her 8<sup>th</sup> grade U.S. history students?

(2) What does her pedagogical use of primary sources with her 8<sup>th</sup> grade U.S. history students reveal about how she historically contextualizes such sources?

Due to the nature of this study, several limitations were identified. Generalization of the findings is limited as the data came from a single case study focused on one pre-service teacher. The report of findings may not represent how PSTs use primary sources with students of differing abilities, differing ages, or in differing geographical areas. Also, Claire worked with a relatively small sample size of students, making this study difficult to generalize. Additionally, this study is limited by the pre-service teacher's ability to articulate her thinking as it related to her teaching. Claire also only planned and taught several units of her own, which may have made it difficult to approach the content from the perspective of continuity and change. Lastly, this study focused on a relatively narrow range of topics also limits generalizability.

Chapter One provided a discussion of the purpose of this study and its associated research questions. Chapter Two included a summary of the prevailing literature on pedagogical content knowledge, primary sources, and historical contextualization. Chapter Three revealed a detailed description of the data collection and analysis methods employed in answering the research questions. Chapter Four presented the findings in relation to the research questions.

This particular chapter is comprised of four sections. The first section summarizes the findings from Chapter Four. The second section is a discussion section in which I describe potential causes of Claire's lack of deep historical knowledge and her use of historical organizing tools such like continuity and change. The third section suggests recommendations for future research. Lastly, the fourth section focuses on recommendations for future practice by clinical supervisors, secondary social studies methods instructors, and preservice teachers.

### **Summary of Findings**

The previous chapter presented the findings of this ten week qualitative case study. Findings were drawn from the data analysis as discussed in Chapter Three. After collecting data, two major patterns emerged during Claire's teaching. First, Claire presented students with an episodic view of history. This meant that she contextualized the past primarily in terms of things that happened suddenly which caused change, rather than slow, unfolding, and less-observable change (Lee and Cercadillo, 2013). This sharply contrasted with the way she personally contextualized historical content, which tended to be more aligned with long-term contextualization. This type of contextualization distinguishes itself from short-term contextualization by its emphasis on connecting historical developments, events, and people to enduring themes in history. Second, Claire presented historical content to students through the lens of episodic and simple cause and effect, even though during interviews she explained her thinking about historical content within the context of continuity and change.

In her attempt to pedagogically support students' ability to historically contextualize primary sources, Claire consistently fell into three pedagogical habits. First, she assumed that providing background knowledge to students several days before a

lesson would suffice as appropriate historical contextualization. Second, she rarely helped students debrief the process or substance of perspective taking activities. Third, she did not present students with opportunities to connect historical content to the present. These three pedagogical patterns constrained Claire's ability to historically contextualize primary sources.

## **Discussion**

Claire's responses during interviews initially suggested that she held a deep historical knowledge of United States history. However, shortly thereafter it became clear that Claire lacked a deep, rich historical knowledge which limited her historical understanding. Her limited historical knowledge revealed itself through her teaching in which she often presented history as a series of historical events untethered to a historical theme. However, in this context of her episodic approach, she did display a broad knowledge of seemingly significant events. Given her limited historical understanding, she struggled to transform her historical knowledge in a way to provide students with a meaningful long-term historical context. In a sense, she operationalized the historical context through an episodic presentation of the past and through her struggle to thematically organize the historical context.

It is difficult to overestimate the importance of a history teacher's ability to historically contextualize primary sources. Scholars agree that secondary school history education should involve more than the rote memorization factual recall (Van Drie and Van Boxtel 2008; Wineburg, 2001). Therefore, the ability to perform historical contextualization is essential to building one's historical thinking skills. It can give life to primary sources that many students feel are flat and lifeless. Reisman and Wineburg

(2008) write that without an appreciation of context, historical content is like a “two-dimensional image that dwells in the shadows of an ever-more vibrant present” (p. 206).

Unfortunately, historically contextualizing primary sources is as difficult as it is essential to weave a vibrant portrait of a historical period for a group students. Wineburg (1991) famously called it an unnatural act. Haydn et al. (2015) write that to teach historical contextualization, teachers must not only possess expert levels of subject content knowledge but also activate students to acquire knowledge and help them apply this knowledge to gain different historical reasoning competencies.

It is important to note that considering her relative lack of classroom experience, Claire did an excellent job of providing short-term contextualization for the primary sources that she taught during this study. Although she occasionally fell into the common trap of presentism, or viewing the past through the lens of today without consideration of historical context, she generally was able to avoid it. Teachers and students alike find presentism difficult to avoid (Vansledright, 2009). Presentism impedes students’ ability to historically contextualize content by causing them to draw inappropriate conclusions about the lives of individuals who lived in conditions very different from students’ experiences. Claire’s use of short-term contextualization was important in combating presentism. As VanSledright notes, contextualization encompasses the use of imagination, empathy, and moral judgment in order to avoid presentism (1997). Claire deserves praise for having a basic understanding both themes – Westward expansion by way of Manifest Destiny and the Age of Reform from 1820 to the 1860s – and trying to implement them into her teaching.

Despite successfully providing students with a short-term contextualization of

primary sources, Claire lacked a deep, rich historical knowledge, which limited her historical understanding. This lack of depth caused Claire to present an episodic view of history, which prevented her from connecting the content to the enduring historical themes of Manifest Destiny in Westward expansion and the Age of Reform from 1820 to the 1860s. These two themes held this time period together and as such she organized her content accordingly, oscillating back and forth between the two, but she was not able to make this apparent for her students. This stemmed from her lack of deep historical content knowledge. VanSledright (1996) argues that “History teachers need to possess deep knowledge of their discipline and robust understandings of how to teach it,” (p. 263). Perhaps the defining skill of a historian is the ability to place one’s self in the context of a document’s creation (Wineburg, 1991). This is an extremely difficult and complicated task. It often requires a great deal of background knowledge about the geography, time period, personalities, values, and trends of the era in which the primary source was created (Nokes, 2001).

For example, when Claire was teaching a lesson about John Gast’s famous painting *American Progress*, she did an excellent job in helping students analyze the painting by pointing out the Brooklyn Bridge in the background and connecting it and the power lines to the idea of industrialization. After this she engaged students in a meaningful discussion of the importance of light in the painting, emphasizing that the east appeared bright and the west looked dark. However, when a student asked if the figure in the center of the painting was holding a Bible, Claire responded by saying, “No, it’s just a book”. In truth, the book is not a Bible, but rather it is a textbook, representing the common school – an emblem of education and the testimonial of America’s national enlightenment. In the

nineteenth century, most schools were poorly funded, and many teachers lacked training and some citizens opposed the notion of compulsory education. Additionally, there were restrictions on who could attend school. White girls and African Americans were often excluded. It was Horace Mann, an educational reformer, who founded the nation's first "normal school" where high school graduates were trained to become teachers. Claire was aware of the historical development and importance of the common school reform in the nineteenth century. When asked to speak to the significance of this reform movement, she stated: "I think it's important because it had a great impact on the everyday person. Women and non-whites were slowly allowed to attend school, which is something that they weren't allowed to do before. Eventually colleges and universities would accept begin to accept them."

Claire's lack of sophistication to thematically conceive of and act on the historical content inhibited her ability to historically contextualize the primary sources. Clearly, Claire possessed background knowledge about both the *American Progress* painting and the educational reform movement of the nineteenth century. However, she lacked deep, rich historical knowledge, which limited her historical understanding. Without this deep understanding, it is difficult to fully contextualize primary sources. Huigen, van de Grift, van Boxtel, & Hothuis argue that to best historically contextualize primary sources it is imperative to have a "deep understanding of the social, political, and cultural norms of the time period under investigation as well as knowledge the events leading up to the historical situation and other relevant events that are happening concurrently" (p. 16). She presented her knowledge of the *American Progress* painting and educational reform in the nineteenth century to her students through an episodic view of the past. By asking Claire if

the figure in the center of the painting was holding a Bible, her student provided Claire an opportunity to connect the painting to the Age of Reform theme. Furthermore, she missed an opportunity to present progress as an idea unifying both themes within the time period because she lacked the sophistication to conceive of progress in such a way.

Lastly, by not providing students with opportunities to debrief during historical perspective taking activities, Claire missed an opportunity to further contextualize primary sources. Debriefing these historical sources would have allowed students to step out of the historical context that Claire created and help them discuss their experiences engaging with historical content. Done correctly, the debriefing process provides students with a distinction between the present and the reality of the past. This is one method for preventing presentism. Also, debriefing sessions offer history teachers a chance to connect the primary sources to other historical content and themes through the use of historical organizing tools like continuity and change.

**Continuity and Change.** History is viewed by many as the memorization of names, dates, places, and events. However, history is a diverse and multilayered discipline that should be understood as a complex interplay between continuity and change. This allows historians and experienced history teachers to examine trends and turning points throughout time, looking at aspects which remain stable while others vary, and examining the varying speed, direction, and nature of those developments.

Claire successfully presented history content through the notion of episodic simple cause and effect, but struggled to present history content through the lens of continuity and change. This historical thinking concept is important because it can show how the past affects the present. Although historical figures only live for a relatively short time, ideas,

institutions, beliefs, and problems can endure for long periods of time. This is known as continuity. While continuity is important in the study of history, historians also recognize that society is constantly undergoing change.

Claire is not alone in her difficulty to teach continuity and change in a history class. Thompson (1984) argued that change is a historical concept that is initially difficult to understand. It is common to comprehend the notion of change as episodic, rather as continuous (Haydn, Arthur, & Hunt, 2014). This view of change in history is reinforced through the structure of most history classes down to the syllabus, which is itself episodic, passing from one event to another with little clear relationship to that which precedes or follows. Others argue preservice teachers' tendency to present history through a lens of simple cause and effect rather than continuity and change stems from school environments not being conducive to time-consuming teaching strategies (De Oliveira, 2008). Shemilt (1980) concludes that difficulty in comprehending the historical thinking skill of continuity and change may derive from an inability to imagine the daily life in which the primary source was created. Too often history teachers present students with a series of events without the proper context to allow students to view continuity and change over time.

Fortunately, Claire did not make the common mistake like many preservice teachers who view changes in history as the same as progress. When discussing John Gast's *American Progress* painting, she had the following conversation with a student in front of the class. It highlights Claire's reluctance to view history as the inevitable march of progress towards some fulfillment of the present:

Claire: "This painting is called *American Progress*. What comes to mind when you hear this word 'progress'?"

Student: Getting better and something...improvement.

Claire: That's right. I think of it as being synonymous with working towards improvement and advancement. Do you think everything in history was part of "progress"?

Student: Yeah, probably. I mean, everything kinda led to today.

Claire: There's no doubt that there was progress made in the 1800s with technology. But what about civil rights? There's some evidence of progress, like an advancement in suffrage with poor white men during Jackson's time, but what about Native Americans? They were forced off of the land that had been their home for thousands of years during the Trail of Tears."

This back and forth not only shows that Claire holds a sophisticated view of progress in U.S. history, but it prompted a discussion in which students could consider interpretive nature of history.

One difficulty Claire encountered during her teaching was framing the idea of change as occurring at once. This was a direct result of her episodic presentation of history. An example of this was Claire's lessons about Indian Removal. The transition between her lesson involving Jackson's speech to Congress (1830) and her lessons about the Trail of Tears conveyed the idea that these two events happened quickly in succession. In reality, the majority of the Cherokee Indian Nation walked on the Trail of Tears in 1838. In between Jackson's speech to Congress in 1830, the Choctaw became the first Nation to be removed (1831), followed by the Seminoles in 1832, the Creeks in 1836, and the Chickasaw in 1837. That Claire only highlighted the Cherokee's 1838 experiences on the Trail of Tears framed the journey as a singular historical event. Presented through the lens of continuity

and change, the Trail of Tears can be seen as “more than a singular event in history” and that the “trail has come to symbolize the culmination of American Indian removal policy in the in early 19<sup>th</sup> century.” (Gaines & Krakow, 1996, p. 159). What can make the historical thinking skill of continuity and change even more difficult is that the fact that while some things change throughout history others do not. Indian removal illustrates this perfectly. At some points during the 1830s, American Indians voluntarily resettled. At other times, American Indians were forcibly removed. This distinction is a necessary one to gain a deep understanding of Indian removal in the 1830s and the broader ongoing “Indian Removal” policy that endured throughout the 19<sup>th</sup> century. Change and continuity is not always obvious and “to that degree requires a level of understanding which is quite sophisticated” (Haydn, Arthur, & Hunt, 2014, p. 117). Claire lacked this level of sophistication, therefore causing her to present the content as a series of historical events rather than as a historical development. This inhibited her ability to historically contextualize the primary sources she used with her students during her lessons on Indian removal.

The findings of this study align with the larger body of literature on pedagogical content knowledge and preservice teachers’ use of primary sources. Specifically, the findings of this study are similar to the results of Lovorn’s (2012) study in which he concluded that many preservice teachers do not have deep backgrounds in historical thinking skills. Claire’s inability to provide a long-term contextualization for the primary sources she chose to use during this study was not surprising. Other studies, such as Oromond (2011) found that because of their limited experience, preservice teachers often lack the skills to be able to help students effectively contextualize primary sources. Mayer

(2006) concluded that preservice teachers have long struggled in trying to teach historical inquiry skills through the use of primary sources.

Research shows that preservice teachers often only choose what Doppen and Tessar (2008) refer to as “founding documents”, such as the Declaration of Independence, U.S. Constitution, Bill of Rights, and Emancipation Proclamation. To her credit, Claire selected a wide range of primary sources. For example, several of Claire’s lessons were grounded in “founding documents”, such as the Indian Removal Act and the Homestead Act. Nonetheless, she chose to go beyond them, so as to ensure multiple voices were represented. This diverse selection of documents – and one painting – helped provide her students with opportunities to analyze historical documents that many students had never seen before. However, by going beyond “founding documents”, she moved further into areas where her lack of deep historical understanding might be revealed.

### **Contextualizing the Issue of Race in U.S. History**

History curriculum tends to address racism in the form of success stories, that is instances where the U.S. improved conditions for peoples, particularly African-Americans and women. As Van Sledright (2008) writes, “celebratory progress in achieving a ‘we-ness’ trumps a past of ethnoracial conflict and violence. It is a history of success, seldom if at all of struggle or failure” (p. 114). Other historians like Kammen (1989) argue that we teach “heritage” rather than history and that heritage can be seen as “up-beat and affirmative in an unqualified way about the American past” (p. 151). While this national narrative serves an important role in the ideological and intellectual shaping of American students’ views of the growth of our nation-state, it results in the omission of particular groups of people and events.

Claire challenged this by demonstrating strong interest in Native Americans and through her commitment to devote instructional time to the Cherokee and their time on the Trail of Tears. The way that she addressed race not only highlighted her limited ability to provide long-term contextualization for her students, but also the shortcomings of that limitation, such as taking away the Cherokee's historical agency. She did not discuss efforts by the Cherokee people to try and remain where they lived within the eight years between the Indian Removal Act and the Trail of Tears, such as the adoption of a written language and their role in the U.S. Supreme Court case, *Cherokee Nation v. Georgia*. Despite this, the way she addressed race is also evidence of her efforts to move beyond an episodic approach, such as her effort to provide voice to the Cherokee people along the Trail of Tears.

She did not mention Native Americans while teaching about the Homestead Act or mention that posters like the primary source that she used were primarily intended for white males. Claire may have unknowingly promoted an otherness by failing to acknowledge the poster's intended audience and who was not a part of that audience.

As mentioned earlier, there was a disconnect in Claire's teaching about slavery, abolitionism, and westward expansion. She did not discuss slavery or abolitionism while teaching about Texas Independence or the Homestead Act. This decontextualized the events and showed Claire's lack of deep historical knowledge and understanding. Finally, while she was aware of specific episodes of racism in U.S. history, I am unclear if she views racism as an enduring theme in U.S. history.

Historically contextualizing primary sources is undoubtedly a constructivist meaning making endeavor. Throughout the course of this study, Claire gained valuable

insight into ten primary sources. Despite this, there was no clear evidence that Claire shifted from providing her students with short-term contextualization to consistently providing long-term contextualization of primary sources. She continued to present change as something that happened suddenly in history, rather than something more akin to continuity and change. Understandably, her episodic presentation of the past endured throughout the course of this study.

### **Recommendations for Future Research**

The following recommendations are offered for related research involving preservice teachers' contextualization of primary sources in the classroom:

1. Given that this study supports the notion that preservice teachers lack a deep knowledge of history, outlining ways in which preservice teachers can increase their knowledge of history would prove valuable to the discipline. One's ability to contextualize primary sources requires a deep understanding of history and despite the importance of historical thinking skills, researchers know little about how, when, and where people learn them, especially contextualized thinking (Stahl et al. 1996; Wineburg 2001). Uncovering the process by which individuals can develop contextualized thinking would enable methods instructors to help cultivate preservice teachers' ability to provide historical contextualization for their students during their student teaching placement.

2. While there have been numerous studies focusing on the use of high school social studies preservice teachers' use of primary sources, there have been considerably fewer studies focused on middle school preservice teachers' use of primary sources. It may be advantageous to conduct this research as it would shed light on the importance of providing deep background knowledge to younger students as they work with primary

sources.

3. Different types of primary sources may lend themselves to be contextualized more easily by preservice teachers than other sources. Investigating these differences could be useful to help prepare preservice teachers to be successful in the classroom.

4. One area of interest that falls outside of the scope of this study is a preservice teacher's use of sourcing and corroboration of primary sources. These, in addition to contextualization, comprise Wineburg's (1991) three heuristics. How does a preservice teacher's use of all three of these heuristics reveal about his or her depth of historical knowledge?

5. While this study focused on one preservice teacher, it would prove beneficial to extend this study by including another preservice teacher's experience with historically contextualizing primary sources in an 8<sup>th</sup> grade history classroom.

6. Lastly, what if a preservice teacher were able to teach several units that addressed several themes? By expanding the study in this way, a researcher might have a clearer idea of how the preservice teacher conceptualizes themes in U.S. history.

### **Recommendations for Future Practice**

The suggestions below are for clinical supervisors, social studies methods instructors, and preservice teachers. These recommendations serve to provide various stakeholders with ideas to improve preservice teachers' ability to historically contextualize primary sources. Often, this will include helping preservice teachers develop a deep background knowledge of history, which can help preservice teachers connect historical events to historical themes, rather than present history episodically. It is important that preservice teachers improve their own historical thinking skills so that they may develop

activities that will help promote historical thinking skills in their students.

**Clinical Supervisors.** Preservice teachers report receiving marginal, if any, support from their clinical supervisors, while being held to an expectation to present historical material in predictable, traditional manners (Lovorn, 2012). This only serves to prevent preservice teachers from experimenting with various primary source lessons and activities. Consequently, many preservice teachers enter their first job as teachers who present history a grand narrative or a series of facts to be memorized (Blaszak, 2010). By presenting history as a stagnant rather than as an interpretive discipline, preservice teachers may contribute to the apathy of secondary students who are asked to analyze primary sources. Meaningful historical knowledge should include important facts, but also how historical interpretations, arguments, and narratives are constructed.

**Secondary social studies methods instructors.** Although many secondary social studies methods instructors introduce teaching strategies related to historical contextualization of primary sources, many preservice teachers feel they have received incomplete training in the use of historical thinking and have low confidence in “doing history” (Lovorn, 2012). Helping preservice teachers gain skills in historical contextualization, methods instructors should help engage preservice teachers in a variety of interpretive historical thinking activities. These activities should help augment students’ limited experiences in “doing history” and challenge their assumptions about history.

One example of this sort of activity could be what Lovorn (2012) refers to as a “Historical Thinking and Historiography Report Project” (p. 572). There are three components to this semester-long project. First, preservice teachers will read a discuss several works on historical thinking. The methods instructor will focus on practical

applications in the secondary social studies classroom. Second, the preservice teachers and the instructor go on a field trip, where they will study a site of regional historical significance. While there, students will hear opposing histories about the site. When they return, students will engage in a group analysis of the trip, synthesizing what they learned from the readings and the trip. Third, students will present a report and introduce a related, original lesson or mini unit. For a full explanation of this project, see Appendix F.

Preservice teachers often are reluctant to use primary sources in the classroom because they lack a deep background knowledge of the event and time period in which the primary source was created. This led Claire to present an episodic view of history. Preservice teachers also struggle with how to use primary sources when presenting them to students of varying reading levels. However, preservice teachers should be encouraged to differentiate primary sources for their students. Wineburg and Martin (2009) argue that preservice teachers should adapt primary sources for struggling readers. While in their methods classes or in a differentiation class, preservice teachers could practice modifying primary sources for students of varying lexile scores. Wineburg and Martin (2009) suggest three main principles to guide a preservice teacher's modifications of primary sources. They are: (1) *Focusing* – the use of sagacious excerpting of long documents; (2) *Simplification* – the selective modification of complicated syntax and vocabulary; and (3) *Presentation* – enlarge font and maximize the white space on the page.

**Preservice teachers.** Beyond simply enriching her historical background knowledge by increased time in the classroom, Claire and other preservice teachers could read detail-rich historical fiction. This could promote historical empathy and perspective taking, which in addition to raising awareness of present-oriented perspectives when examining the past,

are skills that are closely related to historical contextualization (VanSledright & Franks, 1998). Also, the traditional history curriculum in secondary schools favors breadth over depth. This can cause teachers to feel pressured to superficially cover many topics rather than deeply cover a few topics. Using case studies can help to illustrate important historical concepts can be beneficial in enhancing historical background knowledge (Tovani, 2004). Using case studies could improve Claire's background knowledge by immersing her in the historical contexts where foreign social, political, and cultural norms of the time period. Because Claire's lack of background knowledge often led her to present history episodically, increasing her background knowledge by reading historical fiction could help her connect historical events to historical themes.

### **Conclusion**

Wineburg (2001) reminds us that "we are all called on to engage in historical thinking – called on to see human motive in the texts we read; called on to mine truth from the quicksand of innuendo, half-truth, and falsehood that seeks to engulf us each day" (p. 83). If Wineburg is right, then middle school history teachers and preservice teachers have a wonderful opportunity to help teach students to think in sophisticated ways. Consider the following statement:

*"Mary hid her hands behind her back and crossed her fingers before she answered."*

The above statement sounds innocent enough in the context of modern society. Perhaps Mary is nervously participating in a school spelling bee.

Now, imagine that this statement came from a transcript of a court document in Salem, Massachusetts in 1692. Religious fervor ran rampant, and villagers were obsessed with the presence of the devil and witchcraft infiltrating their community. For a young

woman to tell a lie was fodder for hysteria and violent reaction. A reader might assume that innocent Mary was a candidate for the gallows.

Clearly, context matters. Contextualizing primary sources is not only necessary to best comprehend the primary source, but it also paints a complex picture of history, one that excludes presentism and that allows for multiple narratives. If students are able to debunk the notion that history is synonymous with “Truth”, it will allow students to revise their beliefs with the introduction of new compelling evidence. Preservice teachers, who by nature have very little classroom experience, are often overwhelmed with the idea of providing historical context for students. Even Claire, who was a diligent planner, creative thinker, hard worker, and lover of history, at times struggled to help students make the kinds of connections and inferences that are the rewards of working with primary sources. It should be our goal to do all that is in our power to prepare preservice teachers to help students learn to appreciate the complexities of history, the fallibility of historical actors, and to realize that no explanation of past events is more all-encompassing than the premises on which it was grounded.

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Appendix A  
Formative Evaluation

**UNIVERSITY OF KANSAS**  
**FORMATIVE EVALUATION FOR TEACHER CANDIDATES**  
Completed by: University supervisor\_\_ Clinical supervisor\_\_

\_\_\_\_\_  
Teacher Candidate

\_\_\_\_\_  
Observation Date

\_\_\_\_\_  
School and District

\_\_\_\_\_  
Subject and Grade

\_\_\_\_\_  
University Supervisor

\_\_\_\_\_  
Clinical Supervisor

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Was a written lesson plan provided before this evaluation?

1. \_\_\_\_Yes
2. \_\_\_\_No

**ASSESSMENT OF TEACHER CANDIDATE'S LESSON PRESENTATION**

Take notes, comment on, and assess the lesson delivered by the student. Some things to consider include, but are not limited to, the student's enthusiasm, sense of confidence, presentation of material in lesson plan, ability to notice understanding or confusion in students reactions, organization, use of methods flow, accuracy of information, flexibility, ability to modify when necessary (for the whole class, groups, or individuals), responses to students questions, comments, behaviors, and general classroom management.

KU Teacher Candidate Observation  
Page 2

Use the following scale to evaluate the teacher candidate on each item:

0	1	2	3	4
Not observed	Needs improvement	Developing	Skilled	Exemplary
Not observed during this observation	Not ready to assume responsibility for classroom	Currently developing expected beginning skills	Meets expected skills of a beginning teacher	Exceeds expected skills of a beginning teacher

**Assessment**

The teacher candidate-	Item	Score
	1. Makes students aware of what must be done to demonstrate mastery of the material.	
2. Uses pre-assessments to determine what students already know about content.		
3. Uses informal assessment techniques to evaluate the impact of instruction & the need for instruction modification/differentiation.		
4. Plans/develops formal assessments that validly & reliably measure student learning.		
5. Accurately interprets assessment results.		

Comments about assessment (You may comment in general or indicate an item number(s) from above and focus your comments on this/these items specifically.)

**Classroom Management**

The teacher candidate-	Item	Score
	6. Sets clear standards of conduct & ensures that they are consistently followed.	
7. Creates a classroom environment in which student to student interactions are polite, respectful, & supportive of learning.		
8. Is alert to inappropriate student behavior and responds in a way that is fair and minimally disruptive to class.		
9. Organizes tasks/manages students so that students are engaged in learning most of the class period.		
10. Communicates with students in an effective, positive, & dignifying		

	. manner.	
11	Conveys genuine enthusiasm for subject, & students respond positively to enthusiasm.	
12	Incorporates technology into classroom management tasks.	

**Comments about classroom management (You may comment in general or indicate an item number(s) from above and focus your comments on this/these items specifically.)**

**Instructional Planning**

	<b>Item</b>	<b>Score</b>
<b>The teacher candidate-</b>	13 Focuses lessons on content that represents valuable knowledge and that promotes in-depth understanding of the content standards.	
-	14. Develops lessons that have a clearly defined and effective structure (e.g., the effective use of a defined beginning, middle, and end of a lesson).	
	15 Sets clearly defined learning objectives & sequences activities in a way that can build students toward objectives.	
	16 Includes differentiated instructional activities and explains the basis for the differentiation.	
	17 Plans activities that address a variety of levels of thinking skills.	
	18 Describes how he/she will integrate content with other content, across & within content field.	
	19 Describes how he/she will integrate technology into instruction.	
	20 Selects materials that are developmentally and learning objective appropriate.	

**Comments about instructional planning (You may comment in general or indicate an item number(s) from above and focus your comments on this/these items specifically.)**

### Implementation of Instruction

	Item	Score
<b>The teacher candidate</b>	21 Clearly presents directions to and/or explanations of an activity.	
	22. Sets up lesson/activity in a way that helps students understand the connection between the lesson/activity and the learning objective.	
	23 Makes content meaningful for all students.	
	24 Uses materials that are effective at increasing student understanding of the content as well as at improving student engagement.	
	25 Effectively uses examples, mental imagery, role modeling, visual representations, etc. to better illustrate new or difficult concepts.	
	26 Uses strategies that develop student critical thinking, problem solving, & reflection skills.	
	27 Demonstrates in-depth understanding of the content during instruction.	
	28 Asks questions that promote thoughtful responses and deeper understanding of content.	
	29 Accommodates students' questions or interests and uses students' questions and interests to enhance their understanding of the lesson.	
	30 Finds ways to get students to actively participate in their own learning.	
	31 Relates the content of the lesson to the course as a whole and/or to the potential application of content outside of the classroom.	
	32 Incorporates reading strategies throughout lesson.	
	33 Uses knowledge of students' cultures & backgrounds to help students relate content to their prior experiences.	
	34 Paces lessons to ensure that students are neither bored nor confused.	
	35 Uses appropriate accommodations so that all students can contribute and learn.	
	36 Incorporates technology effectively into instructional delivery and student activities.	
	37 Teaches students to effectively apply information technology.	

KU Teacher Candidate Observation

Comments about implementation of instruction (You may comment in general or indicate an item number(s) from above and focus your comments on this/these items specifically.)

**Professionalism**

	<b>Item</b>	<b>Score</b>
<b>The teacher candidate-</b>	38 Fulfills assigned duties and responsibilities and is flexible when · change is required.	
	39. Follows school and district rules.	
	40 Understands and complies with laws & regulations, such as laws · related to the · confidentiality of student information.	
	41 Understands how to question authority in a respectful, constructive · manner.	
	42 Establishes collaborative and productive relationships with colleagues · and parents.	
	43 Demonstrates honesty and respect in all · communications/interactions with students, · parents, and staff.	
	44 · Demonstrates respect for cultural differences in school community.	
	45 Is responsive to students' clues of distress & connects distressed · students to appropriate · resources.	
	46 · Refrains from showing favoritism for any student or student group.	
	47 · Seeks, accepts, and acts upon input about his/her teaching.	
	48 Tries a variety of teaching ideas/techniques, based on research, · colleague suggestions, · and student needs.	
	49 · Reflects upon the impact of his/her instruction on student learning.	
50 · Sets appropriate learning goals for self, based on reflection.		

Comments about professionalism (You may comment in general or indicate an item number(s) from above and focus your comments on this/these items specifically.)

Appendix B  
Reflection Protocol

## REFLECTION PROTOCOL

### Before (anticipatory): ?

1. What is the objective of the lesson?
2. How do you plan to use primary sources to achieve this objective?

### During (contemporaneous):

1. "Set the Stage"
  - a. How did you activate students' prior knowledge relative to the topic?
  - b. How did you present relevant characteristics about the event, time period, or historical figure being studied?
2. "Main Act"
  - a. To what degree did you move students into the past and allow them to act from a historical perspective?
  - b. To what degree did you create opportunities for students to explain why and how they acted in a particular historical role?
  - c. What happened during lesson that illustrated their understanding of the figure and historical situation?
3. "Epilogue"
  - a. How did you debrief what students did?
  - b. How, if at all, did you connect what occurred to other relevant learning or situations?

Appendix C  
Video Recording Protocol

## Historical Contextualization instrument

- 1. Set the focus of historical context (broad, society at large lens and history specific)**
  - a. Activates prior knowledge (relevant to topic and historical figures)
  - b. Uses traits of history where appropriate such as:
    - i. Uses historical sources
    - ii. Gives time indicators
    - iii. Gives duration of phenomena
    - iv. Shows phenomena on timeline
  - c. Presents relevant characteristics about the time
    - i. Gives geographical/special indicators regarding phenomena
    - ii. Shows phenomena on a geographical map
    - iii. Appoints political/governance characteristics at the time of the phenomena
    - iv. Appoints economic characteristics at the time of the phenomena
    - v. Appoints socio-cultural characteristics at the time of the phenomena
  - d. Establish appropriate causes to be referenced later when dealing with effects
  - e. a continuity and change
- 2. Foster historical perspective taking (begins to narrow and places students in the shoes of an historical actor making decisions)**
  - a. Centralizes a historical figure
    - i. Talk about other figures at the time
  - b. Moves students into the past, allowing them to act from a perspective of a historical figure and
- 3. Explain historical contextualization (students step out of context to explain the decisions of historical figures)**
  - a. Creates opportunities for students to explain why they acted the ways in which they did (“If I lived at the time I would have done this because \_\_\_”)
  - b. Explains what other groups of people did at that time and why (debrief/epilogue)
- 4. Raise awareness of present-oriented perspectives (have students step back even more while comparing and contrasting to present times)**
  - a. Appoints the effects of causes worked through in the first category
  - b. Compares phenomena with other times (including the present)
  - c. Places phenomena in long-term developments
  - d. Outlines phenomena from different perspectives

## Appendix D

### Daily Event and Related Theme Outline

### Daily Event and Related Theme

Day	Event & Related Theme	Description of Event & Relation to Theme
1	Manifest Destiny Introduction (Westward Expansion via Manifest Destiny)	"Manifest Destiny" was the term used throughout the 1840s to describe Americans' belief that they were destined by God to spread their beliefs across the continent. This sense of duty created a feeling of unity among many Americans and stimulated westward expansion. The concept justified westward expansion in all its forms and ramifications, including the persecution of American Indians. This ideology also inflamed sectional tensions over slavery, which ultimately led to the Civil War.
2	Andrew Jackson Introduction (Westward Expansion via Manifest Destiny)	This lesson provided a survey view of Andrew Jackson, who expanded voting rights to working-class white men, utilized the spoils system to replace government employees with his supporters, but is most known for pushing the Indian Removal Act through the U.S. Congress, which displaced tens of thousands of Native Americans from their homeland.
3	Indian Removal Act of 1830 (Westward Expansion via Manifest Destiny)	During the 1820's white settlers moved to the interior of Georgia, which was occupied by peoples like the Cherokee. In response, President Jackson proposed and on May 28, 1830, signed the Indian Removal Act, which required the Cherokee and others to exchange and leave Indian lands east of the Mississippi River for land west of the river.
4-5	Trail of Tears 1838- 1839 (Westward Expansion via Manifest Destiny)	In 1838 and 1839, as part of Andrew Jackson's Indian removal policy, the Cherokee nation was forced to give up its lands east of the Mississippi River and to migrate to an area in present-day Oklahoma. The Cherokee people called this journey the "Trail of Tears," because of its devastating effects. Nearly 4,000 Cherokee died on the journey.
6	Missouri Compromise & Sectionalism (Westward Expansion via	The Missouri Compromise is best known as the political deal that maintained the balance of power in Congress between slave and free states, which Missouri as a slave state and Maine as a free state. Because it also stipulated that in the future, slavery would be prohibited north of the southern boundary of Missouri (the 36° 30' parallel) the Compromise contributed to Westward Expansion. It

	Manifest Destiny)	essentially extended free territory west of the Mississippi River across the northern Great Plains (Black, 2016).
7	Missionaries & Mormons 1846 (Westward Expansion via Manifest Destiny)	The Church of Jesus Christ of Latter-day Saints was among a number of religious movements that sprang up during the religious awakenings of the 1830s and 1840s. Because of intense persecution, the Mormons moved west to the Great Salt Lake in present-day Utah. Claire viewed this as an event that was important to understand the Oregon Trail.
8	Oregon Trail Simulation 1840s (Westward Expansion via Manifest Destiny)	In the 1830s, Americans began traveling to the Oregon territory to settle. Economic troubles in the East and reports of Oregon's fertile land made the West look attractive. By the 1840s, "Oregon Fever" swept through the Mississippi Valley. Tens of thousands of people made the trip to the Northwest.
9	American Progress (Westward Expansion via Manifest Destiny)	John Gast's painting is an allegory that graphically portrays "American Progress" during the 1800's and shows how different inventions and innovations in transport enabled settlers and pioneers to travel from the Atlantic Ocean in the east to the Pacific Ocean in the west. The Native Americans in the painting seem to nearly flee off of the canvas as a reference to the Indian Removal Act.
10	Interpretive Nature of History (review)	In this lesson, Claire discussed the difference between historical myths. Claire used this to compare two narratives surrounding Westward Expansion. The first argues that Americans in the 1800s wanted more "elbow room" because they were too cramped on the East coast. The second argues that Westward Expansion was deeply influenced by ethnocentric overtones that led to the Trail of Tears and other examples of persecution by non-Christian whites.
11-14	Cattle Drive (Westward Expansion via Manifest Destiny)	Cattle Drives were an extremely lucrative business for many Americans and deeply impacted life on the Great Plains. Additionally, cattle drives and the cowhands who worked on them captured the imagination of America. Ranching eventually began to replace the cattle drives and when the cattle drives fell, another type of economic activity would rise in the Plains – farming.

15-16	Homestead Act (Westward Expansion via Manifest Destiny)	In 1862 the government encouraged settlement on the Plains by passing the Homestead Act. This law gave up to 160 free acres of land to a settler who paid a \$10 filing fee and lived on the land for five years. This policy attracted thousands of new settlers to the Plains. Among these settlers were immigrants, African Americans, and women.
17-18	Texas Independence 1836 (Westward Expansion via Manifest Destiny)	Throughout the 1820s many Americans settled in Texas. They were required to abide by certain rules including converting to Roman Catholicism, learning Spanish, and following Mexican law. Many settlers failed to accept these terms. Disagreements over taxation eventually culminated in the Texan Declaration of Independence. Texas allowed slavery which attracted many new settlers.
19-20	Texas Annexation 1845 (Westward Expansion via Manifest Destiny)	The annexation of Texas by the United States ended the nine-year period of independence which the Republic of Texas had enjoyed. In 1845, the Republic of Texas asked to become a part of the United States, and the government of the United States agreed to annex the nation.
21-25	Education reform, prison reform, & Temperance Movement (Age of Reform from 1820 to the 1860s)	The 1800s saw many reforms throughout society. Horace Mann helped to create the first state-supported normal school where high-school graduates were trained to become teachers. Dorothea Dix helped to improve conditions inside of prisons, while others like Lyman Beecher advocated for temperance.
26-29	Women's Movement (Age of Reform from 1820 to the 1860s)	In 1848 Elizabeth Cady Stanton, Lucretia Mott and others organized the first women's rights convention in Seneca Falls, New York. This convention would be a representative of an ongoing effort to achieve greater equality for women. The convention was not only a cause for reform, but was also the outcome of this ongoing effort.
30-31	Suffrage (Age of Reform from 1820 to the 1860s)	The journey for women's suffrage was a long and arduous one deeply connected to the women's movement that had been dramatically impacted by the Seneca Falls convention. Susan B. Anthony and Elizabeth Cady Stanton led the suffrage movement through the turn of the century. It would not be until 1920, however, that women would gain the right to vote throughout the United States with the

		passage of the 19 <sup>th</sup> Amendment.
32-38	Abolitionism (Age of Reform from 1820 to the 1860s)	Abolitionists realized that the gradual approach to ending slavery had failed. Some wrote newspapers, published books, risked prison, and even death by helping African Americans escape from the South to the North on the Underground Railroad.
39	Age of Reform Review (Age of Reform from 1820 to the 1860s)	The Temperance movement, education reform, prison reform, the Women's movement, and abolitionism were all reviewed.
40-46	Bleeding Kansas (Westward Expansion via Manifest Destiny)	Bleeding Kansas is the term used to describe the period of violence during the settling of the Kansas territory. Popular sovereignty would determine whether the area became a free state or a slave state. Proslavery and free-state settlers flooded into Kansas in attempts to influence the decision. Violence soon erupted as both factions fought for control. Abolitionist John Brown led anti-slavery fighters in Kansas before his famed raid on Harpers Ferry.

Appendix E

Primary Source Analysis Sheet



Appendix F

Lovorn's Historical Thinking and Historiography Project

### Historical Thinking and Historiography Report Project

The purpose of this semester-long project is to allow each of you to work independently and collaboratively to explore and practice historical thinking skills and engage in historiography so as to enrich your approaches to social studies content, and better prepare you (individually and collectively) to teach middle/high school history in a more enriching, engaging manner. Early in the semester, we will read and discuss several seminal works on historical thinking and historiography (the study of history). We will engage in theoretical discourses on these concepts, focusing specifically on practical applications in the secondary history/social studies classroom, advantages and challenges to teaching with these strategies, ways of implementing more historical thinking and historiography within the confines of the established curriculum, and expectations for preservice teachers.

After critical discourse on historiographic analysis and evaluation, preservice teachers will accompany me on a historiography field trip, where, as a group, we will visit and study a site of regional historical significance that encompasses certain historical perplexities and has been the subject of some debate in recent years. While there, we will hear conflicting histories about the site and engage in a group analysis of the existing commemoration.

Upon our return, you will use what you learn from the readings and the field trip to conduct your own historiographic analysis. You will select a similar local/regional historical era, event, individual, or group related to **20<sup>th</sup>-century race relations in the Deep South or the American Civil Rights Movement** that is commemorated with recognized sites, landmarks, roadside markers, or similar. Then, you will follow James W. Loewen's approach for critiquing the historical presentation and commemoration. In essence, your primary focus will not be on the historical era, event, individual, or group, but rather the way information is commemorated (or not) and presented (or not).

This project will culminate with a Historiography Festival at the end of the semester, during which each of you will present a historiography report and introduce a related, original lesson or mini unit (see below). Remember, historiography is the study of history. **Your report** should include a paper (approximately 2,500 words) and accompanying visual display that addresses each of the following components:

1. a critical discussion of the historical presentation,
2. the accuracy of the commemoration,
3. the agenda of the agencies responsible for placing the commemoration,
4. the "take-home" message (your opinion), and
5. how students might perceive the display/history.

**Your lesson plan** should be crafted with specific attention to engaging students in historical thinking about your topic and should comprise at least three of the five historical thinking benchmarks identified by the National Center for History in the Schools: 1) chronological thinking, 2) comprehension, 3) analysis and interpretation, 4) research capabilities, and 5) issue-analysis and decision-making.