

“I No Longer Teach History, I Teach S.O.Ls:” Navigating the Curricular and Instructional Minefield of a High-Stakes Educational Environment.

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ABSTRACT

Over the last several decades, the field of education has seen the introduction and normalization of high-stakes standardized testing as part of the educational routine. With this introduction, questions concerning how these standardized tests have altered the educational landscape for teachers remain. “Teaching to the test” has become a household phrase, one that can have both positive and negative undertones.

To better understand how teachers negotiate the influences over their curricular and instructional decisions requires the studying of both their planning and implementation processes as well as how they interact with the official curriculum. Guiding this investigation are two comprehensive questions. How does a veteran teacher’s understanding of historical significance impact how they ascribe value to the purpose, nature and utility of history as a school discipline over time and space? How tightly aligned are a veteran teacher’s conceptions and perceptions of the purpose, nature and utility of history as a school subject with their observed pedagogical practices? This study sought to investigate the various influences over a teachers’ curricular and instructional decision-making by building on previous research. Through interviews, surveys, classroom observations, and collecting documents, I was able to capture the planning and implementation routines of a veteran teacher. Through these methods, it was discovered that the multitude of influences were much more fluid and intertwined than first thought. This study sheds light on the web of influences teachers have to operate in on a daily basis.

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GENERAL AUDIENCE ABSTRACT

Over the last several decades, the field of education has seen the introduction and normalization of high-stakes standardized testing as part of the educational routine. With this introduction, questions concerning how these standardized tests have altered the educational landscape for teachers remain. “Teaching to the test” has become a household phrase, one that can have both positive and negative undertones.

In an attempt to better understand how teachers determine what is important enough to teach, this study investigates the planning and implementation processes of a veteran teacher. More specifically, this study sought to investigate the various influences over a teachers’ curricular and instructional decision-making by building on previous research. Within a high-stakes testing environment, is it as simple as “teaching to the test?” Through interviews, surveys, classroom observations, and collecting documents, I was able to capture the planning and implementation routines of a veteran teacher. Through these methods, it was discovered that the multitude of influences were much more fluid and intertwined than first thought. This study sheds light on the web of influences teachers have to operate in on a daily basis

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Chapter 1: Introduction

During a passing conversation with a colleague of mine, he expressed his frustrations with the Virginia Standards of Learning. He summed up his frustrations by saying, “I no longer teach history; I teach S.O.Ls¹.” Even though I had been teaching for many years, I had never heard a teacher articulate their frustrations towards our standards-based curriculums so bluntly and succinctly. This brief exchange led me to think much more critically about the role that standards-based curriculums and high-stakes tests have on how teachers determine what is significant enough to teach and how much emphasis and time they give or do not give to what they consider to be of significance. Looking to the literature, Whelan (2006) sums up my colleagues’ frustrations; “Too many social studies teachers seem to see their role as simply ‘teaching’ the curriculum, not ‘defining’ it” (p.41). This led me to the question of whether my colleague was simply “teaching” the curriculum as Whelan (2006) posits, or were the interactions that my colleague had with the standards-based curriculum more multifaceted? Furthermore, this guided me to question my own teaching practices. This conversation sparked my interest in the topic of historical significance and how it is ascribed within an environment where standards-based curriculums and high-stakes testing are the norm.

Determining historical significance is highly subjective, but, as Ceradillo (2006) posits, “Questions of curriculum selection, textbook construction, historical interpretation, the meaning of ‘history’ itself, all hinge on the question of significance” (p. 7). Peck (2010) argues, “Historical significance is the cornerstone of all historical

¹ When this teacher uses the term SOLs, he is referring to the Virginia Standards of Learning.

² Beer (2006) defines “hobby teaching” as, “teachers choosing the curriculum based on

inquiry” (p. 574). If historical significance is the cornerstone, as Peck argues, the processes used to determine significance should be investigated. Although researchers have begun to focus attention on how teachers perceive and incorporate the concept of historical significance into their teaching practices (Barton, 2005; Barton & Levstik, 1998; Cercadillo, 2006; Conway, 2006; Counsell, 2004; Epstein, 1998; Evans, 1988; Grant, 1996; Lee & Coughlin, 2011; Levstik, 2000; Peck, 2010; Terizan & Yeager, 2007; VanSledright, 1997; Wineburg & Monte-Sano, 2008; Yeager, Foster, & Greer, 2002) questions still remain. Very few studies (Grant, 1996; Lee & Coughlin, 2011; Levstik, 2000; Terzian & Yeager, 2007) have specifically focused on the processes and criteria used by teachers when ascribing significance. To this point, Lee (2005) contends, “The substantive history (the ‘content’ of the curriculum) that students are required to study is important, and so there will always be arguments about what is to be included, what should be omitted, and whether there is too much to cover” (p.40). Seixas (1997) argues, “students are most typically taught ‘the history’ and left to make sense of it themselves. Not surprisingly, they follow different routes towards the construction of historical significance” (p. 27). This got me to think about how teachers make sense of “the history” themselves. Do the teachers, like students, take prescribed curriculums at face value with little to no critical thinking about what to include or exclude? Are teachers just the disseminators of curriculum between policy makers and students?

Although not fully investigated, some researchers have found that teachers greatly influence how students view, ascribe, and analyze significance (Evans, 1988; Grant, 1996; Lee & Coughlin, 2011; Levstik, 2000; Terzian & Yeager, 2007). As with students, there may be a multitude of influences that impact teachers and their decision-making processes’ when it comes to curriculum selection. Grant (1996) contends,

“Acknowledging what teachers define as the influences on their decisions and that those influences are likely to interact should help us better understand why teachers make the instructional decisions they do and why changes in teachers’ practice can seem so uneven, unpredictable, and slow” (p. 238). A teacher’s background and interests can influence the selection of curriculum, as well as local, state, and national standards (Grant, 2007). Even though Grant (2007) notes that, “At a minimum, teachers choose curriculum, they design instructional activities, and they create assessments” (p.250), he does recognize “No one teaches in a vacuum; influences of all sorts are ever-present in the ways that teachers plan, enact, and assess their lessons” (p.253). Additionally, Grant (1996, 2007) acknowledges that the degree to which each interactional relationship influences teachers varies; the only constant is that teachers are influenced by many different factors.

Statement of the Problem

At a time when some researchers are very interested in understanding not only how students ascribe significance, but also what they deem as historically significant (Barton, 2005; Barton & Levstik, 1998; Epstein, 1998; Peck, 2010; Terzian & Yeager, 2007; Seixas, 1994; VanSledright, 1997; Yeager, Foster, & Greer, 2002), there is a gap in the literature with regards to teachers’ ascription and conception of historical significance, especially in the context of high stakes environments. This study aims to add to the limited research concerning the processes through which a teacher ascribes historical significance in a history classroom over time and space and subsequently how their conceptions and perceptions around the nature, value, and utility of history education align with their observed pedagogical practices. Additionally, this study aims

to gain a better understanding of how teachers conceptualize and ascribe historical significance within the classroom.

Over the years, there has been an interest in educational studies with regards to what students view as being historically significant (Avarogullari & Kolcu, 2016; Barton, 2005; Barton & Levstik, 1998; Cercadillo, 2006; Conway, 2006; Epstein, 1998; Evans, 1988; Levstik, 2000; Terizan & Yeager, 2007; VanSledright, 1997; Wineburg & Montecano, 2008; Yeager, Foster, & Greer, 2002). However, one key component that is often missing from these studies is in-depth examinations of the role that teachers play in this process. In order to better understand how students ascribe significance, there needs to be a better understanding of how teachers not only ascribe significance in their personal lives, but how they negotiate their own beliefs with that of an official curriculum in a high-stakes testing environment. My goal for this research is to add to the limited literature with regards to teachers through the lens of *teacher as gatekeeper* within different context. When we better understand the curricular and instructional decision-making of teachers, it may help to shed more light on how students conceptualize and ascribe historical significance.

Research Question

My goal for this research is to add to the literature with regards to teachers' ascription of significance in their planning and implementation of instruction in the history classroom through the lens of *teacher as gatekeeper*. In an educational climate where standards-based curriculums as well as high-stakes testing are the norm, the overarching question that guides my research is: How does a veteran teacher determine what is historically significant enough to teach in a high stakes environment? From this overarching question come two supporting questions that drive my research:

1. How does a veteran teacher's understanding of historical significance impact how they ascribe value to the purpose, nature and utility of history as a school discipline over time and space?
2. How tightly aligned are a veteran teacher's conceptions and perceptions of the purpose, nature and utility of history as a school subject with their observed pedagogical practices?

In order to begin to answer the research questions this study seeks to trace the factors and influences that shape the curricular and instructional decision-making of a veteran teacher carrying out instruction over the course of one unit for his 11th grade U.S. History class. Pulling from the theoretical frameworks of *teacher as gatekeeper* and *historical significance* this study looks to trace through and illuminate how various factors, personal, policy, and organizational—interact and begin to shape his curricular and instructional decision-making.

Chapter Two provides a brief review of current literature on the nature of historical knowledge and inquiry, historical significance, and influences affecting teachers' curricular and instructional decisions. Although these topics may seem loosely related, I contend that they all operate simultaneously, making it difficult to examine them independently.

In Chapter Three, I outline the methodology used to collect and analyze data as well as the rationale for conducting case-study research. Additionally, I explain the purpose for including typological analysis as my main method of analysis. In order to better engage with the research questions, the theoretical frameworks of *teacher as gatekeeper* and *historical significance* are also introduced within this chapter.

Chapter Four details the findings and specifically the complexities and interconnectedness of influences shaping the participants curricular decision making are described and unpacked.

Chapter Five provides a discussion of the findings as well as explores future avenues for research. In addition, I discuss how the findings from this case are of value for informing my own future practices as a teacher and teacher leaders as well as teacher educators.

Chapter 2: Review of the Literature

Standardized curriculums, with high-stakes tests, have altered the landscape of the American educational system (Au, 2009; DeWitt, et.al, 2013; Grant and Salinas, 2008; Hong and Hamot, 2015; Lisanti, 2015; McNeil, 2000). Even though there has not been a dramatic change in the ways through which historical content is delivered, the authority over what to teach has shifted from the classroom to boards of “experts” (DeWitt, et.al, 2013). Beer (2006) argues that teachers are no longer involved with the “what” in reference to the curriculum; rather, they are now focused on the “how,” referring to instructional practices (p. 4). In these high-stakes testing environments, teachers who still engage in “hobby teaching²” run the risk of being exposed through their student test scores. Many of the curriculum decisions that were once made in the classroom are now being handed down from higher authorities through the incorporation of state standards and end-of-course tests (Fickel, 2006; Grant, 1996, 2007; McNeil, 2000; Segall, 2003, 2006; van Hover, 2006; Winkler, 2002). In an educational climate where standards-based curriculums as well as high-stakes testing are the norm, how do the various interactional relationships impact the curricular and instructional decisions made by teachers³?

In an attempt to better understand this question, this chapter will explore current literature on the nature of historical knowledge and inquiry, theoretical conceptions of

² Beer (2006) defines “hobby teaching” as, “teachers choosing the curriculum based on their favorite topics” (p. 4).

³ For this paper, the terms “curricular decisions” and “instructional decisions” will be defined as by Shaver (1979). He defines “curricular decisions” as, “decisions about appropriate teaching goals and the experiences to reach them” (Shaver, 1979, 21). “Instructional decisions” is defined as, “those about how to teach within some implicit or explicit curricular frame” (Shaver, 1979, 21).

historical significance, and empirical studies investigating how historical significance is being conceptualized and ascribed in educational settings. Lastly, this chapter will conclude by exploring the literature on curricular-instructional gatekeeping as a theoretical/conceptual framework, that run alongside the theoretical framework of historical significance, for examining influences over teachers' curricular and instructional decision-making.

The Nature of Historical Knowledge and Inquiry

History is much more than just a series of events. History involves narrative, but narratives do not create themselves. Historical skills such as interpretation, synthesis, and analysis should be included in any definition of history (Lee, 2005). It is historical narratives that have been the mainstay in the American educational system for close to a century (Thornton, 1997). However, due to the interpretative nature of history, the question of “what is history?” in terms of its definition and purpose (in schools) remains a point of controversy and contention (Barton and Levstik, 2004; Epstein, 2009; Evans, 2010; Kaltsounis, 1994; Ravitch, 2001; Timmins, et al., 2005).

In understanding the academic discipline of history, Carr (1961) is helpful. He argues, “History consists of a corpus of ascertained facts. The facts are available to the historian in documents, inscriptions, and so on, like fish on the fishmonger’s slab. The historian collects them, takes them home, and cooks and serves them in whatever style appeals to him” (p. 6). From the start, Carr (1961) addresses the interpretative nature of history: he recognizes history is an inferential discipline. Although historical facts may be innocuous in nature, it is the historian who breathes life into them. It is through historical sorting, sifting, and setting aside that historians bring historical facts into the social consciousness of the population. Furthermore, historians can only sort, sift, and set aside

what is there meaning there is a natural selection process even before the historian gets a chance to analyze the information. Not all stories will be told, not because they are deemed insignificant but due simply to the fact that those stories have not survived to the present day. Such a foundational understanding regarding the inferential nature of the academic discipline does not simply belong in history lecture halls in colleges and universities but should be of concern and importance for those who teach and learn history in our primary and secondary schools (Bradshaw, 2006; Hunt, 2000; Phillips, 2002; Whelan, 2006). How we come to implicitly think about history in terms of its definition, purpose, and place in the curriculum shapes *how* it is taught and also *what* is taught.

The study of history has the ability to open a window for students to evaluate, analyze, and interpret decisions of the past. Students can then study the consequences of those decisions in the present to determine the long-term effects (Barton and Levstik, 2004). History is not only a lens to the past, but also a lens to the present and future. Much of the complexity surrounding the study of history is centered on the issue of determining what is historically significant enough to include in the official curriculum. It is understandable that choices must be made and historical events must be simplified or abandoned. To this end, it is reasonable to state that this process occurs at all levels, from historians to teachers (Barton and Levstik, 2004). Although each level has varying degrees of autonomy concerning historical significance, there is still a hierarchy present.

As an academic and school based discipline history is ideally represented as an inferential and inquiry based discipline that is at a minimum shaped by first-order narrative ideas and knowledge; and, second-order conceptual ideas and knowledge

(Lévesque, 2005; VanSledright and Limón, 2006). Sandahl (2015) argues that, “first-order concepts are all the facts, terms and concepts found in history as an academic discipline” (p.24). In essence, first-order concepts represent the individual building blocks of historical inquiry, while second-order concepts represent the blueprints of historical inquiry. First-order knowledge is closely aligned with specific facts, focusing on selected events and people to be memorized verbatim (Lévesque, 2005). The value of first-order concepts should not be lost or diminished. First-order concepts help to construct the foundation from which a deeper analytical understanding can be reached (Lévesque, 2005). Metzger (2010) argues, “Without structure, students can find themselves awash in a tide of isolated, confusing pieces of information. It can be difficult to tell what information is connected to what themes, or what themes are connected to what explanations about why the past happened the way it did” (p. 346).

Second-order concepts use the foundation constructed by the collection of first-order knowledge, thus allowing a person to engage in historical inquiry. Sandahl (2015) defines second-order concepts as, “disciplinary and procedural tools that help historians organize, analyze, interpret and critically review history” (p. 21). When discussing second order concepts, Sandahl (2015) goes on to explain, “these concepts are intertwined with factual knowledge—you cannot analyze without a deep foundation of factual knowledge” (p. 21). Similarly, Lee (2005) posits that second-order knowledge denotes, “a layer of knowledge that lies behind the production of the actual content or substance of history” (p. 32). Although some rote memorization will be present in the construction of background knowledge, there is a greater focus on causation, perspective, and historical significance. Second-order concepts equate to higher level thinking skills, skills that must be taught. The incorporation of second-order concepts gives meaning,

purpose, and justification to first-order concepts, essentially being the adhesive holding together the historical narrative.

As part of the generative discussion regarding the nature of historical knowledge, VanSledright (2008) contends that historical knowledge may be conceptualized into three interconnected types: “foreground substantive knowledge, background substantive knowledge, and procedural or strategic knowledge.” Instead of just focusing on first-order and second-order concepts, VanSledright (2008) adds a third category. According to VanSledright (2008), foreground substantive knowledge is most closely aligned with first-order concepts; much of this knowledge can be acquired through the use of textbooks. This type of knowledge includes a general understanding of what has occurred in the past with little to no critical analysis. To help the learner gain a deeper understanding of history, background substantive knowledge must be constructed.

Similar to second-order concepts, background substantive knowledge aims to focus on concepts of causation and historical significance to allow the learner to construct a deeper understanding of historical inquiry. VanSledright (2008) argues that background substantive knowledge deals with “historical significance, causation, change over time, chronological sweep, evidence, and historical conceptualization.” Background substantive knowledge seeks to address a deeper understanding and analysis of history, using foreground substantive understandings as a foundation.

It is at this point where VanSledright (2008) adds a third type of knowledge to historical inquiry: procedural or strategic knowledge. Through the construction of procedural or strategic knowledge the learner will be able not only to critically evaluate history, but to construct history as well. It is during this third stage where the learner begins to construct historical questions as well as evaluate sources. In other words,

procedural or strategic knowledge represents the process of ascribing historical significance. It is through this process of ascribing significance that procedural or strategic knowledge allows for the construction of foreground substantive knowledge, starting the cycle all over again (See Figure 1).

Figure 1. A visual representation of historical inquiry – VanSledright (2008)



VanSledright's (2008) historical inquiry model, although insightful, may be too broad for immediate implementation within an educational setting. Rather, his model maps out the stages of historical inquiry to which teachers should aspire students to reach. Attempting to provide tools for teachers to incorporate historical inquiry into classrooms, the College, Career, and Civic Life (C3) Framework for Social Studies State Standards was created (Herczog, 2013, 331). The C3 Framework, developed through the National Council for the Social Studies (NCSS), attempts to develop a pragmatic approach by focusing on an inquiry arc. Herczog (2013) defines an inquiry arc as, "a set of interlocking and mutually supportive ideas that frame the way students learn social studies content" (p. 331). There are four dimensions incorporated into the C3 Framework inquiry arc. Those dimensions are: develop questions and plan investigations; apply disciplinary concepts and tools; gather, evaluate, and use evidence; and communicate

conclusions and take informed action (Grant, 2013, pg. xvii; Grant, Swan, & Lee, 2017, pg. 23). In essence, the C3 Framework attempts to focus on an inquiry-based approach to the social studies, as opposed to a rote-memorization based approach. Instead of constructing a prescribed list of historical events, dates, and people to be disseminated to teachers and students, the C3 Framework focuses on transferable skills to promote deeper learning and understanding (Grant, Swan, & Lee, 2017).

Compelling questions and supporting questions lie at the heart of the inquiry arc. Grant (2013) argues, “Curiosity drives interest and interest drives knowledge, understanding, and engagement” (p. xvii). It is argued that by incorporating this inquiry arc, students will be compelled to engage in historical inquiry through constructing and then answering questions as opposed to rote memorization and recitation. The intention is to create a process that could be implemented nation-wide while at the same time allowing for state and local officials to determine the specific curricular content (Swan & Griffin, 2013). The construction and implementation of the C3 Framework represents a greater focus on higher order historical inquiry in the educational community. Similar to first-order and second-order concepts, as well as VanSledright’s (2008) historical inquiry model, the C3 inquiry arc seeks to make explicit the incorporation of historical inquiry into the social studies classroom. However, unlike the other models, the C3 inquiry arc creates a more practical and pragmatic approach to achieve the goal of incorporating historical inquiry.

Conceptualizing and Ascribing Historical Significance

Unpacking historical significance. Seixas (1994) defines historical significance as: “the valuing criterion through which the historian assess which pieces of the entire possible corpus of the past can fit together into a meaningful and coherent story that is

worthwhile” (p.281). Levesque (2009) argues, “Significance is determined by the valuing criteria through which politicians, diplomats, scholars, and even the defenders of human rights covenants assess which event, conflict, or war was worth considering and ultimately worth intervening in to restore human rights” (p.41). Similar to Seixas’ (1994) definition, Levesque (2009) focuses on the concept of “valuing criteria” when defining “historical significance.” However, Seixas (1994) and Levesque (2009) may be oversimplifying the process of “valuing criteria” when ascribing historical significance. Lee and Coughlin (2011) warn, “History is inherently interpretive, and there is no list of criteria to determine whether or not an event is significant” (p. 44). To this point, Levesque (2005) also admits that, “To this day, it is not entirely clear, even within the history community, what criteria are accepted as valid for determining historical significance” (p.3). So even though “valuing criteria” lies at the heart of ascribing historical significance, it appears that determining universal criteria may be a difficult task.

Using Seixas’ definition as a theoretical foundation, Lomas (1990) and Bradshaw (2006) add to the conversation by constructing declarative statements with regards to historical significance in order to conceptualize this concept. Lomas (1990) posits:

1. History operates on the basis that some things are more important than other things.
2. Assigning significance to something involves a subjective judgment.
3. Some things can be more significant at times than at other times.
4. It is important to work out criteria for assigning significance.

5. It is possible for there to be different selections of significant facts about the same event or situations and all of them can be equally valid. There is no one unquestionable set of significant and true facts about a situation or event
6. Something becomes significant largely because it has a relationship to other things (p. 41).

Bradshaw (2006) adds to the discussion by constructing two tenets concerning historical significance:

1. Historical significance is not the property of the event itself. It is assigned.
2. Historical significance is contested not decided. It is debatable in which they can make a genuine contribution of their own (p. 24).

The takeaway from both Lomas (1990) and Bradshaw (2006) is that historical significance is neither entirely objective nor universal. The concept can be applied similarly, yet yield different outcomes. It is through the conceptualization of historical significance where the need to understand the criteria used to ascribe significance becomes important.

So why is it so difficult to nail down a specific, universal definition for historical significance? In part, it is due to the complexity surrounding the study of history. Counsell (2004) supports this claim by stating, “Historical significance is not the property of the event itself. It is something that others ascribe to that event, development or situation” (p.30). In other words, the process of ascribing significance is just that, a process. A person, place, or event is not historically significant simply because it existed, historical significance is assigned by people who deem a person, place, or event as being significant. Therefore, when studying historical significance, it is just as important to

study the criteria for ascribing significance as to study what has been ascribed as historically significant.

From Theory to Practice to Research: Implementing Historical Significance in the Classroom

Ascribing models of historical significance in/for the classroom. Barton (2005) argues, “Conceptions of significance are at the heart of all history—and history education” (p.9). But what does this mean and how does it present itself in a history classroom? There is an overabundance of history out there, so much that it would be impossible to cover it all. Seixas (1994) posits, “Studying everything is impossible” (p. 281), therefore historical content needs to be narrowed down and simplified (Lee, 2005, 40). However, the process of narrowing down historical information needs to be examined to better understand the reasons for some things to be included, while other things are excluded. Debates have been waged over the years regarding the very issue of what is significant enough to include in the annals of history (Lee and Coughlin, 2011, 449). Barton & Levstik (2004) argue, “Everyone make these choices—historians, textbook publishers, school boards, and teachers—because no one can cover everything that happened in the past or use all possible teaching methods. Moreover, there is not a ‘neutral’ or ‘objective’ approach to history that can guide such choices; they can be guided only by the goals we develop for the subjects” (p. 27). Even though the process of ascribing historical significance is a very subjective endeavor, articulating sets of criteria for this ascription can help pull the curtain back a bit, bringing the process out of the shadows and into the light.

Lomas (1990) argues in his pamphlet titled *Teaching and Assessing Historical Understanding*, “history, to be meaningful, depends on selection and this, in turn,

depends on establishing criteria of significance to select the more relevant and to dismiss less relevant” (p. 41). The cornerstone for the study of criteria with regards to ascribing historical significance is the work of Partington (1980). In an attempt to reflect on his own experiences as well as scholarly research, Partington (1980) sought to explore the topic of history and historical understanding. It was through this work that he constructed a model to guide teachers and students through the process of ascribing significance. Partington (1980) developed five criteria for historical significance to help justify the inclusion and exclusion of historical events and people. These five indicators were importance, profundity, quantity, durability, and relevance (See Figure 2).

Figure 2. Partington’s criteria for significance (1980, 112-116)

Importance	What was important to the people who lived during the time period in question?
Profundity	Were there major changes in human life?
Quantity	How many people did the event or the person affect?
Durability	Is the legacy of the event or person felt over a long period of time?
Relevance	Is the event or person relevant in the contemporary world?

By incorporating these criteria into their daily practices, Partington (1980) believes that teachers can justify historical selections included in their syllabi. However, the criteria listed above can still lead students and teachers to different conclusions about what should or should not be considered historically significant. However, just implementing a set of criteria to ascribe historical significance does not create a universal set of historically significant people, places, or events. Rather, the purpose of implementing a set of criteria is to help justify historical selection and the process of ascribing historical significance.

To this day, Partington’s (1980) criteria have continued to influence the field of education. In fact, Partington’s criteria have been the model for other educational researchers in their quest to develop student-friendly approaches to ascribing significance (Bradshaw, 2006; Counsell, 2004; Phillips, 2002). Applying Partington’s (1980) criteria for significance to the study of World War I, Phillips (2002) constructed a model to use with his students. Using the term “Great,” Phillips (2002) constructed criteria to be used to answer, “Why was the First World War called the Great War?” Through the process of answering the main question as well as using the criteria given, students were taught the process of ascribing significance. In essence, Phillips (2002) was helping to understand second order concepts and to work towards what VanSledright (2008) referred to as procedural or strategic knowledge. Phillips (2002) found that by focusing on significance, history appeared to have become more relevant and meaningful to the students because they had to justify the inclusion and exclusion of historical facts (See Figure 3).

Figure 3. Phillips criteria for significance (2002, 16)

G	Groundbreaking
R	Remembered by all
E	Events that were far reaching
A	Affected the future
T	Terrifying

Furthermore, through the use of this set of criteria, students not only had identify historically significant events, they had the opportunity to ascribe significance.

Phillips (2002) helps to take Partington’s (1980) model for criteria, arguably constructed for the benefit of educators, and make it something that was more student-friendly. Expanding upon the works of Partington (1980) and Phillips (2002), Counsell

(2004) seeks to add to the literature by constructing criteria based on her own understanding of historical significance (See Figure 4). She argues that students need to have opportunities to question why certain things end up being preserved in the annals of time while others are not. Additionally, she argues that simply understanding consequences does not equate to understanding historical significance; that historical significance is multi-faceted.

Figure 4. Counsell’s five “R”s criteria for significance (2004, 32)

Remarkable	“The event/development was remarked up by people at the time and/or since”
Remembered	“The event/development was important at some stage in history within the collective memory of a group or groups”
Resonant	“People like to make analogies with it; it is possible to connect with experiences, beliefs or situations across time and space”
Resulting in Change	“It had consequences for the future”
Revealing	“Of some other aspect of the past”

Counsell (2004) recognizes that similar to previous models, her model is not perfect; that some “R”s are going to be more meaningful than others depending on the topic. Even so, Counsell (2004) views the Five “R” model as another resource for teachers to use when students are given the opportunity to actively engage in the process of ascribing historical significance.

Even though there is not one universal set of criteria for determining significance, the very presence and use of any type of criteria helps to incorporate more second-order concepts into the classroom as well as helping students achieve procedural or strategic knowledge. Making students and teachers justify historical selections using criteria moves beyond the rote memorization most often associated with first-order concepts, forcing students and teachers to make deeper connections. Furthermore, using VanSledright’s (2008) model of historical inquiry, incorporating criterion for justifying

significance will help students and teachers obtain procedural/strategic knowledge, thus allowing not only for the justification, but the ascription of historical significance.

Ascribing Significance: Empirical Research in the Classroom

What becomes clear from the literature on the nature and models on historical significance is that historical events and people are not inherently significant; rather, significance is applied to them through the application of criteria (Barton, 2005; Bradshaw, 2006; Counsell, 2004; Lomas, 1990). Thus, what may be significant to one person may not be significant to another (Barton, 2005). After sifting through the empirical research on historical significance of both students and teachers, three major themes emerged within and across studies with regards to how research participants made sense of both historical content and historical significance. The themes are relevance, vernacular vs. official histories, and unity and progress. Throughout the research, these themes appeared as the most frequent explanations for historical selection. Thus, it can be assumed from the nature of these studies that these themes will also influence the process of ascribing historical significance.

Relevance. Multiple studies noted that when students and teachers were ascribing significance they were using relevance to their own lives as a criterion (Barton, 2005; Barton & Levstik, 1998; Epstein, 1998; Levstik, 2000; Peck, 2010; Seixas, 1994; Wineburg & Monte-Sano, 2008; Yeager, Foster, & Greer, 2002). Some judged historical events as being significant due to the personal connections they had with those situations and their families (Seixas, 1994). For example, Epstein (1998) found that African-American students and European-American students had different conceptions of the same historical events and people. The experiences of the students in Epstein's (1998) study profoundly influenced their perceptions of historical significance. Even when

students chose the same people or events to be historically significant, the reasons for their choices differed. For example, Martin Luther King, Jr. appeared frequently on both European-American and African-American lists. However, when explaining the reasoning's behind their selections, there was a divergence in responses. A majority of African-American students made explicit mention of King's contributions to African-American equality. In contrast, a majority of European-American students attributed their selection of King to his "I have a Dream" speech (Epstein, 1998, p. 404). This example helps to illustrate the role that relevance has in ascribing historical significance. Additionally, it helps to demonstrate that the concept of relevance is not universal to all people, thus influencing people differently.

Vernacular and official histories. Ongoing research also suggest that groups that have been historically marginalized tended to infuse vernacular histories into their own personal narratives and that these carry a great deal more relevance and significance to them than the official histories taught in schools (Epstein, 1998; Levstik, 2000). Barton & Levstik ((1998) conceptualize the term vernacular histories by writing, "Unlike official histories based on the 'imagined communities of a large nation,' vernacular history is derived from lived experience in specific and generally small-scale communities" (p. 491). Family, friends, and personal interest of the students often nurture these vernacular histories.

When studying the process for how students ascribe significance in Northern Ireland, Barton (2005) found that due to a weak official history, the role of vernacular histories became that much more influential and important. Due to the contested political history between Catholics and Protestants in Northern Ireland, vernacular histories learned in their communities typically are not reinforced in the schools (Barton, 2005, p.

32). How students interpret history in Northern Ireland is heavily influenced by the vernacular histories they receive in their communities. When attempting to understand the justifications for ascribing historical significance, the role that official histories and vernacular histories play should not be undervalued (Barton, 2005; Barton & Levstik, 1998; Epstein, 1998; Evans, 1988; Levstik, 2000; Terzian & Yeager, 2007; Wineburg & Monte-Sano, 2008; Yeager, Foster, & Greer, 2002). Although teachers were not included in many of these studies, the findings help to illustrate the process of reconciling both vernacular and official histories in the classroom. Additionally, it can be assumed that teachers also have to reconcile vernacular and official histories within their classroom.

Unity and progress. The third major theme extrapolated from the literature with regards to ascribing significance was that of unity and progress. Terzian & Yeager (2007) commented that the concepts of freedom and unity drove student responses concerning historical significance in their study (p. 52). In this study, Cuban-American students enrolled in an AP United States history course, as well as their teacher, participated in research regarding how cultural experiences and identities influenced historical interpretations. The questionnaire asked students to identify the ten most significant events in American history in ranked order. Students were asked to do the same thing with people as well as rank the five most important documents in United States history. Terzian & Yeager (2007) found themes of national unity were common justifications in the selection process of both the students and the teacher. In fact, both the teacher and the students tended to justify the study of history as a means to appreciate various liberties stowed upon them.

Regardless of their ethnicity, some researchers noted that students in the United States explicitly incorporated the pronouns “we” and “our” when discussing historically

significant events, typically with regards to founding events of the United States (Barton & Levstik, 1998; Levstik, 2000). Supporting this claim was evidence obtained by Barton & Levstik (1998) and Epstein (1998) in which students of all ethnic backgrounds regarded the Bill of Rights as the foundation for American freedom. It was viewed as an example of American exceptionalism, something that makes the United States different from other countries (Barton & Levstik, 1998). Students had a tendency to deem historical events that contributed to an overall sense of nationalism as being significant (Barton & Levstik, 1998; Epstein, 1998). The use of the pronouns “us” and “we” in student explanations may be an indicator of a strong national narrative. Lévesque (2009) contends, “It can also be argued, from recent research findings, that without a defensible conceptualization of historical significance, students and teachers find it becomes extremely problematic to articulate their own conception of the collective past and develop more sophisticated historical understandings of it” (p. 61).

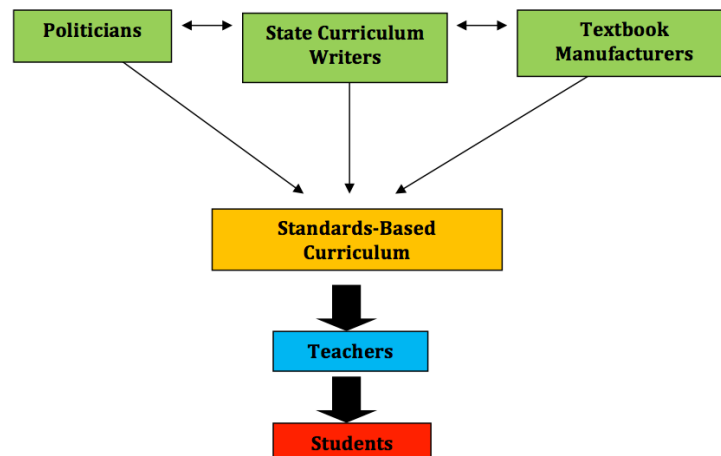
Without knowing whether teachers consciously engage in conceptualizing and ascribing historical significance, understanding the processes through which teachers negotiate curricular and instructional influences may shed light on this area of research. By focusing on the question of “What is important enough to teach,” researchers may be able to reverse engineer the processes teachers use to conceptualize and ascribe historical significance. Additionally, it is important to note that there are many influences involved in this process and they affect teachers differently and to different degrees.

Negotiating Influences

Determining what to teach. Every day teachers must determine not only what information they will present to students, but also how they will present it and how much attention will be given to each topic. Barton & Levstik (2004) argue, “We can’t teach

everything that happened in the past, nor can we treat every purpose equally” (p. 26). In essence, the entirety of the content must be narrowed down to fit the time constraints of the school year. This is partially accomplished through standardization, various parties sifting through the histories to determine what is important enough to test. However, teachers have the ability to emphasize or deemphasize various aspects of the official curriculums (Grant, 2003, 2007; Thornton, 1989, 1991, 2005). Through this process of selection, many influences exist that factor into the process of content selection. Teachers may be influenced by their personal interest, course curriculum guidelines, state guidelines, school guidelines, and time constraints. Very often, portions of the aforementioned influences guide teachers in their curricular instructional decision-making. Grant (2007) argues, " negotiating among competing influences is a persistent and ongoing dilemma for all teachers" (p.251). Additionally, due to the sheer amount of information to choose from, some form of simplification and reduction must occur (Barton & Levstik, 2004, 26). In essence, even though there are a variety of influences affecting decision-making, teachers act as the final gatekeepers of information for students (Grant, 2003, 2007; Pace, 2011; Thornton, 1989, 1991, 2005) (See Figure 5).

Figure 5. Hierarchy of curricular gatekeeping



Teacher as curricular gatekeeper. Thornton (1991) argues, "gatekeeping encompasses the decisions teachers make about curriculum and instruction and the criteria they use to make those decisions" (p.237). To this point, Pace (2011) suggests, "teachers provide students access to particular educational experiences through the choices they make about content and methods" (p. 34). In essence, gatekeeping explores the various factors that influence teachers' decisions about curriculum and implementation of said curriculum. Teacher as curricular gatekeeper can be seen as a metaphor that recognizes the power of teacher as a decision maker and goes to the idea of teacher knowledge. Thornton (1989) exemplifies gatekeeping by stating, "Before, during and after instruction, teachers must act on gatekeeping questions: 'Should I use a worksheet or a writing assignment as the culminating activity in the South America unit?' 'Will my students be able to interpret this map of the Oregon Trail if I don't first review scale and legend?' 'Should I ignore Jill's curiosity about the circumstances surrounding Lincoln's assassination so that I can introduce the unit on Reconstruction.' 'Did the students' poor responses to the homework assignment mean that I should go over the material again in class tomorrow?'"(p.6) Teachers have to sift through the available information and determine what is of most value to their students in their course. Although gatekeeping is not an entirely autonomous endeavor, teachers have a lot of autonomy as to their individual decision-making. Even in an environment where high stakes standardized testing is present, teachers are still required to make day-to-day decisions that will influence their curricular and instructional choices. Aside from their own personal views, other influences will impact the process of gatekeeping. Influences such as textbooks, ancillary materials, state and local standards, and high-stakes end of course tests have the potential to affect the decisions being made on a day-to-day basis by

teachers. Because there is a multitude of outside influences impacting curricular and instructional decision making, teachers act as the final ‘gatekeeper’ in the classroom (Grant, 2003, 2007).

Grant (1996, 2003, 2007) suggests that these influences can be organized around three major categories: personal factors, policy factors, and organizational influences.

Although it is argued that all three categories have the potential to influence curricular-instructional gatekeeping, the extent of influence varies on a case-by-case basis. Grant

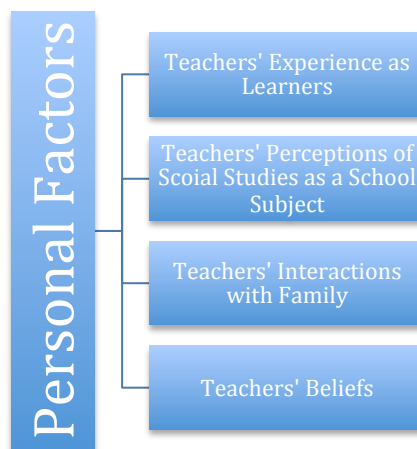
(2003) argues, “Determining what counts as an influence and how much authority it has is difficult” (p. 151). Furthermore, it can be argued (Grant, 2003) that the various

influences do not operate independently of one another. In fact, it is much more likely that they operate simultaneously, shifting between the roles of active and passive factors.

Due to this reality, the type of influence and the degree to which it impacts curricular and instructional decision-making is not predictable or generalizable to all teachers.

However, for the purpose of this literature review, I will create an overview of each of the three main categories that Grant (1996, 2003, 2007) puts forth (See Figure 6).

Figure 6. Personal factors—(Grant, 1996, 2003, 2007)



Personal factors. Every teacher brings his or her own interests, history, and experiences to the classroom. Grant (1996, 2003, 2007) posits that these factors will inevitably shape the mental framework of the teacher, thus influencing their curricular-instructional decision-making. Through his research, Grant (1996) concludes that within the realm of personal factors, some common themes are present among his participants. Those themes are teachers' experience as learners, teachers' interaction with family, teachers' perceptions of social studies as a school subject, teachers' interactions with family, and teachers' beliefs. To this point, Lévesque (2005) argues, "Teachers, students, and people in general, no less than historians, confront the study of the past with their own mental framework of historical significance shaped by their particular cultural and linguistic heritage, family practices, popular cultural influence, and last, but not least, school history experience" (p.1-2). It is impossible to separate personal factors from the curricular-instructional decision-making process. It is through our experiences that shape our view of not only the present, but also the past.

While there may be an official curriculum present, the role of personal factors cannot be understated in curricular-instructional decision-making. Evans (1988) posits that teachers' curricular decisions are heavily influenced by their own conceptions of history. While researching teacher and student conceptions of history, Evans (1988) found that teacher conceptions fell into three major categories. These three categories were social activist and reformer, cosmic philosopher, and storyteller. Although each teacher included in this study was teaching American History, how each teacher viewed their purpose influenced their curricular-instructional decision-making.

Social activist and reformer. Evan's (1988) found that the teacher who was classified as social activist and reformer found their purpose for teaching "as part of the

ongoing struggle to improve the human condition which requires this constant press for justice” (p. 208). In essence, a teacher who identifies as a social activist and reformer attempts to help students understand how people have been oppressed over time and how they (the student) can work to overcome injustices in the world. Evans (1988) illustrates this position by quoting his participant: “History gives us insight to solve contemporary problems. It helped us understand our world and lets us see how power relationships have worked. It helps us understand the ways people have been oppressed, and lets us see strategies people have used to change the conditions of their lives” (p.209). This concept of purpose consciously and subconsciously influences decisions made everyday in the classroom.

Cosmic philosopher. The cosmic philosopher views their purpose for teaching history as providing, “a context for understanding our place in the world” (Evans, 1988, 209). The participant in Evans (1988) research was driven by their belief in Baha’i faith. For the participant, his role as a history teacher is to show students the interconnectedness of humanity. In his words, “History is a way of contextualizing oneself in the world. It is a way of sensing others’ experiences, taking me out of myself but teaching me about myself at the same time” (Evans, 1988, 209). For a teacher who ascribes to the purpose of cosmic philosopher, the teaching of history is a mechanism for teaching students that we are all one with the universe and that we are part of the human race.

The Storyteller. Storytellers believe that in order to contextualize the present, one must have a good understanding of the past. Through this lens, everything in history is linked through cause and effect relationships. Furthermore, teachers who are identified as storytellers attempt to link students lives to the content they are learning to make the experience more meaningful and impactful. Evans (1988) notes that for teachers who fall

into the category of storyteller, “The present and future always relates to the past” (p. 210). The role of the storyteller uses historical information to help students better understand contemporary issues.

In all three cases, the teachers involved in Evans (1988) study view their purpose for history education through slightly different personal frames. Through these frames, Evans (1988) observed that the American history curriculum being taught was impacted by the teachers’ personal beliefs about purpose (p. 213). In fact, Evans (1988) notes that, “Each teacher’s goals are shaped, in part, by a conception of history” (p. 213).

Furthermore, Evans (1988) noted that how each teacher conceptualized the purpose of history had a significant influence on curricular-instructional decision-making. The social activist and reformer provided instruction that emphasized solving contemporary problems. The cosmic philosophers focused on studying individuals in history to help students better understand the interconnectedness of humankind. The storyteller focused his instruction around particular themes to weave a story. In each case, Evans (1988) noted that curricular and instructional decision-making was significantly influenced by their conceptions of history.

Similar to Evans (1988), Terzian & Yeager (2007), while researching how Latino students in an urban setting ascribe significance, concluded that the teacher’s curricular-instructional practices were influenced by their own beliefs regarding the purpose for history. Along with the students, who were all enrolled in an A.P. U.S. History course, the teacher of the course was also included in the data collection. Terzian & Yeager (2007) concluded that there were two major factors that influenced the curricular-instructional decision-making of the teacher. The first factor was the A.P. curriculum itself. Much of the instruction aligned with the grand narrative put forth by College

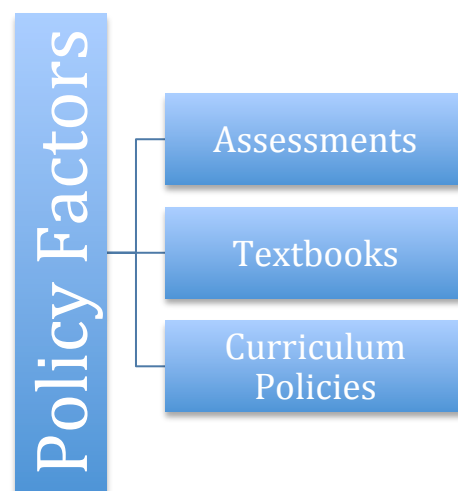
Board. This was not viewed as a surprise since test preparation is often incorporated into A.P. courses. Furthermore, Terizan & Yeager (2007) note, “The documents that Mrs. Hidalgo believed were most historically significant mirrored those that the vast majority of her students cited most frequently because of their foundational importance to U.S. history” (p. 70).

The second factor was the participating teachers’ preference for social history. “It’s not just important people and events . . . It’s also the social aspects of history. If you study a time period . . . you look at everyday people, everything from art, the literature, the social aspect, what they do for leisure time” (Terzian & Yeager, 2007, 70). However, the extent to which the participating teacher’s interest in social history impacted curricular and instructional decision-making may be limited. Terizian & Yeager (2007) note that when responding to questions about historical significance of people and events, responses were not limited to social history (p. 70). Even though the teacher has a preference for social history, Terizian & Yeager (2007) posit that the teacher had a “mandate to conform to the AP schedule and provide students with the facts and skills they needed to pass the exam” (p.72). This research helps to illustrate the point that teachers do not operate in a vacuum; that they may be influenced by many factors when making curricular and instructional decisions. Even though the participating teacher discussed their preference for social history, they could not escape the prescribed curriculum of the course.

Research conducted by Evans (1988) and Terizan & Yeager (2007) highlight aspects of personal factors influencing how teachers justify curricular-instructional decisions in the classroom, thus impacting how students ascribed significance. Evans (1988) discovers how one conceptualizes the purpose for teaching history influences

curriculum and instructional decisions; while, Terizan & Yeager (2007) concludes that although personal factors influence some curricular and instructional decisions, the impact of official curriculums produced by groups such as College Board cannot be understated. However, the extent to which personal factors influence curricular-instructional decision-making will vary on a case-by-case basis (Evans, 1988; Grant, 2003; Terizan & Yeager, 2007).

Figure 7. Policy factors—Grant (1996, 2003, 2007)



High-stakes standardized tests. A major influencing factor that falls into the category of policy factors are high-stakes standardized tests (See Figure 7). To this end, Au (2009) argues, “High-stakes, standardized tests have become ubiquitous in public education in the United States” (p. 43). Before going further into the discussion of high-stakes standardized tests, the terms “high-stakes” and “standardized test” should be defined. Grant (2007) operationalizes the term “high-stakes” by positing, “test scores in these states determine whether or not students graduate from high school” (p. 250). Grant & Salinas (2008) argue that, “Standardized assessment refers to any measure of students’ aptitude and/or ability that is determined by an agency or organization outside

the school” (p.220). For classroom teachers, this very often takes the shape of state constructed, end-of-course tests. Hong & Hamot (2015) posit, “State testing policy has influenced and generally restrained social studies teachers’ classroom planning, practices, evaluation, and decision-making power in carrying out these essential needs” (p. 225). Similar to Hong & Hamot (2015) findings, Au (2009) argues, “the research does suggest that, in many cases, teachers’ instructional practices have been altered by the pressures associated with high-stakes testing. In the classroom this translates into preparing students for tests with pedagogies that focus on rote memorization and lower-order thinking as tests themselves are usually structured to assess breadth of often shallow, fragmented bits of information” (p.46). Interestingly, Grant & Salinas (2008) discovered that, “the content, instructional, and assessment changes teachers make in tested courses do not surface in elective courses” (p. 226). In effect, the findings put forth by Grant & Salinas (2008) supports the notion that in courses where standardized tests are incorporated, the tests themselves influence teachers’ curricular-instructional decision-making.

Even though states that employ high-stakes standardized tests do not tell the teachers how to teach, Grant (2007) argues, “they do suggest what should be taught” (p. 251). In fact, many states have created curriculum frameworks to be used along side of high-stakes standardized tests. Ross (2006) posits, “These curriculum frameworks are intended to influence textbook publishers and establish standards by which students, teachers, and schools will be assessed” (p. 25). Ross’ (2006) statement helps to illustrate the standardization of curriculum choices in states that implement high-stakes standardized testing. While discussing the influence of high-stakes testing on teachers, Hong & Hamlot (2015) maintain, “Research indicates that the influence of state-level

testing policy on social studies teachers' instructional authority shows up in the form of pedantic teaching, such as heavy dependence on textbooks, narrowing of the curriculum, emphasis on generic skills, and use of scripted curriculum for test preparation" (p. 226). While discussing the impact of high-stakes testing on teaching practices, Au (2009) cites a nationwide survey conducted by Abrams, Pedulla, and Madaus (2003). From this survey, it was found that, "76% of the teachers in states with 'high' stakes tests and 63% of the teachers in their study from states with 'low' stakes testing reported that their state testing programs were contributing to unsound educational practices" (p. 46). These findings support the notion that high-stakes tests do, at least in part, influence curricular and instructional decision-making. Furthermore, standardized testing has promoted and reinforced the focus on first-order concepts within the history classroom (Au, 2009; Grant & Gradwell; 2005; Hong & Hamot, 2015; VanSledright, 2002). Due to the way through which items are tested, often multiple-choice questions, first-order concepts are preferred due to the ability to easily and efficiently assess rote knowledge. In response to the implementation of standardized tests, teachers will often mirror their instructional practices to better prepare students for the high-stakes tests (Grant, 2003, 2007).

To help illustrate how high-stakes testing environment's can potentially influence the curricular-instructional decision-making process for teachers, Van Hover et al. (2010) describes a student teacher's email to their methods professor while student-teaching in a high-stakes end-of-course testing environment: "On Monday I did the Vietnam War, the Korean War, the Chinese Civil war, and Tiananmen Square as well as reviewing Indian Independence, the split of Pakistan and then Bangladesh, Gandhi, and post war Japan" (p. 106). This was all "taught" within a 35-minute segment, going over the recommended allotted time by five minutes. Similarly, Grant (2007) quotes a teacher in Virginia that

commented, “it’s facts—names, dates, places. I used to be a good teacher—now I’m cramming this stuff down their throats” (p. 251). Even though teachers are often presented in the literature as gatekeepers to curricular decisions, the perception of constraints surrounding standards-based curriculums and testing cause some teachers to feel compelled to focus more on first-order concepts to ensure coverage of the official curriculums.

In order to prepare students for the end-of-course tests, teachers may feel an obligation to “teach to the test” so as to prepare students for the high-stakes tests. Although “teaching to the test” is not an inherently bad practice, the issue of breadth versus depth may arise when official curriculums are present. Teachers have a responsibility to prepare students for their end-of-course tests, making standardized tests a very influential factor in curricular-instruction decision-making. However, Gerwin & Visone (2006) caution, “although high stakes tests can have powerful impacts on classroom teaching, many other factors affect how teachers approach their courses, and many times high stakes tests do not dramatically change teaching” (p. 262). In essence, Gerwin & Visone (2006) are signaling that there is not a single factor that universally influences all teachers.

Pacing guides. Pacing guides are used to help teachers “get” through the curriculum prior to the standardized test. Pacing guides instruct teachers how much time to spend on any particular topic, typically aligned with how much emphasis is placed on the standardized test. To this point, David (2008) argues, “Whether the amount of material to cover is determined by a textbook, scope and sequence, or pacing guide, teachers today face heightened pressure to cover all the topics likely to be on the annual state test before the spring testing date” (p. 87). The pressure to “finish” the curriculum

before the state test is a major influencing factor over curricular-instructional decision-making. Additionally, in order to keep up with the pacing guides, teachers may choose to focus more on first-order concepts and neglect introducing second-order concepts. In fact, the very presence of pacing guides may reinforce a teacher's belief that their job is to disseminate the information and not actively engage in curricular decision-making.

Textbooks and ancillary materials. Another major Policy Factor influencing teacher's curricular-instructional decisions are textbooks and the accompanying ancillary materials (Lisanti, 2015; Schug, Western, & Enoch, 1997; Wineburg, 2004). Thornton (1991) found that, "teachers often identify the social studies curriculum as synonymous with the content of the textbook" (p. 242). In fact, Brooks (2013) cites data from the 2010 National Assessment of Educational Progress (NAEP) in U.S. History to help quantify the pervasive use of textbooks in U.S. History classrooms. The study found, "73% of 8th-grade students and 72% of 12th-grade students reported reading material from a textbook almost every day or once or twice a week" (p. 62). While discussing this data, Brooks (2013) argues that, "Textbooks continue to be the primary instructional tool used" (p. 62). However, Grant (2003) cautions, "Evidence of their use [textbooks] is not evidence of their impact" (p. 175). While it is evident that textbooks are continually cited as being an integral part of the history classroom, there may be different reasons for this phenomenon as well as different impacts on curricular and instructional decisions.

There are two main theories as to why textbooks have taken such a prominent role in the history classroom. One theory is that a teacher's knowledge of the particular subject is not strong enough to forgo the textbook (Wineburg, 2004). In fact, Thornton (1991) echoes this sentiment by arguing, "Teachers rely on the textbook because their subject matter knowledge is inadequate" (p.244). Additionally, Loewen (2010)

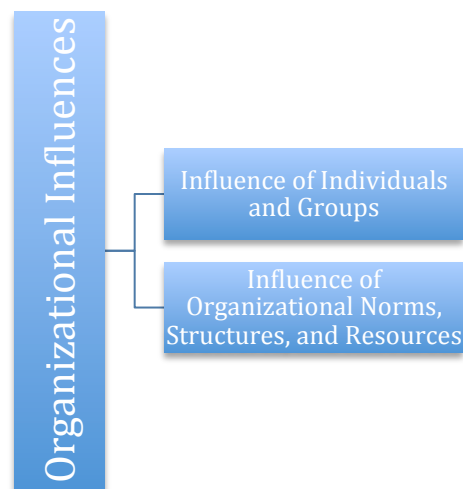
references a national survey of history teachers that revealed, “13% never took a single college history course; only 40% had majored in history or sociology, or political science” (p.10). If a teacher does not have a strong background in history, it is understandable that the textbook would be an integral part of the curricular and instructional decision-making. Teachers who do not have a strong content background in the course may defer to the textbook and ancillary materials, thus focusing more on first-order concepts, when determining what to include or exclude while lesson planning.

However, not all teachers rely on the textbook due to their lack of knowledge of the historical content. Thornton (1991) argues, “teachers tend to characterize their planning as concerning instruction, not curriculum. To many teachers, ‘curriculum’ appears to be synonymous with a body of knowledge identified by ‘experts’ and encapsulated in a textbook” (p. 245). This is in part because many textbook manufacturers have aligned their textbooks to the curriculums attached to high-stakes tests. If teachers believe that the textbooks are aligned with their official curriculums, it is reasonable to assume that they would focus more on instructional practices as opposed to the curriculum. The textbooks may serve as a way to chronologically organize a course with information neatly broken up into chapters. Textbooks have the ability to bring order to a subject, due to the plethora of information available, which may seem overwhelming to both students and teachers. Regardless of the reasons, textbooks continue to be a significant component of policy factors influencing teachers’ curricular-instructional decision-making.

Organizational influences. Organizational influences were a third and final category Grant (1996, 2003, 2007) was able to construct from his research data. Before going further, the terms “organizational norms” and “organizational structures” need to be

operationalized. Grant (2003) posits, “Norms include expectations of how ‘noisy’ classrooms can be, how grades are determined, and which textbooks will be used and how” (p. 167). Grant (2003) goes on to posit, “Structures include how the school day is organized and how students are slotted for classes” (p. 167). Organizational influences have had very few studies conducted explicitly exploring this area (Grant, 2003, 167) (See Figure 8).

Figure 8. Organizational influences—Grant (1996, 2003, 2007)



Organizational norms. Individuals such as content-area supervisors, principals, and students all have the ability to influence the decisions a teacher will make regarding the curriculum and instructional practices. Thornton (1991) argues, “Curriculum decisions, many teachers believe, are made by outside authorities and school-district curriculum committees composed of teachers and supervisors” (p. 241). Furthermore, Barton & Levstik (2004) contend, “Teachers are expected to (a) cover the curriculum and (b) maintain control” (p. 352). In essence, teachers view themselves as the disseminators of information as opposed to active members in the process of content selection. However, the extent to which studying organizational norms is limited. Grant (2003)

contends, “Teachers work in bureaucratic systems, yet the influences of those systems does not reach evenly or consistently into each classroom” (p. 167). In essence, with regards to organizational norms, teachers do still have a fair amount of autonomy, making it difficult to isolate patterns. Nevertheless, Grant (2003) does cite various studies where teacher isolation was considered to be an organizational norm (167-168). By teacher isolation, Grant (2003) refers to a culture where teachers operate independently of one another, even within departments. By operating in isolation from one another, the organizational norms of the school may create an environment where the organizational norms of the classrooms may differ significantly.

Organizational structures. Unlike organizational norms, organizational structures tend to be easier to research with more consistency throughout schools. When looking at organizational structures, how students are grouped may be one of the most visible forms of organizational structures today. Grant (2003) argues that of all the organizational influences, “it is the students who seem to have the most direct and powerful impact” (p. 163). Not so much in terms of students actively helping to make curricular and instructional decisions, rather, preconceived notions that teachers might have about the ability level of students may have a direct impact on curricular-instructional decision-making. To illustrate this point, Grant (2003) cites Onosko (1991) study where a teacher defends his curricular and instructional decisions with regards to “lower ability” students: “Given the constraints that are inherent in teaching lower ability students I am satisfied with the materials, content, skills, and teaching techniques that I use . . . I think it is unrealistic for anyone to expect consistent higher order thinking from these students . . . These students usually think and operate on a very concrete level . . . basically I would need to teach Advanced Placement students” (p. 352). Whether you

agree with this teacher's defense or not, it helps to illustrate the influence that a teacher's preconceived notions about student ability may have on curricular-instructional decision-making.

Summary

These studies, with regards to historical significance, gatekeeping, and curricular-instructional decision-making, have demonstrated that there are many factors that influence how a teacher's understanding of significance and how they ascribe value to the purpose, nature and utility of history as a school discipline are played out in the classroom. However, how these factors influence individual teachers varies case by case, making it difficult to generalize the findings (Cimbricz, 2002; Grant, 1996, 2003; Grant & Salinas, 2008). How a teacher conceptualizes historical significance will invariably have influence over their curricular-instructional decision-making. Likewise, as the final gatekeepers to the history curriculum, teachers have the ability to make the determination over what ultimately will be taught and how much emphasis will be placed on specific content, thus ascribing historical significance. Influences such as personal factors, policy factors, and organizational influences all have the ability to affect what is taught. Additionally, these influences affect teachers differently.

Research shows that historical significance in the classroom is something to be accepted, not ascribed. With high-stakes testing and official curriculums, the focus for teachers tend to be on instructional practices, not curricular choices. However, this area of study has yet to be saturated with research. Questions of whether teachers actively engage with the concept of historical significance, or whether they are passive recipients of historical knowledge remain unanswered. Additionally, there are gaps in the literature with regards to understanding how teachers navigate environments where there are many

competing, oftentimes-overlapping influences waging ideological and pedagogical battles in the classroom.

As a way to contribute to the current body of literature, I developed the research question: How does a veteran teacher determine what is historically significant to teach in a high stakes environment? From this main question, two sub-questions were developed to better understand the interconnected relationships influencing a teacher's curricular and instructional decision-making.

1. How does a veteran teacher's understanding of historical significance impact how they ascribe value to the purpose, nature and utility of history as a school discipline over time and space?
2. How tightly aligned are a veteran teacher's conceptions and perceptions of the purpose, nature and utility of history as a school subject with their observed pedagogical practices?

Using the theoretical frameworks of historical significance and curricular gatekeeping to frame my analysis, this study seeks to illuminate the day-to-day experiences of a veteran teacher within a high-stakes testing environment. In the next chapter, I will detail the methodology I employed to answer these research questions.

Chapter 3: Methodology

Throughout the process of exploring and unpacking the literature on historical inquiry, historical significance, and gatekeeping, I am constantly drawn back to the role of the teacher. In part, this is due to the fact that there have been relatively few studies investigating how teachers conceptualize and ascribe significance (Evans, 1988; Grant, 1996; Lee & Coughlin, 2011; Levstik, 2000; Terizan & Yeager, 2007). Additionally, those studies in which teachers have been included, there is the tendency to focus on what the teachers deem as historically significant opposed to their individual process of ascribing significance (Evans, 1988; Grant, 1996; Lee & Coughlin, 2011; Levstik, 2000; Terizan & Yeager, 2007).

Because there are few studies on how teachers conceptualize and ascribe historical significance, this study is designed to trace and illuminate the factors that shape the curricular and instructional decision-making of an experienced history teacher in a high stakes U.S. history course. This study is guided by the overarching question—How does a veteran teacher determine what is historically significant enough to teach in a high stakes environment? From this overarching question come two supporting questions:

1. How does a veteran teacher's understanding of historical significance impact how they ascribe value to the purpose, nature and utility of history as a school discipline over time and space?
2. How tightly aligned are a veteran teacher's conceptions and perceptions of the purpose, nature and utility of history as a school subject with their observed pedagogical practices?

In order to answer these research questions I use *Teacher as gatekeeper* and *historical significance* as my conceptual frameworks to undergird by methodology and data analysis.

Conceptual Framework

For Miles and Huberman's (1994), "A conceptual framework explains, either graphically or in narrative form, the main things to be studied—the key factors, constructs or variables—and the presumed relationships among them" (cited in Edmonson and Irby, 2008, p. 40). Throughout the entire research process, *teacher as gatekeeper* and *historical significance* framed all aspects of my research. They acted as the lens through which I constructed my research as well as interpreted my research data. Within the research environment of a classroom, I came to realize that *teacher as gatekeeper* (Thornton, 1991) and *historical significance* do not act as two related, but independent frameworks. Rather, I discovered that I could not use one without the other while researching how a teacher makes curricular and instructional decisions.

Thornton (1991) posits, "As gatekeepers, teachers make the day-to-day decisions concerning both the subject matter and the experiences to which students have access and the nature of that subject matter and those experiences" (pg. 237). Thornton (1991) goes on to conceptualize curricular-instructional gatekeeping as a process that "encompasses the decisions teachers make about curriculum and instruction and the criteria they use to make those decisions" (p.237). In other words, the act of gatekeeping entails all of the influences that impact curricular decision-making processes within the classroom. Even though teachers may be bound by an official curriculum, teachers have the final say over

the operational curriculum.⁴ How a teacher implements the operational curriculum is determined by a multitude of variables, influenced by their interactional relationships.

Invariably, choices will be made when implementing a curriculum. Due to time constraints, teachers are required to act as curricular and instructional gatekeepers. As Evans (1988) discovered, even when gatekeeping decisions are based on the same interactional relationship (how teachers conceptualize the purpose of history), the way through which this relationship influences the gatekeeping decisions differs among teachers.

Adding to the work of Thornton (1989, 1991, 2005, 2006), Grant (1996, 2007) proposed a system of classifying the variables influencing the gatekeeping process by teachers. Although the conceptual framework for my research project was curricular and instructional gatekeeping, I used the classification system used by Grant (1996, 2007). By using a preexisting conceptual framework to organize my research, it provided me, as Maxwell (2013) articulates, “places to ‘hang’ data” (p.49). Essentially, having a conceptual framework at the onset of my research enabled me to already have categories in which to organize my data: personal factors, policy factors, and organizational influences.

In addition to using *Teacher as Gatekeeper* as my conceptual framework, the concept of *historical significance* guided my research protocol. Historical events and people are not inherently significant; rather, significance is applied to them through the application of criteria (Barton, 2005; Bradshaw, 2006; Counsell, 2004; Lomas, 1990). Thus, what may be significant to one person may not be to another (Barton, 2005). As

⁴ Thornton (1989) defines the term operational curriculum as “the curriculum that is actually provided in the classroom” (p.4).

noted in my review of the literature the themes of relevance, unity and progress, and vernacular vs. official histories emerged as key sources for understanding how both students and teachers ascribed historical significance to specific content. Because these themes appeared to be so prevalent in the research, I used them as an initial lens to help frame my own analysis for how the participant ascribed and made sense of the content he selected as part of his planning and instruction.

Why a Case Study?

Overview. The investigation of what factors/values shape a teachers decision-making process, as well as how a teacher ascribes historical significance in a standards-based setting, can best be achieved through the use of a qualitative case study.

Conducting a case study enabled me to obtain a richer understanding of how various interactional relationships influence decisions regarding the curriculum, as well as instruction in one specific high school history classroom. Stake (1995) argues, “A case study is expected to catch the complexity of a single case” (p. xi). In this particular case, I explored the process one teacher goes through when planning, implementing, and assessing a historical unit. Due to the fact that there are so many variables when dealing with curricular-instructional gatekeeping as well as historical significance, this study provided “a detailed examination of a single example” (Flyvbjerg, 2006, pg. 220). By focusing on a single case, I was able to collect rich data with regard to the factors shaping an individual teacher’s curricular-instructional decision-making as well as the criteria employed when ascribing historical significance.

Ruddin (2006) notes that, “a common complaint about case studies is that it is difficult to generalize from one case to another” (p.803). Flyvbjerg (2006) echoes this sentiment by stating, “that knowledge cannot be formally generalized does not mean that

it cannot enter into the collective process of knowledge accumulation in a given field or society” (p.227). Even though the single case study that I conducted may not be generalizable in a traditional sense to every history teacher, the findings add to the literature by either confirming or contradicting the pre-existing theory concerning the relationships impacting curricular decisions made by teachers (Grant, 1996, 2007).

Setting and Participant

Setting. Washington high school (pseudonym) is located in an affluent suburb of Washington, D.C. At the time of the study, the high school had nearly 1700 students, of which approximately 65% of the students are White (See Table 1). Asian students account for 12.3%, Hispanic students account for 9.7%, and Black/African American students account for 6.7% of the school’s population. Of the previous year’s graduating class, 72% of the students enrolled in a four-year college/university, 22% enrolled in a two-year school, 5% enlisted in the military or other education, and 1% entered the workforce.

Table 1. Ethnic distribution of Washington high school

Ethnic Group	Total Number	%
White	1117	65.7
Asian	206	12.3
Hispanic	164	9.7
Black/African American	114	6.7
Two or More	91	5.4
American Indian	4	.24
Pacific Islander	2	.12

Historically, Washington high school students have performed very well on the social studies Standards of Learning (S.O.L) tests. One area where students have consistently performed well is in the U.S. History course offered during their junior year of high school. During the 2012-2013 school year, 95.8% of U.S. history students passed the S.O.L test. The following school year, 2013-2014, 95.3% of U.S. history students passed the S.O.L tests. During the 2014-2015 school year, 95.7% of U.S. history students passed their S.O.L test. To put this in perspective, in order for a high school in the state of Virginia to earn accreditation, 70% or more of students must pass the history S.O.L tests (VDOE website).

Aside from performing well on S.O.L tests, Washington high school also maintains a very high graduation rate. The annual graduation rate is very close to 100%. For the most part, students attending Washington high school are high achieving from the start. There is a culture of excellence that is pervasive not only in the school, but the surrounding community as well. There is strong parental support for Washington high school and an expectation of academic excellence. To some extent, the teachers at Washington high school are privileged due to the fact that many of the students will be academically successful regardless of whose teaching the classes.

Washington high school operates on a block schedule, meeting every other day for approximately ninety minutes. Additionally, teachers at Washington high school are required to participate in Common Learning Teams (CLTs) for each course they teach. Almost every teacher in the social science department teaches at least two different courses with some teachers teaching three. The CLTs serve the purpose of standardizing policies and practices as well as common summative assessments across subject areas. Beginning during the 2014-2015, all major summative assessments administered to

students at Washington high school were required to be common across each individual CLT. The goal is for every teacher to engage in backwards design, a process by which the end-of-unit assessments are constructed prior to the development of individual lesson plans. Even though there are common assessments administered across CLTs, teachers still have autonomy with regards to how the information is to be presented to the students on a day-to-day basis. Once tests are administered and graded, the expectation is that each CLT will discuss the data in order to help inform instruction. The school administration has set aside time within the school day for the CLTs to meet every other day for at least forty-five minutes. The CLTs add yet another factor influencing the decision-making process of a teacher.

Graduation requirements. End-of-course tests are considered to be a form of high-stake testing, as the performance on these standardized tests have a direct impact on graduation status. In order for a student to graduate with an advanced diploma in the state of Virginia, they need to earn nine verified credits: two from English, two from math, two from science, two from social studies, and one extra from math, science, or social studies. If students are going for a standard diploma, they need to only earn six verified credits: two from English, one from math, one from science, one from social studies, and one extra from math, science, or social studies. In order to receive a verified credit, students must pass the course and the accompanying S.O.L test.

The “test.” In the case of high school history courses, the S.O.L tests consist of 70 multiple-choice questions, 60 of which count.⁵ In order to receive a passing score on any given S.O.L test, students must earn a minimum of 400 out of 600 possible points.

⁵ The 10 questions that do not count are referred to as “field questions.” These questions are not identified as not counting and are used to try-out new questions for future tests.

Students who earn a 500 or higher are designated “pass advanced.” Students who do not meet the minimum standard have the opportunity to retake the test at a later date. If a student’s failing score falls between 375 and 399, students are eligible for an expedited retake. At Washington high school, these students are immediately remediated and retested within a couple of weeks of the original test date. Students who score below a 375 begin remediation the following school year and are retested in the fall.

Furthermore, students have the opportunity to retake the S.O.L tests as many times as needed in an attempt to earn the verified credits required for graduation.

Teacher resources. To help teachers navigate the S.O.L tests and accompanying end-of-course tests, the Virginia Department of Education (VDOE) has made available through their website (<http://www.doe.virginia.gov>), resources that help to outline the information that will be assessed on the end-of-course test. The three resources that teachers have access to through the Virginia Department of Education website are the standards, the curriculum framework, and the testing blueprint. As it sounds, the standards simply list all of the standards (See Figure 9) that will be tested.

Figure 9. An example of 11th Grade US history standards

Early America: Early Claims, Early Conflicts

- VUS.2 The student will describe how early European exploration and colonization resulted in cultural interactions among Europeans, Africans, and American Indians.
- VUS.3 The student will describe how the values and institutions of European economic and political life took root in the colonies and how slavery reshaped European and African life in the Americas.

Testing blueprints for each SOL course is another resource teachers have access to for the purpose of planning and pacing. The blueprint informs teachers how many questions from each standard can be expected on the SOL test. In essence, the blueprint informs the teacher as to the standards that carry the greatest weight on the tests. However, the

categories for the blueprint are very general and organized around large themes (See Figure 10).

Figure 10. Testing blueprint: number of questions per reporting category

Reporting Category	Virginia and United States History Standards of Learning	Number of Items
Assessed with Other SOL	VUS.1a-b, d, g-i	
Early America Through the Founding of the New Nation	VUS.2 VUS.4c-d VUS.5b-c	7
Expansion, Reform, Civil War, and Reconstruction	VUS.6a, c-e VUS.7a-f	10
Emergence of Modern America and World Conflict	VUS.8b-d VUS.9b VUS.10a, c VUS.11a, c-e VUS.12a-d	13
The United States since World War II	VUS.13b-e VUS.14a-b VUS.15b-d, f	13
Geography	VUS.6b VUS.8a VUS.9a VUS.11b VUS.13a	7
Civics and Economics	VUS.3 VUS.4a-b VUS.5a, d-e VUS.10b, d VUS.15a, e	10
Excluded from Testing	VUS.1c, e-f	
Number of Operational Items		60
Number of Field-Test Items*		10
Total Number of Items on Test		70

From my own personal experience as a classroom teacher, the resource that I most often see teachers utilize is the curriculum framework (See Figure 11).

Figure 11. Detailed curriculum framework

STANDARD VUS.2			
The student will describe how early European exploration and colonization resulted in cultural interactions among Europeans, Africans, and American Indians.			
Essential Understandings	Essential Questions	Essential Knowledge	Essential Skills
<p>Early European exploration and colonization resulted in the redistribution of the world's population as millions of people from Europe and Africa voluntarily and involuntarily moved to the New World.</p> <p>Exploration and colonization initiated worldwide commercial expansion as agricultural products were exchanged between the Americas and Europe. In time, colonization led to ideas of representative government and religious tolerance that over several centuries would inspire similar transformations in other parts of the world.</p>	<p>Why did Europeans settle in the English colonies?</p> <p>How did their motivations influence their settlement patterns and colony structures?</p> <p>In what ways did the cultures of Europe, Africa, and the Americas interact?</p> <p>What were the consequences of the interactions of European, African, and American cultures?</p>	<p>Characteristics of early exploration and settlements in the New World</p> <ul style="list-style-type: none"> New England was settled by Puritans seeking freedom from religious persecution in Europe. They formed a "covenant community" based on the principles of the Mayflower Compact and Puritan religious beliefs and were often intolerant of those not sharing their religion. They also sought economic opportunity and practiced a form of direct democracy through town meetings. The Middle Atlantic region was settled chiefly by English, Dutch, and German-speaking immigrants seeking religious freedom and economic opportunity. Virginia and the other Southern colonies were settled by people seeking economic opportunities. Some of the early Virginia settlers were "cavaliers," i.e., English nobility who received large land grants in eastern Virginia from the King of England. Poor English immigrants also came seeking better lives as small farmers or artisans and settled in the Shenandoah Valley or western Virginia, or as indentured servants who agreed to work on tobacco plantations for a period of time to pay for passage to the New World. Jamestown, established in 1607 by the Virginia Company of London as a business venture, was the first permanent English settlement in North America. The Virginia House of Burgesses, established by the 1640s, was the first elected assembly in the New World. It has operated continuously and is known today as the General Assembly of Virginia. <p>Interactions among Europeans, Africans, and American Indians</p> <ul style="list-style-type: none"> The explorations and settlements of the English in the American colonies and Spanish in the Caribbean, Central America, and South America, often led to violent conflicts with the American Indians. The Indians lost their traditional territories and fell victim to diseases carried from Europe. By contrast, French exploration of Canada did not lead to large-scale immigration from France, and relations with native peoples were generally more cooperative. The growth of an agricultural economy based on large landholdings in the Southern colonies and in the Caribbean led to the introduction of slavery in the New World. The first Africans were brought against their will to Jamestown in 1619 to work on tobacco plantations. 	<p>Identify, analyze, and interpret primary and secondary source documents, records, and data to increase understanding of events and life in the United States. (VUS.1a)</p> <p>Formulate historical questions and defend findings, based on inquiry and interpretation. (VUS.1c)</p> <p>Develop perspectives of time and place. (VUS.1d)</p>
History and Social Science Standards of Learning Curriculum Framework 2008: Virginia and United States History			
			2

Within the curriculum framework, teachers will find the specific standard as well as the essential understandings, essential questions, essential knowledge, and essential skills. With the curriculum framework, the Virginia Department of Education has specifically outlined what the students are expected to know and subsequently what they will be assessed on at the end of the course.

The Participant: Richard Sharpe (a pseudonym). The primary research participant in this study has been purposefully selected based on several criteria. The first criterion was that the teacher has taught the specific subject area for at least five years. By having taught the subject for five or more years, I eliminated participants who may not be familiar with the course content. The goal was to study a teacher already comfortable with the course material, thus less likely to rely entirely on the curriculum framework for planning. The second criterion was the availability of the participant. Since I work as a full-time teacher, making sure the scheduling of interviews and observations is possible is of utmost importance. The third criterion was that the teacher needed to be willing to participate in this study. Additionally, the participant was chosen due to his willingness to be very open and transparent in conversations concerning his process of planning, implementing, and assessing a unit plan. Since Richard was entering his final year of teaching prior to retirement, he was more than willing to be open and candid about his teaching practices.

Background. At the time of this study, there were eighteen faculty members in the social science department at Washington high school. The participant, Richard Sharpe, had a teaching schedule that included four academic-level U.S. history courses and one academic-level U.S. government course. Richard, a 58-year-old white male teacher, was the most veteran teacher within the social science department and one of the

most veteran teachers in the school. He began his teaching career in 1979 and has been a classroom teacher for 35 years. For the past 15 years, Richard has been teaching at Washington high school.

The formative years. Richard was born to a middle class family in Missouri, but grew up in suburban Philadelphia. He has one brother who is also a teacher, but in the private sector. When asked about his high school in comparison to Washington High School, he responded, “I went to a high school nothing like this” (September 25, 2015 interview). The demographics were similar, but the structure through which the school operated differed. Instead of having four, ninety minutes block per day, Richard explained that he had seven, fifty minute blocks a day. In this environment, he compared the structure to that of an assembly line. He went further to explain, “we didn’t do bell ringers, we didn’t do closing activities, when you came in it was this is what we have to do today, sit down, be quiet, let’s go so we can get it done so that we don’t have homework” (February 5, 2016 interview).

While in high school, Richard took a U.S. history course. However, he does not remember much from his high school history classes. In fact, he admitted that by all accounts he was not a great student while in high school. What he does remember is that the classes were very structured and the rooms were set up in rows; two traditions he carries on to this day. After high school, Richard enrolled in a private college in upstate Pennsylvania. Coming out of high school, Richard’s G.P.A was a 1.9, limiting his college options. When asked how he got accepted to college with such a low G.P.A, he replied, “I got in on my personal interview” (September 25, 2015 interview). It was during his time in college where Richard’s attraction to history began to develop when he became interested in Revolutionary War reenacting. Reenacting has played a large role

in Richard's life and has heavily influenced his love of the Revolutionary War time period. Beginning in 1979, Richard has continued to participate in reenactments to this day. Although he does not participate as much today as he has in the past, he continues in his role as a trustee and an officer in his unit.

Upon graduating from college in 1979, Richard struggled to find a teaching job. Richard returned home and served as a staff substitute for two years at his former high school. After two years of being a substitute teacher, he was hired at a high school in Southeastern Virginia. Richard found a very diverse environment in Southeastern Virginia, an environment very different from where he was raised. While working at this school, in addition to his teaching duties, Richard also coached three sports and drove a school bus. Soon after beginning his teaching career, Richard decided that it would be best for him to begin to pursue his Masters' degree in administration and supervision over the summers. Richard would spend the next twelve years in Southeastern Virginia before moving to central Virginia for an opportunity to be a head basketball coach. Richard remained in central Virginia for six year before being offered a job in Illinois, where his wife's family is from. Richard remained in Illinois for two years before taking a job at Washington high school, where he has been for the past fifteen years.

Teaching style. Although Richard does not remember a whole lot of content from his high school history courses, one thing that has stuck with him all these years is the structure that was instilled in the classroom. His classroom is set up in rows and when asked about his decision for rows, he simply responded, "I love rows" (September 25, 2015 interview). He continued by saying the reason that he liked rows was that it allowed him to walk up and down the rows and interact with the students on a one-on-one

basis. Furthermore, Richard feels that setting up his classroom in rows provides organization and structure for the students.

Richard admits that he was not a very good history student in high school. In fact, it was not until he became involved with Revolutionary War reenactment that he fell in love with history. Through reenacting, Richard found his passion for history. This passion led Richard to become a teacher with the hopes of inspiring others to be just as passionate about history. In fact, one of his favorite historical mantras is, “those who are ignorant of the past are doomed to repeat it” (September 25, 2015 interview). Richard firmly believes that students need to understand the positive and negative events in American history because, in his words, “if you just know the good, well then you are going to repeat the bad” (September 25, 2015 Interview). Richard feels that students will connect more with history if they are able to see the entire picture, not just the good things.

Over the course of Richard’s teaching career, he has modified the way through which he presents material to the students. When he first began, almost all information was transmitted to the students through teacher-directed lecture. Back when he first began to teach, class periods were 48 minutes in length, so much of that time was devoted to lecture. However, over time, Richard began to incorporate more group work and student driven activities and reduced the amount of teacher-directed lecture. This was in part due to the fact that he is now teaching in a school with a 90-minute block of time, making it difficult for both students and teachers to engage in straight lecture.

Richard firmly believes that in order for students to understand the information, they must see the information, hear the information, and write the information on a consistent basis. He stated multiple times over the course of the research project that he

attempts to add all three components into each lesson to help students make connections with the information. For Richard, history is more than just a series of date, facts and figures; history is a mosaic of the past. In order for students to have appreciation for this mosaic, students not only need to see the individual pieces, but be able to step back and see the entire picture. Through the incorporation of seeing, hearing, and writing the information, Richard believes that students will obtain a greater understanding and appreciation for history.

Data Collection

Over the course of this research project, data collection methods have been designed to provide enough data to construct a richly detailed case study. In order to collect rich data, the following qualitative methods were used: surveys of historical significance, classroom observations, interviews, and the collection of documents were utilized (See Table 2).

Table 2. Data collection calendar

Session	Interviews	Observation	Transcription	Analysis	Negotiated Outcomes	Writing
1 9/25	Pre-Observation Interview and surveys		Transcribe Pre-Observation Interview	Begin Typological Analysis		Researcher Journal
2 9/29	Short Pre-Observation Interview	Observation #1	Transcribe Pre-Observation Interview #1	Look for categories in Documents & Observations		Researcher Journal
2 9/30	Short Post Observation interview #1		Transcribe Post Observation interview #1	Look for categories in Documents & Observations	Member-checking	Researcher Journal
3 10/1	Short Pre-Observation interview #2	Observation #2	Transcribe Pre-Observation interview #2	Look for categories in Documents & Observations	Member-checking	Researcher Journal
3 10/2	Short Post Observation interview #2		Transcribe Post Observation interview #2	Look for categories in Documents & Observations	Member-checking	Researcher Journal

4 10/5	Short Pre- Observation interview #3	Observation #3	Transcribe Pre- observation interview #3	Look for categories in Documents & Observations	Member- checking	Researcher Journal
4 10/6	Short Post Observation interview #3		Transcribe Post Observation interview #3	Look for categories in Documents & Observations	Member- checking	Researcher Journal
5 10/7	Short Pre- Observation interview #4	Observation #4	Transcribe Pre- observation interview #4	Look for categories in Documents & Observations	Member- checking	Researcher Journal
5 10/8	Short Post Observation interview #4		Transcribe Post Observation interview #4	Look for categories in Documents & Observations	Member- checking	Researcher Journal
6 10/14	Short Pre- Observation Interview #5	Observation #5	Transcribe Pre- observation interview #5	Look for categories in Documents & Observations	Member- checking	Researcher Journal
6 10/14	Short Post- Observation Interview #5		Transcribe Post observation interview #5	Look for categories in Documents & Observations	Member- checking	Researcher Journal
7 11/10	Post Observation Interview		Transcribe Interview Post Observation Interview	Review categories	Member- checking	Researcher Journal
8 11/30	Clarification Interview and Member Check		Finish Transcriptions	Review categories	Member- checking	Researcher Journal
9 2/5	Follow-up Interview and member check		Transcribe Follow-up Interview	Review categories Incorporate participant contributions	Present preliminary findings to participant (member checking)	Researcher Journal
10 2/19					Present Final Findings to participant	Researcher Journal

Prior to beginning the observations, there were two surveys administered to the participant, as well as a pre-observation interview. The purpose for these surveys and interview was to gain a better understanding of his backgrounds, conception of history education, ascription of historical significance, and educational philosophy. The surveys allowed me to gain a better understanding of what Richard believes are the forty most

important bits of information that students should know at the end of the course. The second survey that was administered asked him to complete a similar task, but just for the unit being observed. Data collected from the survey helps to illustrate what the participant deemed as being historically significant as well as aided in the construction of interview questions with regards to the criteria employed to ascribe significance within his classroom and personal life.

Through administering surveys, conducting interviews and observations, and collecting documents, my goal was to collect enough rich data to illuminate the interactional relationships impacting this particular teacher as well as how he ascribes historical significance. Additionally, I kept a researcher's journal and conducted regular member checking to ensure that the participant's experience was accurately captured.

Pre-classroom observation interview. The purpose for the pre-classroom observation interview was to gain a better understanding of Richard's background, conception of history education, and educational philosophy. Additionally, a series of shorter interviews occurred prior to and immediately following each classroom observation. By conducting interviews prior to each observation, I gained a better understanding of the instructional plan for the day. During the classroom observations, I used the pre-observation interview notes to help focus my observations. Having an understanding of what the learning targets are for the day helps me recognize if Richard deviates from the lesson plan. When Richard did deviate, I attempted to identify the reason for the deviation in hopes of gaining a better understanding of the influences shaping his curricular-instructional decision-making. Following the observation, a short interview occurred to discuss any questions that arose during the observation with regards

to the implementation of the lesson plan as well as identify any influences that may have altered the day's lesson from conception to implementation.

Pre-interview surveys. Prior to conducting the first interview or classroom observation, the Richard was administered two surveys. The first survey asked him to list the forty most significant “things” that must be taught during this course as well as the ten most important individuals. Furthermore, Richard was asked to include a rationale for the inclusion of these “things.” By constructing a list of the forty most significant “things” and a list of the ten most important individuals, Richard gave me an insight into what he perceives as being historically significant. Having Richard give the rationale for each selection also shed light on the criteria he used to determine significance.

The second survey represented a closer look into the conception and ascription of historical significance. Instead of looking at the course in its entirety, this survey focused specifically on the unit being observed. Richard was asked to list the fifteen most important “things” to be taught during this unit as well as the five most important people. As with the first survey, Richard was asked to provide a rationale for their inclusion on the list.

The purpose for having Richard complete the pair of surveys was to better understand the process through which they ascribe significance in terms of curricular decision-making. Additionally, I used the data collected to help construct specific interview questions concerning the conception and ascription of historical significance within a high-stakes environment. Recognizing the criteria being employed when ascribing significance not only helped me better understand the process through which the participant ascribes significance, but also shed light on how the various interactional relationships affect the curricular decision-making process.

Interviews. In an attempt to better understand the intersection of multiple, sometimes competing, relationships with regards to how a teacher plans and implements a unit, interviews were utilized to collect data. By using an open-ended, semi-structured interview protocol, the goal was to better understand how a teacher determines what is significant enough to teach and how these decisions are made. Through the process of interviews, Richard had the ability to go into different directions that I might not have foreseen. In large part this is because the interviews were carried out more as a conversation than a formal interview. I did my best to gently guide the conversations through a series of open-ended questions, but Richard ultimately had the autonomy to dictate the direction of those conversations. With the permission of the participant, all of the interviews were audio recorded and later transcribed.

Over the course of this research project, twelve open-ended interviews with the Richard took place. An open-ended interview protocol allowed for more flexibility to modify the interview when necessary. Interviews occurred prior to beginning the observations, after each observation, and at the conclusion of the observations. The pre-observation interview as well as the post observation interview were approximately one hour in duration, and attempted to gather rich data with regards to Richard's curricular and instructional decision-making processes. The pre-observation interview consisted of background questions as well as open-ended questions regarding the planning process as well as the implementation process of a unit of study. The purpose for this pre-observation interview was to gain a better understanding of Richard's background. By better understanding his background, I gained insight into how his background influenced his curricular and instructional decision-making.

During the interview process, I incorporated what Seixas (1994) terms a naïve technique, that is, “the interviewer refuses to accept anything as understood, declining to invent meaning for the subject’s responses (p.288).” In doing this, the interviewer attempts to avoid inserting personal conclusions/beliefs into the interview process. During the interviews, I asked follow-up questions as well as clarification questions so as to attempt to collect the complete thoughts of the participant. By incorporating a naïve technique, I attempted to avoid filling in data gaps with my own assumptions and conclusions. Additionally, since I am also a classroom teacher, I wanted to mitigate the influence of my own bias during the interview process. In short, my goal in using the naïve approach was to capture Richard’s voice, experiences, and thoughts in as pure a form as possible.

Short pre-observation and short post-observation interviews occurred systematically throughout the data collection process. Prior to and following each observation, a short interview took place. The purpose of conducting short pre and post-observation interviews served two major functions: clarification and member checking. In order to gain a better understanding of the interactional relationships that Richard used when making curricular and instructional decisions, conducting short pre and post observation interviews allowed me to compare the intended outcome of the lesson and the actual outcome of the lesson. These interviews were semi-structured with a series of base questions. In addition to these base questions, during the short post-observation interview, the teacher was asked specific questions constructed from the field notes. Through these shorter interviews, I was able to seek clarification concerning questions that arise during the observations as well as obtain a deeper understanding of the day-to-day curricular and instructional decision-making processes of Richard. Instead of having

Richard reflect on the whole experience of this research at the conclusion of the data collection, these interviews served as a method of collecting rich data at a particular point in time.

Once the observations concluded, there were several additional interviews. During these final interviews, I sought to better understand how Richard ascribed historical significance during this unit of study as well as the understanding the interactional relationships that shaped his curricular-instructional decision-making process. This interview allowed me to inquire about other unit plans that Richard has created, allowing me to compare them to the unit plan that was included in this study. Additionally, I sought clarification on questions that arose during the observations and from previous interviews. Furthermore, they allowed me to present preliminary findings to Richard and seek his input. Throughout the data collection process, I actively constructed the interview questions for this final interview.

Aside from gathering rich data, the purpose of these interviews, as Seidman (2006) argues, was to determine internal consistency. Since it is difficult for an interviewer to truly know whether or not a participant is being completely honest in their responses to interview questions, “internal consistency over a period of time” (p. 25) will help to strengthen the validity of the findings. Additionally, there was some question redundancy to increase the confidence in my findings (Stake, 2010, p.97). Having the ability to compare multiple transcripts from a series of interviews over a period of time allowed me to determine inconsistencies and then address those inconsistencies with the participant.

Classroom Observations

After completing the first semi-structured teacher interview, I began observing Richard delivering a unit of instruction to one of his history classes. The unit observed took place over six blocks, each block lasting approximately 90 minutes. However, I only observed five blocks because I was not available the day that the test was administered. Although I was not present for the day of the test, I was given access to the test for further analysis. The U.S. history class I observed took place during the 3rd block of the day, from 12:13 p.m. to 2:13 p.m. Because this was during the lunch block, Richard taught for 60 minutes prior to a 30-minute lunch and then taught for 30 minutes after lunch.

Field notes. During each observation, field notes were taken. In order to minimize any disruption due to my presence, I sat at a desk against the wall in the classroom and attempted to get to the class before students began to arrive. The first thing I would do each day was to write down the day's agenda as well as the objectives of the lesson, which were written on the board each day. Prior to the start of the class, Richard would share with me copies of everything that he was planning to use that day in class. This allowed me to follow along the lesson better during the observations as well as limit the amount of distraction my presence in the classroom brought. In an attempt to gain as much information, I used the method of "raw field notes" along with "filling in" (Hatch, 2002, 77). "Raw field notes" consist of, "descriptions of contexts, actions, and conversations written in as much detail as possible given the constraints of watching and writing in a rapidly changing social environment" (Hatch, 2002, 77). In essence, while observing each lesson, I would record in the most complete form possible, every aspect

of instruction I could. Below is an example from my field notes from my first observation on October 1.

10/1

- *Boston Massacre Reading*
 - *Students independently read a short reading on the Boston Massacre*
 - *While reading, they were to think about 4 guided questions*
 - *While reading, a picture of Boston Massacre was on the Promethean board (Tin print by Paul Revere)*
 - *When finished, students were asked to discuss the 4 questions as a class.*
- *After discussing the questions, Richard began talking about the tin print on the board*
 - *He asked students to infer about the picture independently*
 - *Asked students to share their thoughts with a nearby classmate*
 - *Richard spoke about how long the print took to make*
 - *Timing is sketchy (made public very short after the massacre)*
 - *Richard insinuates that it could have been made ahead of time*
 - *Richard points out various aspects of the tin print*
 - *Solider faces are happy*
 - *Students are asked to try and link to issues today with the police (attempted to connect to the issues of Black Lives Matters, but moved on quickly)*
 - *Richard questioned and answered: What was left out of the picture?*
 - *Sticks and snowballs*
 - *Richard says "It didn't happen that way"*
 - *Teacher directed: discussed other accounts of why the first person shot*
 - *Richard discussed the bias of the tin picture*
 - *Said there may have been a sniper in the window*
 - *It was a set-up, a propaganda piece*
 - *Revere used this incident to spark patriotism against the loyalists*
 - *Focused a lot on the Boston Massacre and how it was used as propaganda against Great Britain*
 - *Spoke about the two soldiers who were convicted and sent back to England*
 - *Asked students "What was the significance of the Event?"*
 - *1 student began to answer, but the teacher finished the thought*
 - *The Boston Massacre helped to galvanize ill-will towards British authority in the colonies*

The above account from my field notes was from a portion of the day's lesson that lasted approximately ten minutes of the ninety-minute block.

Understanding that a classroom environment can be hectic when it comes to making observations, I did, as Hatch (2002) suggests, incorporate a process of "filling in." Hatch (2002) describes "filling in" as, "going through the raw data as soon as possible after leaving the field and making a more complete description based on the raw

notes and what is remembered from the setting” (p. 77). During the process of “filling in,” I attempted to refrain from inserting my own personal analysis or thoughts. At the end of each day of observations, I had the opportunity to read over and “fill in” any information or observations that were important while the memories were still fresh in my head. The purpose of the observation notes is to present an accurate representation of the classroom environment as well as a rich description of the information being presented to the students.

Hatch (2002) recommends going into each observation with a driving question or questions to help focus the observation. Understanding that it is impossible to observe everything that occurs within a classroom, going into each observation with a game plan was important. Since my research is focused on Richard’s curricular and instructional decision-making, my broad focus was on the delivery of instruction by Richard. More specifically, I was interested in observing each lesson within the unit as well as interactions with the students from Richard’s perspective. Did Richard place more emphasis on certain bits of information or go off on historical tangents during the lesson? If he does go off on tangents, was there an observable reason? Were there planned aspects of the unit that did not take place?

Document collection. Since this research project looked at the curricular and instructional gatekeeping practices of a single teacher, understanding the various curricular inputs are important. Copies of student handouts, the unit test, as well as the district and State curriculum guides were collected for further analysis. The district and State curriculum guides were important to collect to understand how policy factors influence curricular-instructional decision-making. Often times, the unit tests are created using the curriculum guides as a resource.

Table 3. Documents collected

- Ancillary reading study guides
 - Chapter 4, section 1: The stirrings of rebellion
 - Chapter 4, section 2: Ideas help start a revolution
 - Chapter 4, section 3: Struggling toward Saratoga
 - Chapter 4, section 4: Winning the War
- Video viewing guide for “Story of a Patriot”
- Worksheet on the political ideas and events leading to the war
- The Boston Massacre facts and questions: Was Captain Preston to blame?
- Sequence chain for the revolution
- The Declaration of Independence rewrite activity
- Video viewing guide for “The Crossing”
- The Frame Routine:
 - Continental army strengths and weaknesses
 - British army strength and weaknesses
- Ancillary reading: The Siege of Yorktown
- American Revolution study guide
- Revolutionary War unit test
- Revolutionary War Internet scavenger hunt
- Virginia S.O.Ls
- District curriculum framework

The district and State curriculum guides were important to collect to understand how policy factors influence curricular-instructional decision-making. Often times, the unit tests are created using the curriculum guides as a resource. Furthermore, the unit plan, individual lesson plans, and student handouts are created to support instruction to prepare students to take the unit test. By collecting multiple documents, I was able to clearly trace how significance emerged within and across documents and lesson plans (See Table 3). When surrounded by a variety of relationships, is it possible to ignore some relationships while focusing on others? Or do the interactional relationships, just by their existence, influence an individual’s values and decision-making process? Understanding how a teacher determines what history is significant enough to teach may illuminate the various relationships at play.

Research journal. Throughout the entire research process, I kept a reflective journal. The purpose for doing so was to maintain an audit trail while recording my thoughts and preliminary analysis during the data collection process. Journaling allowed

me to make notes addressing questions, biases, and research protocol (Stake, 2010, p. 101); it served as a place to get my personal thoughts and ramblings on paper. I kept a reflective journal to comment on my findings as well as to begin the process of fleshing out any patterns that become apparent. During one of my reflective journal entries after finishing transcribing all of the interviews, I wrote:

After spending time with the standards, I discovered that Richard teaches certain things because he believes they are in the S.O.L framework, but in actuality they are not mentioned. This is especially true about the Revolutionary War. Other than Lexington, Concord, and Yorktown, there is no specific mention of any other battles. Richard has mentioned on several occasions that he didn't understand how the S.O.Ls mentioned Saratoga as the turning point of the war; however, Saratoga is not mentioned in the standards at all. Note to self: I need to try and look at older versions of the S.O.Ls to see if his is where he saw Saratoga being mentioned. (January 28, 2017 Reflective journal)

This entry helped me to make sense of the data collected as well as helped to construct questions for an additional follow-up interview. There were times where I felt overwhelmed with the amount of data I was working with and the reflective journal helped to organize my thoughts as well as create a place where I can question my findings. Additionally, throughout this process, I checked my findings against the typologies being used so as to determine if non-examples are present. The journal served the purpose of not only addressing data analysis, but allowed me to examine my methodology and approach with the participant. In addition, it allowed me to reflect on my own experiences and biases about the role of education.

Triangulation. Incorporating surveys, interviews, researcher journaling, observations, member checking, and document collection helped to establish

triangulation of the data, leading to greater validity (Maxwell, 2013, p. 102; Stake, 1995, p. 108). Maxwell (2013) argues that, “This strategy reduces the risk that your conclusions will reflect only the biases of a specific method, and allows you to gain a more secure understanding of the issues you are investigating” (p. 102). Since this study involved a single case, I needed to take great caution to limit my own bias through the process of data triangulation (See Figure 12).

Figure 12. Data triangulation



Member checking was an important component of the research process. In order to accurately depict this case study, I needed to ensure that my observations were accurate. Each post observation interview served to check my understanding against that of the participant. The post observation interview gave me a chance to compare my notes

and perspective with Richards's perspective. Additionally, it also gave me the opportunity to ask questions and to seek clarification from Richard. This was important not only to member-check, but to also ensure that I consciously checked my positionality as an educator at the forefront of my research process. I used the post observation interviews to help ensure that I was not allowing my own experiences of being an educator to take away from Richard's experiences and perceptions. Once I had transcribed the interviews, I would give a copy to Richard to look over. Again, the goal in doing so was to ensure that Richard's story remained his own. By collecting interviews, conducting observations, collecting documents, and checking-in consistently with Richard, the goal was to illustrate Richard's curricular and instructional decision-making in as much rich detail and honesty as possible.

In order to address my research questions, various forms of data were collected for specific purposes. A major component of my data collection was the incorporation of twelve one-on-one interviews. The interviews served the purpose to capture Richard's voice and to gain his perspective on his teaching practices, conceptualization of historical significance, and curricular and instructional decision-making. Having the ability to hear Richard describe his understanding of historical significance as well as his conceptualization of the purpose for studying history prior to the observations helped to create a baseline of knowledge to help inform my observation protocol.

During the observations, I was able to gain first hand knowledge of Richard's practices within the classroom as well as comparing information gained during the interviews with information gained from the observations. The interviews also enabled me to circle back to Richard to ask specific questions about things I witnessed during the

observations. This process not only served to help triangulate the data, but also ensured that member checking was occurring frequently.

Over the course of this research project, I had Richard fill out several surveys. Two of the surveys were administered prior to beginning the observations and one was administered after the observations had concluded. The first two surveys were used to help determine what information Richard deemed to be the most important for the specific unit being observed as well as for the course. The survey that specifically address the unit being observed, Richard was asked to list the fifteen most significant “things” that must be taught as well as the five most important people included in the unit. Aside from just listing, Richard was asked to give a rationale for the inclusion. He was then asked to do the same thing for the entire course, but instead of fifteen significance “things” he was asked to list forty as well as the top ten individuals that needed to be included. What these surveys demonstrated was the influence of the S.O.L standards on what Richard deemed as being most significant. However, some things that he included as being significant due to their inclusion in the S.O.L standards were found to not actually be included in the standards. This revelation helped to construct interview questions to really try and determine the influence that the S.O.L standards played in Richard’s curricular and instructional decision-making.

After the observations were concluded, I constructed a third survey to get Richard’s thoughts on the various influences affecting his curricular and instructional choices. He was asked to rank seven influences in order of importance when creating lesson plans. Richard was also asked to explain the rationale for the rankings. The seven influences were: individual S.O.L standards; the end-of-course test; textbook and ancillary material; personal interest; time constraints; C.L.Ts; and students and student

interest. Additionally, Richard was asked if there were any other influences that I should be aware of. I was able to then use this information to compare to the various pieces of data that had been collected such as interviews, observations, unit and lesson plans, district and State guidelines, as well as the unit test. Every piece of data collected served the purpose to investigate both research questions. It was of utmost importance to triangulate the data to ensure that my analysis was both thorough and complete (See Table 4).

Table 4. Data collection matrix

Research Question	How does a veteran teacher's understanding of historical significance impact how they ascribe value to purpose, nature, and utility of history as a school discipline?	How tightly coupled are a veteran teacher's conceptions and perceptions of the value and nature of history as a school subject shaped and developed over time and space?
Data Sources	<ul style="list-style-type: none"> • 12 one-on-one interviews • 5 classroom Observations • 3 surveys • Unit/Lesson Plans • District Curriculum Guidelines • Virginia Standards of Learning • Unit Test • Researcher's Journal 	<ul style="list-style-type: none"> • 12 one-on-one interviews • 5 classroom Observations • 3 surveys • Unit/Lesson Plans • District Curriculum Guidelines • Virginia Standards of Learning • Unit Test • Researcher's Journal
Why do I need to know this?	To document how a teacher ascribes historical significance when planning, implementing, and assessing a historical unit in a high-stakes setting.	To document the various interactional relationships that help to shape a teacher's curriculum decision-making.

Data Analysis

For this case study research, I incorporated interviews, observations, artifacts, and a reflective journal into my data capture. Analysis of the data began immediately

following the first semi-structured interview (Hatch, J.A., 2002, p. 149; Maxwell, 2013, p.104; Stake, 1995, p. 78).

Typological analysis. Understanding that there are many factors that affect how teachers ascribe historical significance within the classroom environment, I incorporated typological analysis (Hatch, 2002). By applying typological analysis to my data, I began the research process of *teacher as gatekeeper* with predetermined typologies: personal factors, organizational influences, and policy factors. Similarly, to begin researching *historical significance*, I used the predetermined typologies of relevance, vernacular and official histories, and unity and progress. From there I used these predetermined typologies to organize the data (Hatch, 2002, p. 152). According to Hatch (2002), there are nine steps in typological analysis:

1. Identify typologies to be analyzed
2. Read the data, marking entries related to your typologies
3. Read entries by typology, recording the main ideas in entries on a summary sheet
4. Look for patterns, relationships, themes within typologies
5. Read data, coding entries according to patterns identified and keeping a record of what entries go with which elements of your patterns
6. Decide if your patterns are supported by the data, and search the data for nonexamples of your patterns
7. Look for relationships among the patterns identified
8. Write your patterns as one-sentence generalizations
9. Select data excerpts that support your generalizations (Hatch, 2002, p. 153)

To begin analyzing the data with regards to curricular and instructional influences, I used the three broad factors cited by Grant (2007): personal factors, organizational influences, and policy factors (p. 252). My initial set of coding consisted of going through the data, using highlighters for color-coding purposes and categorizing the data according to Grant's (2007) three major factors. For the purpose of analyzing data with regard to historical significance, I attempted to determine if the data correlates with the major themes generalized from previous research conducted with regards to ascribing significance: relevance, vernacular and official histories, and unity and progress.

Even though the use of typological analysis is inherently deductive due to starting out with predetermined categories, inductive analysis was conducted. Hatch (2002) notes that, "not all important data are accounted for by a typological analysis" (p. 160). Throughout the process of analyzing data, I checked my categories to make sure that they were supported by the data. Hatch (2002) recommends using what Glaser and Strauss (1967) call the "constant comparative method" (Hatch, 2002, pg. 158). Through this method, all data was examined and reexamined to determine if any of the data contradicts the findings. Through the course of this analysis, it was concluded that all of the data collected could be categorized into the preexisting categories due to how broad the categories are.

Analytical Lenses

Teacher as gatekeeper. Attempting to understand all of the influences that go into the curricular and instructional decision-making of a teacher was overwhelming. To help analyze the data collected, I used the analytical lens of *teacher as gatekeeper*. While collecting and analyzing the data, I used the three broad categories put forth by Grant

(1996, 2003, 2007) to help organize my research findings. Because the categories are so broad, it allowed me to organize my data around collection methods from the beginning.

Historical significance. To help analyze data concerning historical significance, I used the themes of relevance, vernacular and official histories, and unity and progress. Incorporating these themes into my data analysis protocol, it created a place to “hang” data collected. Due to the fact that the themes pulled from the research are so broad, all of the data collected with regards to historical significance fit into one of these three broad categories. However, more of my time was spent analyzing the data within each typology than finding new typology to “hang” data.

Emerging findings. Due to the fact that I used very broad categories to organize my data collection, I did not discover any non-examples. All of the data collected could be “dropped” into at least one of the six categories. Where I spent more time was organizing the data within each category. For example, under the broad categories of policy factors and organizational influences, the sub-category of pacing was created. During interviews, Richard spoke many times about pacing and time constraints. However, the reasons behind the pacing and time constraints were not always influenced by the same factors. On one hand, Richard attributes pacing concerns to the pressures of the S.O.L test at the end of the course. He commented, “Last year, I finished the curriculum the day before the S.O.L test. I mean, the snow and everything else, we just needed to get done” (September 25, 2015 Interview). In this instance, Richard saw pacing concerns being directly connected with policy factors such as the date of the end-of-course test. He alluded to the fact that even though the previous year there were a lot of snow days, the date his students tested did not change. This caused Richard to have to condense topics and focused only on those topics tested by the State. He went on to

explain, “It is watered-down, it is strictly only the standards when you get behind. I mean, that is all you can do” (February 5, 2016 Interview).

In addition to having pacing concerns fall into the category of policy factors, they also could be attributed to organizational influences. Prior to beginning the observations, Richard discussed how the school’s mandatory Emergency Response Plan (ERP) drill caused pacing concerns for him. During our first interview, Richard discussed his concerns in detail.

Cause I got a test today, and we’ve got the ERP today, if the ERP goes longer than what they told us it was going to, I’m going to have kids who are going to be stressing because they don’t have enough time because they work slowly to finish the test. Or whether they will be able to do as good of a job on the test as they could. An so, if an evaluator comes in, they’re going to say, ‘your kids didn’t know the material if they didn’t score well.’ And I’m going to say, ‘no, you can’t say that because of the change in the environment.’ Now some people would say, move the test back. I can’t move it back a day if I want to stay even with the CLT and if I want to stay on the schedule to be able to have the curriculum done by the time the SOLs come. (September 25, 2015 Interview)

Through this excerpt, Richard illustrates how policy factors and organizational influences affect his curricular and instructional decisions. Richard appeared to be frustrated by the fact that these “outside” influences were impacting what was going on in his classroom. Even though broad categories were used to organize the data, individual factors often time intersected with multiple categories. At times, the intersecting influences were so numerous that it was difficult to isolate single factors when it came to specific curricular and instructional decisions.

Role of Researcher: Positionality, Reflexivity and Ethics

Positionality. While conducting this research, my goal was to portray Richard's voice as accurately as possible. To do this, I needed to acknowledge the experiences that I brought to this research question as a high school social studies teacher. I was aware that my experiences and pedagogy may differ from Richard's and this may influence how I perceive the data. Furthermore, as a researcher, I needed to be aware of my own biases so that I do not unintentionally lead Richard's responses to the answers I want. Throughout the research process, I kept a research journal for the purpose of reflexivity. In order to maintain a reflexive approach, I was open with Richard about my interpretations of the data.

Reflexivity. Part of the reflexive process will be to acknowledge the power relationship that exists between the research participant and myself. Being a teacher in the same social science department as Richard, I was aware of the implications this may have on not only how Richard behaves but also how I perceive the data. LeCompte (2000) suggest that researchers need to continually question their conclusions to be sure that their analysis is an accurate reflection of their participants' experiences as opposed to a reflection of their own experiences (p.152). I limited the amount of bias in my research through a collaborative approach with Richard as well as triangulation of the data. Richard helped to play an important role in analyzing the data. I reviewed my findings with Richard regularly to ensure I was accurately representing his voice. During every post-observation interview, I would discuss my initial observations with Richard. The post-observation interviews were used to not only examine further Richard's curricular and instructional decision-making, but to serve as a continual, consistent form of member checking. Additionally, multiple forms of data collection occurred to minimize the risk of

bias (Maxwell, 2013, p.102). Although I took great measures to ensure that my own experiences and beliefs did not manipulate the data to match my preexisting ideas, I was aware that my experience as a high school social science teacher could influence my perceptions of the data.

Ethics. While conducting this research, my goal was to portray Richard's voice as accurately as possible. To do this, I have to acknowledge the experiences that I bring to this research as a teacher. I am aware that my experiences differed greatly from my participant and that this could influence how I perceive the data. I was open with Richard about my interpretations of the data. Throughout the research process, I reinforced the idea that I am in the role of researcher, not a high school social science teacher.

Furthermore, the rest of the social science department did not have access to the field notes, interviews, or documents collected during the research process.

Summary

The purpose of my study is to examine the competing interactional relationships that teachers face during the process of curricular and instructional decision-making. Specifically, I examined how a teacher ascribed historical significance as well as how he determined what is important enough to include while teaching a unit on the American Revolution in an 11th grade U.S. History course with a State created end-of-course standardized test. When determining what is important enough to teach, there are competing interactional relationships for teachers. These interactional relationships represent the various factors that play into the process through which teachers make curricular-instructional decisions on a daily basis. Often times, these interactional relationships overlap and even shift from one influence to another. In essence, the interactional relationships are fluid in nature and constantly shifting. This research sought

to capture the experiences of a veteran teacher as he navigated the various influences affecting his curricular and instructional decision-making through a single unit of instruction.

Chapter 4: Findings

This case study investigates an individual teacher managing a multitude of influencing factors while planning and implementing a unit of instruction in a high school U.S. history classroom. This dissertation argues that teachers continually negotiate the various influences concerning curricular and instructional decision-making. Furthermore, this dissertation argues that the various influences do not act independently of one another; therefore, making it difficult to isolate individual influences to determine the root cause of both curricular and instructional decisions. As a case study of one teacher, this study was driven by the question: How does a veteran teacher determine what is historically significant enough to teach in a high stakes environment? Out of this overarching question come two specific, pointed questions:

1. How does a veteran teacher's understanding of historical significance impact how they ascribe value to the purpose, nature and utility of history as a school discipline over time and space?
2. How tightly aligned are a veteran teacher's conceptions and perceptions of the purpose, nature and utility of history as a school subject with their observed pedagogical practices?

Since there have been very few studies conducted concerning the process through which veteran teachers make historical selections, this study will help to add valuable information to the relatively new, but ongoing discussion concerning the ascription of significance in the history classroom (Evans, 1988; Grant, 1996; Lee & Coughlin, 2011).

Understanding how various influences affect the criteria through which teachers ascribe significance may shed light on research concerning students and historical significance. This study examines the intersection of significance of product (official

curriculum) and the significance of process (an individual's ascription of significance) and how a teacher reconciles differences between the two when planning and implementing a unit.

As I began the process of analysis, I focused my attention on the concept of *Teacher as Gatekeeper*. Even though there is a mandated curriculum present, teachers still have the final say as to how much time to devote to each element as well as how in-depth to go with the topic. Understanding that there are many factors influencing a teacher's curricular and instructional decision-making, my analysis included typologies put forward by Grant (1996, 2003, 2007). The typologies of policy factors, organizational influences, and personal factors created a sense of organization to help categorize data and artifacts collected. Through the analysis process, I discovered that personal factors and policy factors appeared to have had the greatest influence on the Richard, while organizational influences appeared to have minimal influence over his curricular-instructional decision-making. However, these influences were fluid and constantly shifting. Additionally, it would be an oversimplification to argue that the various influences operated independently of one another.

Due to the complexity surrounding the process of understanding all that goes into the curriculum and instructional decision-making of a single teacher, Grant's (1996, 2003, 2007) typologies helped me to begin to organize my data. However, I discovered that the multitude of influences did not neatly fit into the pre-determined typologies of personal factors, organizational influences, and policy factors. Rather, it was discovered that the individual influences floated between the typologies with great fluidity. This in turn made it difficult to isolate each typology to explore independently of one another. This chapter begins by exploring how Richard's understanding of historical significance

impacted how he ascribed value to the purpose, nature, and utility of history as a school discipline. Following a discussion concerning historical significance, I will then explore how Richard's instructional decisions and activities are organized and implemented within his Revolutionary War unit.

How does a veteran teacher's understanding of historical significance impact how they ascribe value to the purpose, nature and utility of history as a school discipline over time and space?

Using Seixas' (1994) definition of significance⁶ as a starting point, I attempted to ascertain the criteria Richard employed when making curriculum and instructional decisions. Understanding the criteria one uses when ascribing significance is an integral component of historical inquiry (Lomas, 1990). However, it is important to point out that since Richard is a teacher in an educational environment where high-stakes testing is the norm, isolating personal significance from professional significance proved to be difficult.

Due to the fact that I was focused on the criteria used to determine what was important enough to teach in the course, Richard often times referenced the official standards as the main criteria influencing his decision-making. Richard commented, "Lets face it, the history class is all about passing the test. I mean, they can talk about all the other grandiose things, but if the kids can't pass the test, the kids can't graduate, then you have failed at your job. I don't like to fail" (September 25, 2015 Interview). This statement by Richard sums up how he feels about the S.O.Ls and accompanying test. However, at times, his personal criteria were sometimes at odds with the official

⁶ "the valuing criterion through which the historians assesses which pieces of the entire possible corpus of the past can fit together into a meaningful and coherent story that is worthwhile" (Seixas, 1994, 281).

curriculum of the State. One such situation was when Richard was discussing how his personal criteria for significance conflicted with the S.O.Ls:

One decision we will have to make somewhere down the line in this unit is the S.O.Ls say the turning point in the war is Saratoga because that is what convinces the French to come in and with French aid we were able to beat the British. But on of the other things as a historian, to me, if I don't touch on Princeton and Trenton, where Washington won his first battle and saved his own army, the American army doesn't get to Saratoga to win that battle. (September 29, 2015 interview)

This was in part mainly due to the breadth of the course, not allowing for the depth that Richard sought out for his students. Even though Richard felt constrained by an official curriculum, he still employed his own personal criteria for significance throughout this unit. Moreover, the criteria he invoked mirrored some aspects of criteria created decades earlier by Partington (1980). It can be argued that each component of Partington's list of criteria (as discussed in chapter 2) was present to some extent throughout this unit. However, Richard relied most often on the importance and relevance of historical events and people when justifying his own personal historical selections.

Importance and relevance. Richard firmly believes that in order for students to appreciate history, they must be able to relate past events and people to their own lives. Furthermore, Richard believes that students needed to understand the social aspects of history: how did the people live and how did they think? However, when asked to discuss his criteria for historical selection within his classroom, he mostly deferred to Virginia's Standards of Learning. Even so, Richard still inserted information into the instruction that corresponded with his personal criteria for historical significance. Yet,


Richard is still constrained by time and has to be very selective where he decides to go into greater depth and detail. When asked about why he chooses to spend extra time on the people's lives, he responded, "They had families, they had children, all they wanted was shelter, and they wanted to be successful in life" (October 6, 2015 interview). In this instance, Richard was reinforcing the criteria of relevance and importance. Richard wanted the students to see historical actors as people like them with similar wants and desires in hopes that the students would be able to better relate to people of the past. Richard believes, "If the kids can make the connections, they are going to remember it and see it" (October 2, 2015 interview).

Throughout the unit, Richard consistently attempted to make the information relevant to the student lives through the incorporation of stories, readings, images, and film. One such example is when Richard was discussing the Stamp Act. In an attempt to make the Stamp Act relevant to the student's lives, Richard attempted to connect it to the current gas tax. Richard asked students if they liked paying the additional money for gas including the 9/10 of a penny per gallon. Many students indicated that they would prefer to pay less for gas, but understood that it is expensive to maintain roads. Richard then asked if they really did not want to pay the tax, what would their options be? This led to a conversation about how colonists boycotted paper goods to show their displeasure with the Stamp Act. Richard then asked students if they were that upset with the additional gas tax, they could boycott buying gasoline. Although this may be an apples to oranges argument, this discussion got students to think about history in a more contemporary context, thus connecting it to their own lives. In this case, Richard was attempting to make the Stamp Act and its consequences relevant to the students' lives.

Surveys of historical significance. As part of the research methodology to better understand the reasoning behind some of his curricular decision-making, Richard was asked to complete a few open-ended surveys regarding the most “important” things that students needed to know not only during the Revolutionary War unit, but the overall course as well. It was not a surprise to see that many of his decisions were made with the Virginia Standards of Learning in mind. However, Richard was still able to make many decisions using his own set of criteria to determine what was important enough to include. When asked about who the five most important people were to teach during this unit, only two of the five were specifically mentioned in the standards of learning (See Figure 13).

Figure 13. The five most important people of the Revolutionary War

Who are the top 5 individuals that must be taught in this particular unit?	
Name and Dates	Rationale for inclusion
1. George Washington	American Military Leader
2. Lafayette	American Military Leader
3. Clinton	British Military Leader
4. Howe	British Military Leader
5. Franklin	Diplomatic treaty to recognize America

 *Not specifically mentioned in the Standards of Learning

Even though Richard used the standards as the driving force to many of his curricular decision-making, this survey most clearly demonstrated the ability for him to incorporate his own criteria into the process. During a post observation interview, Richard was asked to discuss his selection of the five individuals that must be taught during this unit. It should be noted that the names specifically mentioned in the

articulation guide of the standards of learning list Locke, Paine, Jefferson, Franklin, and Washington. Richard felt that Locke and Paine were not as important since they were taught the previous year in modern world history. Whereas for the inclusion of Lafayette, Clinton, and Howe, Richard responded, “I don’t see how you can read about the Revolutionary War and not talk about them” (November 11, 2015 interview). Richard felt that it would be difficult for students to understand the Revolutionary War if they did not have an understanding of the roles played by Lafayette, Clinton, and Howe (See Figure 14).

Figure 14. Richard’s justification for the inclusion of Lafayette, Howe, and Clinton.

Historical Figure	Reason for Inclusion
Lafayette	“I felt it was important to show that the French did not simply appear in the Revolutionary War. Lafayette and many others were inspired by the events in America. These aristocratic Frenchmen realized that for this experiment to be successful the Americans would need assistance in defeating the British. Thus in early 1777, when Lafayette arrived he offered to instruct the Continental Army in more effective ways of fighting the British. In addition as a French aristocrat he did have some influence with the King of France and his foreign policy. As a result, he was able to convince the French monarchy that they should actively support the American Revolution. As a result of Lafayette’s experiences and influence, the French did not just show up for Yorktown, they had secretly assisted us for several years culminating in a treaty and openly assisting us in 1781.”
Howe	“Howe has a long-lasting affair with an American who was married to a Loyalist man. Many historians believe this relationship distracted Howe enough that the Continental Army was able to survive the winter of 1776-1777. I also include Howe to spice up and humanize something that happened over 200 years ago.”
Clinton	“I include Clinton because he was the British choice for leading the campaigns against the middle and later the southern colonies. Admittedly, Clinton stays in New York during the southern campaign, thus playing a little role in the latter stages of the fighting and later organizes the British leaving the last major strong hold in the American colonies.”
August 11, 2016 Interview	

In Richard’s mind, not discussing the roles of Lafayette, Clinton, and Howe would be “kind of like talking about Mohammad Ali without discussing Joe Frazier”

(August 11, 2016 interview). For Richard, this goes back to the idea of painting a picture for the students. Richard went on to justify the inclusion of these three men by stating, “Basically, I use these guys to help history come alive for my students; these were real people, not just someone to read about” (August 11, 2016 interview). To Richard, these men are very important when studying the American Revolution. However, Richard did not clearly express to his students the reasons for their inclusion the way he did for me. In this particular case, it appears that Richard had clearly ascribed historical significance using the criteria of importance and relevance, but did not clearly share this process with students. Rather, he talked about their roles in the Revolution prior to moving on without discussing why he included them. This example helps to illustrate the autonomy that Richard does have in curricular and instructional decision-making; Richard still has enough autonomy to fill in what he perceives as being gaps in the information. Additionally, this also helps to illustrate the reality that although Richard was able to articulate to me the significance of these men to the study of the Revolutionary War, he did not emphasize them as much to the students. This may have been due to the pace of the unit or it could be that Richard thought he did make clear to the students their significance to the war.

In addition to completing a survey about the five most important people to be taught during this unit, he was also asked to complete a survey about the fifteen most important things/stuff to be taught during the unit. It was not surprising to see that the rationale for the inclusion of these fifteen things/stuff was that they were included in the Standards of Learning. However, even though Richard believed that all of these items were included in the standards, several were not (See Figure 15).

Figure 15. What are the 15 most significant “things” “stuff” that must be taught in this particular unit?

Key thing/stuff/knowledge/skill/ understandings (names and dates)	Rationale for inclusion
1. French and Indian War Debt	Caused the Revolution/SOLs
2. No taxation without representation	Caused the Revolution/SOLs
3. Lexington/Concord	It is in the SOLs
4. Valley Forge	It is in the SOLs
5. Princeton	It is in the SOLs
6. Battle of Saratoga	It is in the SOLs
7. Battle of Yorktown	It is in the SOLs
8. French Assistance	It is in the SOLs
9. Declaration of Independence	It is in the SOLs
10. Common Sense	It is in the SOLs
11. Battle of New York City	It is in the SOLs
12. Loyalists Vs. Tories	It is in the SOLs
13. Neutrals	It is in the SOLs
14. Patriots	It is in the SOLs
15. Boston Massacre and Boston Tea Party	It is in the SOLs

*Not specifically mentioned in the Standards of Learning

After searching through the Standards of Learning, it was discovered that Valley Forge, Princeton, Saratoga, and the Battle of New York City were not included.

Actually, the only battle specifically mentioned in the standards was the Battle of Yorktown. However, Valley Forge, Princeton, Saratoga, and the Battle of New York City were all present in the ancillary materials. When questioned about this, Richard admitted that this might be a case where in his mind he may have blended the information from the ancillary materials with the Standards of Learning. The fact that Richard was blending what the S.O.Ls outlined as part of the essential knowledge and the information in the ancillary material demonstrates two aspects of Richard’s curricular planning: Richard is not as well-versed with the specifics of the essential knowledge in the S.O.Ls and the reliance on the ancillary material to drive curricular decision-making. Richard

admitted that he often plans out his units using the sections and chapters of the textbook and ancillary materials to determine what to teach. Richard believes the textbook materials do a good job of covering the S.O.Ls. To this point, Richard commented, “Generally speaking, the textbook I use does an adequate job of covering the S.O.Ls. So I know the S.O.Ls are covered, I can then chunk the information and plan accordingly for my pacing” (September 25, 2015 interview). It appears that Richard views the information found in the textbook as being historically significant, not because he has personally determined its significance, but because the textbook publishers have. Additionally, Richard feels confident that the textbook and ancillary materials cover the information students will be responsible for on the end-of-course test.

One specific example of Richard blending the standards with the content from the ancillary materials was the fact that Richard expressed multiple times that he disagreed with the Battle of Saratoga being considered the turning point in the war. He attributed this to the Standards of Learning⁷; however, it was the ancillary materials that specifically mentioned Saratoga as the turning point of the war. When asked if he may have attributed this battle to the standards because he has taught this course many years and has been using the same textbook and ancillary materials⁸, he responded, “Yes, I guess I haven’t changed that part of my mindset since then” (February 5, 2016 interview). This example just illustrates the significance that the textbook and accompanying ancillary materials have on Richard’s curricular-instructional decision-making processes. This was in part due to the fact that Richard openly admitted that he did not frequently look to the

⁷ The Battle of Saratoga was not specifically mentioned in the current or earlier Standards of Learning documents from 1995, 2001, and 2008 (VDOE Website).

⁸ Richard believes the book and ancillary materials he uses were adopted approximately in 2003.

standards when planning and implementing units of instruction. Another reason for the blending of information between the S.O.L standards and the textbook ancillary materials may be because Richard has been using the same materials for over a decade. Using the same materials year in and year out, Richard has not been forced to go back and critically evaluate the resources he chooses to include into his daily activities.

How tightly aligned are a veteran teacher’s conceptions and perceptions of the purpose, nature and utility of history as a school subject with their observed pedagogical practices?

An account of the classroom observations. Throughout the course of the classroom observations, Richard taught using very traditional pedagogy (See Figure 16). Even though he incorporated time for students to participate in classroom discussions, Richard’s class was still very much teacher directed. Richard attempted to make sure that students had an opportunity to “read it, hear it, and see it” every lesson of the unit, thus creating an instructional routine for the students.

Figure 16. Field notes from a classroom observation

Field Notes 10/5
<ol style="list-style-type: none">1) At the beginning of class, Richard asks if the students have any questions on reading study guides 4.2 and 4.32) Richard introduces the class to what the plan is for the day<ol style="list-style-type: none">a) Students will be beginning to learn about the Revolutionary War3) The graphic organizers are projected on the board<ol style="list-style-type: none">a) Richard explains the organizers and goes back and reviewsb) Richard discusses Lexington and Concord: “SOLs call it a battle, but it was a murder scene. But make sure to know the SOLs call it a battle.”4) Teacher directed instruction while going over the reading study guide 4.2<ol style="list-style-type: none">a) Richard goes over the terms to know (vocab)5) Richard goes over the 5 major events the students need know about (New York, Trenton, Saratoga, Valley Forge, and Germantown)<ol style="list-style-type: none">a) Richard tells the students, “Yes, it is more than you need to know for the SOL, but you need to understand them to know what happens.”b) “SOL says Saratoga is the turning point (the French enter).”c) Richard argues that Trenton is the turning point because if Trenton didn’t occur, Saratoga would have been possible. “For the SOL test, know that Saratoga was the turning point. As an intelligent citizen of America, Trenton was the turning point.”

- 6) Richard tells the kids he used to reenact for his classes, but due to the SOL and the pacing, it isn't possible to do until after the SOL test in May.
- 7) Richard puts a frame up on the promethean board (a note taking form)
 - a) Richard had students copy down the information while he talked about the information
- 8) After the students finished copying down the information, two short video clips were shown.
 - a) clip 1: loading and firing a musket
 - b) clip 2: loading and firing a canon
- 9) Richard began to show the movie "The Crossing" (the movie showed the colonial army commandeering boats, camp life, George Washington and his staff, and going to Trenton)
 - a) students had a worksheet with questions to answer while watching the film during the film, Richard added comments to help add to the story

Each day, Richard would post the learning target for the day as well as an agenda for that day's lesson on the board. What I found interesting was that Richard used the same learning target for the entire unit. When asked about the practice or writing broad objectives, Richard commented that, "Because the objectives are broad, I don't have to rewrite them everyday" (September 30, interview). This practice seemed to be more about convenience than pedagogy. When planning out the unit, Richard uses the textbook as a framework to plan each lesson. Richard commented,

I usually don't do more than two sections in a chapter a day, simply because it doesn't fit in with my agenda. If you get more than five or six things, you get it done, then they either got to do it for homework or you've got to come back and pick it up the next day. I definitely look at how long it is in the textbook.

Generally speaking, the textbook I use in history does an adequate job of covering the S.O.Ls. (September 25, 2015, interview)

By using the textbook and ancillary materials, Richard framed out each lesson, maintaining consistency from day to day and establishing daily classroom routines.

Instructionally, Richard followed that same general outline for each class.

Richard said that he attempts to have the students "see it, hear it, and read it." Richard relied heavily on the reading study guides as a way for students to read history. Richard

liked to frame out each lesson using the reading study guides as an anchor. He believed that the reading study guides allowed for students to get background information quickly, allowing for more time to be devoted to Richard telling stories and showing video clips (See Table 5).

Once students were finished with the reading study guides, Richard would then go over them with the students. Often during this time, Richard would include some sort of historical narrative to help make sense of the new information. Richard is a great storyteller and his passion for this time period became very apparent when he would tell historical stories to the students. In order to illustrate the points that Richard made to the students, he included several videos and video clips. Over the course of the unit, Richard showed three video clips and two full movies. So even though Richard was concerned about pacing, he felt that it was important enough for the students to see the films in order to better understand the unit.

Table 5. Classroom observation table

Day	Learning Targets & SOLs	Agenda/Activities	Nature of Instruction
1	<p>1) Students will analyze the causes of the Revolution and understand the important events of the war, as well as the roles played by significant individuals</p> <p>SOLs: Standard VUS 4c: The student will demonstrate knowledge of events and issues of the Revolutionary War Period by: Describing the political differences among the colonists concerning separation from Great Britain</p>	<p>1) Reading Study Guide 4.1 2) Sequence Chart 3) Political Idea: Fill in the chart 4) Animation of Lexington & Concord 5) ‘Story of the Patriot’ with handout due after the movie</p>	<ul style="list-style-type: none"> Richard attempts to show connections from the past to the present. Students have many opportunities to ask questions, but instruction was mainly teacher directed. A video clip and a movie were used to supplement instruction
2	<p>1) Students will analyze the causes of the revolution, understand the important events of the war, as well as the roles played by significant individuals</p>	<p>1) Reading: Boston Massacre 2) Declaration of Independence rewrite 3) Reading study guides 4.2 and 4.3</p>	<ul style="list-style-type: none"> Richard had students read multiple accounts about the Boston Massacre. Asked students what the significance of

	<p>SOLs: Standard VUS 4a, 4b, and 4c: The student will demonstrate knowledge of events and issues of the Revolutionary War Period by:</p> <ul style="list-style-type: none"> Analyzing how the political ideas of John Locke and those expressed in <i>Common Sense</i> helped shape the Declaration of Independence Evaluating how key principles in the Declaration of Independence grew in importance to become unifying ideas of American democracy Describing the political differences among the colonists concerning separation from Great Britain 	4) Graphic organizer	<p>this event was. A student answered and then Richard finished the thought.</p> <ul style="list-style-type: none"> Richard had students use primary and secondary sources to draw conclusions about the Boston Massacre. Instruction was still mostly teacher driven with students answering Richard's questions. The assignments were collected.
3	<p>1) Students will analyze the causes of the revolution, understand the important events of the war, as well as the roles played by significant individuals</p> <p>SOLs: Standard VUS 4a and 4c: The student will demonstrate knowledge of events and issues of the Revolutionary War Period by:</p> <ul style="list-style-type: none"> Analyzing how the political ideas of John Locke and those expressed in <i>Common Sense</i> helped shape the Declaration of Independence Describing the political differences among the colonists concerning separation from Great Britain 	<ol style="list-style-type: none"> Review Reading Study Guides 4.2 and 4.3 Frame: Continental and British armies strengths and weaknesses Movie: The Crossing 	<ul style="list-style-type: none"> Much of the instruction was teacher directed, going over the reading study guides and notes on the Continental and British armies strengths and weaknesses. Richard used 'The Crossing' to supplement information about the winter at Valley Forge.
4	<p>1) Students will analyze the causes of the revolution, understand the important events of the war, as well as the roles played by significant individuals</p> <p>SOLs: Standard VUS 4d: The student will demonstrate knowledge of events and issues of the Revolutionary War Period by: Analyzing reasons for colonial victory in the Revolutionary War</p>	<ol style="list-style-type: none"> Finish watching "The Crossing" Complete Reading Study Guide 4.4 View the siege of Yorktown map work Review for the test next block 	<ul style="list-style-type: none"> Richard answered questions about the movie. Students worked on a worksheet and then Richard called on students to answer the question. Richard had students begin to work on the study guide in class. Richard walked around and answered questions.
5	N/A	Took the Revolutionary War Test	N/A
6	1) Students will analyze the causes of the revolution, understand the	Computer Scavenger Hunt. Answer the questions in	<ul style="list-style-type: none"> Students worked with partners to complete

	important events of the war, as well as the roles played by significant individuals	sentence form on a separate sheet of paper	the scavenger hunt. Richard's role was more a facilitator, answering student questions.
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It appeared that the only major deviation from the unit plan was adding an additional day after the unit test. Originally, Richard had planned to include the Revolutionary War scavenger hunt activity, but decided to drop it, citing, “I’ve dropped the scavenger hunt that I usually do during this unit because of pacing and where the other people in my C.L.T are, I’m kind of behind” (October 1, 2015, interview). However, due to P.S.A.T testing, Richard’s 3rd block class got ahead of the rest of his classes. As a way to keep all of his classes at the same point, with regards to instruction, he decided to put the scavenger hunt back into the unit. Richard rationalized this decision by stating,

Because of the P.S.A.Ts, if I hadn’t added the scavenger hunt back in, I would’ve had my A days way ahead of my B days and that messes with me. And if you mess with me, I get out of my stride, I don’t do as good of a job, therefore, the kids are not as successful and I don’t want to do that. (November 10, 2015, interview)

This is an example where personal pacing concerns drove Richard’s instructional decision-making. Richard made the conscious decision to add a day to the unit for one of his classes so that they could all remain on the same schedule.

When analyzing the activity through the lens of the S.O.Ls, much of the information students were to find during the scavenger hunt was not directly related to the standards (See Appendix F). More specifically, of the thirty-four questions, only ten were directly linked to the standards of learning. Much of the information sought went

into much more specific details about the Revolutionary War period than the state of Virginia would test on. In this instance, Richard's inclusion of this activity served two purposes. First, it allowed his 3rd block class to stay on pace with his other history classes. Second, it connected with Richard's personal belief that students needed to know more about the Revolutionary War time period than what the state of Virginia outlined.

Richard's curricular and instructional decision-making. When asked what came to his mind when he hears the term curriculum, Richard commented, "Curriculum would probably be the things necessary for the kids to have in your class in order to pass the S.O.L and to do well and become a better citizen" (February 5, 2016, interview).

Richard went on to say,

For this U.S. history course, I think that the S.O.Ls and the curriculum are interchangeable simply because that is what it is all about. It didn't use to be that way. When I first started, the curriculum was the guideline, but if you didn't get through it for the whole year or if you vary to some degree or other, that's fine as long as the kids are learning more about history than what they knew when they came in. (February 5, 2016 interview)

Richard's comment about the curriculum helps to explain why he often times deferred to the Standards of Learning at the onset of any conversation regarding curricular inquiries. Since Richard viewed the S.O.Ls and the term curriculum interchangeably, the S.O.Ls became his main justification for inclusion. Ironically, Richard stated that he very rarely consults the Standards of Learning to ensure that all of the essential knowledge was being covered. From a researchers perspective, I could not definitively ascertain whether this was what Richard believe drove all of his decisions or whether the truth was much more

complicated. On several occasions throughout the interviews, Richard thanked me for allowing him to participate in this study because it was making him think about things he had not thought about in years. Richard admitted that he had not thought this much about the individual decisions he was making in the classroom with regards to curricular and instructional decisions for a very long time.

In order to gain a better understanding of what Richard believed to be the most significant influences on his curricular and instructional decisions, I constructed a Survey of Influence to have Richard complete following the conclusion of the unit. The survey of influence included influences that Richard had mentioned or influences I had observed. The purpose of this survey was to determine if what Richard believed was most influential over his decision-making matched up with what I observed during this study. To complete the survey, Richard was asked to rank in order of importance seven possible influences⁹ and then discuss any other influences that were not included on the list (See Table 6)

Table 6. Survey of influence

Rank	Influence	Rationale for Ranking
1	Individual standards of learning	This is essential for the students to know as the entire SOL end of course test is based on this information. Students cannot graduate without passing the end of course test.
2	Textbook and Ancillary Materials	These are necessary tools provided by the county to help/assist in student mastery of SOL content
3	Time Constraints	As content changes from year to year, instructors must be flexible to add and subtract topics from history. Realistically, you have 162 days to complete the teaching of over 524 years of history. Instructors must learn from the SOL test what topics are receiving more attention.
4	Personal Interest	Each history teacher has their eras/topics that highly interest them and we must guard against spending too much time on our favorite eras.

⁹ The seven influence factors were given to Richard as well as an “other” option to allow Richard to add any influences I may have missed or overlooked.

5	Common Learning Teams	Are only useful in assisting in pacing of the course.
6	Students and Student Interest	Students tend to be interested in more modern history so I try to start the 20 th century at the beginning of the second semester.
7	End of Course Test	SOLs drive everything we do in the course.
Other	Team Teacher	Has or should have a tremendous amount of influence in how material is presented, taught. Should actively be involved in all aspects of planning and teaching course so as to ensure that all students' needs are met.

Richard's responses were mostly in line with what was observed in the classroom with the exception of the End of Course test. He placed the least emphasis on this factor when rating factors, but states in his reasoning "SOLs drive everything we do in the course." Interestingly, Richard placed the actual mandated standards and the subsequent end-of-course test on opposite ends of the influence spectrum. In reality, the standards and the actual end-of-course test are interrelated to the point that their influence cannot be individually analyzed. One example of how the standards and end-of-course test influenced his decision was with regards to Lexington and Concord. After discussing the events with his students, he ended by saying, "The S.O.Ls call it a battle, but it was a murder scene. But make sure to know the S.O.Ls call it a battle" (October 5, 2015 field notes). Richard wanted students to know how the events would be worded on the end-of-course test. Furthermore, when questioned about why he explains his thought processes to students, Richard commented,

If you look at the S.O.Ls, and I have only kind of glanced at them recently, I have not gone over them page by page, but the biggest ones [battles] are Lexington and Concord, started the war, and Yorktown, which basically ends the war. And there is not, and so what, they had two battles in four, five, six years, whatever? That's

not realistic either. So yeah, we'll touch on why I bring some in and why I leave others out. (September 29, 2015 interview)

This was a case where Richard's perceptions of the event differed from the standards.

Richard gave his personal views about Lexington and Concord, but made sure that students understood how the events would be presented on the end-of-course test.

Examples such as this help to illustrate the power and influence mandated standards and accompanying end-of-course tests have on teachers like Richard. Through the course of observing this unit, it seems that in reality, the end-of-course test should possibly be ranked in line with Individual Standards of Learning.

Although Richard had a lot of autonomy over the day-to-day implementation of the unit, he still felt constricted by both the standards and the end-of-course test. Richard commented,

If I spent as much time as I'd like to with it [the Revolutionary time period], I probably wouldn't finish the curriculum by the time of the S.O.L test. Because in order to do that, I would have to almost drop another unit somewhere else.

(October 2, 2015 interview)

To this end, Thornton (1991) concludes, "Despite the central role of teachers in planning the intended curriculum, it appears that many teachers do not view themselves as key players in the determination of the curriculum" (p. 241). Because Richard did not feel like he had any autonomy over the curriculum prior to the end-of-course test, he did not actively engage in constructing and implementing criteria for historical significance. Rather, he relied heavily on the ancillary materials to complete the historical narrative. However, in reality, Richard had the ability to include information that he personally found significant to the study of the American Revolutionary War. This is not to say that

Richard did not have a set of criteria to help determine historical significance, but for Richard it appeared to occur more subconsciously than consciously. So if Richard was not consciously or consistently making curricular decisions using his own criteria for historical significance, what factors were determining what he chose to teach and how he would teach that material?

S.O.Ls and S.O.L testing. Before discussing the influences of pacing, personal factors, and the role of ancillary materials, the influence that the official standards and the accompanying testing must be acknowledge and explored within the context of Richard's experience. Even though Richard rarely consults the official curriculum standards, he reports that they have a tremendous influence over his curricular and instructional decisions. Richard sums this reality up by stating, "The S.O.L standardized test and the curriculum it covers is a huge driving force in everything I do" (September 25, 2015 interview). To an extent, Richard feels that he is teaching the S.O.Ls instead of teaching history. Similarly, Grant (2007) posits, "some novice teachers and their veteran peers feel pressured to undercut their pedagogical goals in reaction to state test pressures" (p. 250). In the case of Richard, the pressure comes from the fact that the S.O.L tests are tied directly into graduation requirements for the students. Richard feels that in order to make sure that his students pass the end of course test, it is sometimes at the expense of students seeing the whole picture. This is especially true when he feels the stresses of pacing. Richard commented,

If it does become a problem [pacing], I basically revert back to a college style where I will throw notes up on the board and say this is what you've got to know and while you are copying those down, I am going to talk about these things in a

little more detail. It is watered-down; it is strictly only the standards when you get behind. I mean, that is all you can do. (September 5, 2015 interview)

He views the S.O.L standards as a skeleton and it is his job to fill in the rest. However, Richard made it clear that the breadth of the S.O.L standards makes it so that some areas have to be rushed in order to finish the curriculum prior to the end of course test that takes place in mid to late May every year.

In order to make sure that Richard is hitting all of the essential information that will be tested, he uses released test items from previous S.O.L tests and the structure of the textbook ancillary materials to guide his lesson planning. However, Richard does not consult the released curriculum framework when planning out the units or the individual lesson plans. On several occasions, Richard noted that since he has been teaching the course so long, he feels that he has a pretty good understanding of what things the students need to know in order to pass the test. Richard reinforces this sentiment by commenting, “My number one goal is to get the kids to pass the S.O.L test at the end of the year. It’s got to be, that is just the way the State says it has to be” (November 10, 2015 Interview). Additionally, Richard uses released questions on his unit tests and uses S.O.L styled questions to help prepare students not only for the content, but the style of question as well. Richard notes that the students not only need to learn the content, but also how to dissect the questions on the end of course test. Richard believes that in order for students to be truly prepared for the end-of-course test, they must also be confident in the mechanics of answering S.O.L styled questions.

When asked about the role of standards in the planning process, Richard said that they are the driving force. However, it must be noted, that Richard did not regularly consult with the released standards while planning. At this point in his career, much of

his planning consisted of reviewing what he has done in the past and slightly modifying it to adjust for any changes in pacing or the common unit test that have been constructed by his C.L.T. To this end, Richard expressed his frustrations with this process by stating, “The C.L.T stuff of planning long range is killing me because it changes so many damn times, its like why did I do it [plan] the first time” (September 25, 2015 interview). However, even with these frustrations, Richard knows that there are certain benchmarks he has to hit in order to finish the curriculum prior to the end-of-course test. He explained, “by Christmas we need to be at the Civil War. By the end of January you need to be through progressives and imperialism to get ready to start World War I” (September 25, 2015 interview).

When analyzing the Revolutionary War unit test, the influence of the standards is apparent (See Appendix E). The test contained a total of fifty questions, made up of both multiple-choice and matching. Of the fifty questions, there were only six questions not specifically mentioned in the standards (See Table 7). An example of a question that addressed information not specifically included in the standards would be:

- Which description below best describes the Hessians?
- a. Name of the fort built by George Washington against the French
 - b. German mercenaries employed by the British
 - c. German mercenaries employed by the French
 - d. Nickname the colonists gave the King of England

Even though the Hessians are not mentioned in the SOLs, Richard taught the students who the Hessians were while watching the film, “The Crossing.” For Richard, it was important for the students to know about the Hessians and how their presence influenced Washington’s decision to attack. So even though there were some questions included on the unit assessment that did not align specifically with the standards, the majority of the test was linked directly to the standards.

Table 7. Standard analysis of the Revolutionary War unit test

Revolutionary War Test Question Analysis	
Standard	# Of questions on the test
a) Analyzing how the political ideas of John Locke and those expressed in <i>Common Sense</i> helped shape the Declaration of Independence	11
b) Evaluating how key principles in the Declaration of Independence grew in importance to become unifying ideas of American democracy	1
c) Describing the political differences among the colonists concerning separation from Great Britain	23
d) Analyzing reasons for colonial victory in the Revolutionary War	5
Other SOL standards not linked specifically to the Revolutionary War:	
a. VAUS 2: The student will describe how early European exploration and colonization resulted in cultural interactions among Europeans, Africans, and American Indians.	1
b. VAUS 3: The student will describe how the values and institutions of European economic and political life took root in the colonies and how slavery reshaped European and African life in the Americas.	3
Not specifically associated with any of the Standards	6
Total Questions:	50

When asked about the role that the S.O.Ls and the state test have on his curricular and instructional decision-making, Richard replied, “The S.O.L standardized test and the curriculum it covers is a huge driving force in everything that I do” (September 25, 2015 interview). He went on to say, “the U.S. history course is now driven by the S.O.L test” (September 25, 2015 interview). It would be easy to take Richard at his word and conclude that the S.O.Ls and the end-of-course test are the greatest influencing factors over his curricular and instructional decision-making. However, through the course of this research into the influences affecting Richard’s decision-making, the process was much more nuanced. To forgo discussing other influences would be to over simplify the process, thus retarding any meaningful discussions surrounding curricular and instructional decision-making. Whether real or perceived, the Standards of Learning, at

least to some extent, influenced Richard's decision-making in the classroom. Richard had a good sense of what information his students needed to know to pass the S.O.L test at the end of the year and he wanted to make sure that they were successful. However, there were other influencing factors that were not as prominent as the Standards of Learning. Through the course of this research, three additional layers appeared multiple times as key influences over the curricular and instructional decisions by Richard. The three areas that appeared to be the greatest influences over Richards' curricular and instructional decision-making were the role of textbooks and ancillary materials, pacing, and personal factors.

Textbooks and ancillary materials. A major influencing factor discovered through this research was the presence of ancillary materials. In the case of Richard, the ancillary materials I am referring to were part of a larger textbook adoption that took place over a decade ago. The materials in question that Richard relied heavily on were the reading guides (See Appendix A). These ancillary reading guides were produced by the textbook manufacturer and in essence were an abridged version of the textbook. Instead of having the students read the chapters of the textbook, Richard relied heavily on the ancillary guides. Each section of the textbook was broken down into one to two paragraphs with a reading question following. When asked why he uses the ancillary reading guides, Richard replied, "What I found by using the reading study guides, it gives me more flexibility" (February 5, 2016 interview). For Richard, the ancillary reading guides provided an avenue for students to interact with the text in a more efficient, timely manner; thus, allowing him more time to incorporate the information and activities that he found to be significant.

At the beginning of the unit, students were given a packet of ancillary reading guides for the unit of instruction (see Figure 17). In total, there were four sections in the chapter on the American Revolutionary War.

Figure 17: Example of the reading study guides (used with permission of Houghton Mifflin Harcourt)

Key Terms and Definitions

Section Summary

Guiding Question

Summary Review Question

Since Richard was a self-admitted “textbook guy,” I inquired as to why he was not using the actual textbook with his students. Richard explained,

I started out with textbooks kids could read and were able to read as it progressed, well, okay, they have to have higher reading levels, so the textbook gets harder. They go from an on grade level to a college level sometimes and then they say, well, its too hard for them and then if they are not going to give me a textbook they can read, so I go to supplemental material for the facts for the past five years or so. And I know that the county buys that and it’s a wonderful resource,

particularly the ancillary materials that go with it, but if the reading level is too high, then why do you use it. (November 10, 2015 interview)

In actuality, the incorporation of the ancillary reading guides may have more to do with control. Richard had the students read the guides in class as a way to build a foundation for the rest of the lesson. In essence, it gave students a quick snapshot of the various topics, allowing Richard to supplement the guides with other materials such as readings and videos.

Richard believes that the reading study guides allow him to more easily chunk the material for students while at the same time giving him some flexibility with bringing in outside sources to complement the reading guides. Additionally, since the reading abilities of his students are so diverse, he felt that the ancillary reading guides bridge the gaps of his students reading proficiencies. Richard went on to comment,

The ancillary reading guides influence what I teach because it comes with readings that the kids are willing to do, it's short, it's sweet, and it's to the point. It covers the same stuff the textbook does; it just hits the highlights without all the extra fluff. Plus it gives them a visual aide to be able to help them, for visual learners about what you're talk about. And it ties into the thing I always try to do with my lessons. I try to plan three things into each lesson: the kids will see the information, the kids will hear the information, and they will write about the information. (November 10, 2015 interview)

In a way, the ancillary guides framed the unit more so than the actual curriculum framework.

In Richard’s mind, the ancillary reading guides killed multiple birds with a single stone. From a content perspective, the reading guides delivered some of the S.O.L essential knowledge in what Richard viewed as a digestible format (See Table 8).

Table 8. Standards analysis of the ancillary reading guides

Standard VUS. 4: The student will demonstrate knowledge of events and issues of the Revolutionary Period by:				
Description of Item	a) Analyzing how the political ideas of John Locke and those expressed in <i>Common Sense</i> helped shape the Declaration of Independence	b) Evaluating how key principles in the Declaration of Independence grew in importance to become unifying ideas of American democracy	c) Describing the political differences among the colonists concerning separation from Great Britain	d) Analyzing reasons for colonial victory in the Revolutionary War
Reading Study Guide: Chapter 4, Section 1: The Stirrings of Rebellion			X	
Reading Study Guide: Chapter 4, Section 2: Ideas Help Start a Revolution	X		X	
Reading Study Guide: Chapter 4, Section 3: Struggling Toward Saratoga				
Reading Study Guide: Chapter 4, Section 4: Winning the War				X

For the most part, the reading guides address three of the four components of the standards related to the Revolutionary War. Additionally, the reading guides went into greater depth than the S.O.L essential knowledge, helping history to be more of a linear story than a series of unrelated facts. Aside from just introducing information to the students, the reading guides also helped Richard with pacing. Knowing that he did not have the amount of time to spend on the Revolutionary War period he would have liked, the reading guides were quick overviews of background information that Richard could go back and fills in the gaps. For Richard, the ancillary reading guides provided enough

background information to hook the students and then he could focus on what he found to be significant when it came to the Revolutionary War.

Although using the ancillary reading guides helped to get students the foundational information needed, one potential downside was that it appears that over the years, Richard had begun to conflate the information in the ancillary reading guides with the Standards of Learning. This is not to say that there is not overlap, but on several occasions, Richard attributed information to the Standards of Learning, when in actuality they should have be attributed to the reading guides. In Richard's mind, the S.O.L standards and the ancillary reading guides have become blended, making it very difficult to separate the two.

Pacing: Throughout the course of interviewing and observing Richard, he consistently bemoaned the amount of time he would be able to dedicate to the foundational period of the United States. Richard felt constrained because of the agreed upon pacing of his common learning team as well as ensuring that he finished the official curriculum prior to the State testing date. According to the unit plan provided by Richard, the unit was to last a total of five blocks, the fifth block being the unit test. Although Richard was already behind the pacing guide of his common learning team¹⁰, he still allocated one to two additional blocks onto this unit above the recommended pacing by than his common learning team. Richard justified his decision by stating:

With me doing it as long as I've been doing it, its just the time crunch thing is something that is more extraneous because I know further through the year there are other places where my CLT will slow down like I do here and they'll spend

¹⁰ Richard stated that the rest of his CLT was planning on finishing the Revolutionary War unit in three blocks.

much more time on for example, the Gilded Age or whatever it happens to be. And then I will catch up and in some cases surpass them because they choose to spend their time there, where I choose to spend it here. (September 30, 2015 interview)

On one hand, Richard felt time constraints with this unit; however, his instructional decision-making did not always align with his concern over pacing. Because Richard had taught this course for so many years, he knew exactly where he could “buy back” time if necessary later in the year. Richard’s perceived stress over the pacing of the unit had more to do with the fact that in a perfect world, he would have the time to spend an entire semester on the Revolutionary War period. With this mindset, adding several blocks would not be able to fill the instructional void Richard perceived. Richard stated, “I could spend a semester on just this period in American history and still not have enough time, cause there are so many different things I could do. But you know, you’ve got to stay within the framework of the curriculum” (September 30, 2015 interview). Richard feels that it is important that the students see the whole picture as well as connecting history to their own lives and he feels that the SOLs do not adequately accomplish this. Richard commented,

One decision we will have to make somewhere down the line in this unit is the SOLs say the turning point in the war is Saratoga, because that is what convinces the French to come in and with French aid we were able to beat the British. But one of the other things as a historian, to me, if I don’t touch on Princeton and Trenton, where Washington won his first battle and saved his own army, the American army doesn’t get to Saratoga to win that battle. (September 30, 2015 interview)

Throughout the unit, instructional decisions had to be made and modified in order to maintain some adherence to the pace set by the common learning team. Even though Richard had already determined that he was going to spend more time on this unit than the rest of his C.L.T, he understood the optics if he got too far behind. In a way, Richard understood how much wiggle room he had to maintain the appearance of commonality with the C.L.T while at the same time doing what he wanted to do. An example of this balancing act occurred during the second block of the unit. The original plan had been for the students to read a primary source on the Boston Tea Party and then discuss what had occurred. Richard had wanted the students to read the excerpt and then create a cause and effect diagram of the Boston Tea Party from this particular eyewitness account. Prior to the class beginning, Richard let me know that he had decided to forgo this activity with the students. When asked about why he made the decision to leave out this activity, Richard responded, “The Boston Tea Party, we’ve covered it in the set of notes early on and really the only thing that they have to know about that is that it was a protest over tea. We covered that and so I thought that would be the easiest activity to drop” (October 2, 2015 interview). Richard made the determination that since the class had already covered most of the information, he would be better served to remove the activity and allocate that time to other aspects of the unit. By removing the Boston Tea Party primary source analysis, Richard was able to complete an in-depth analysis of the Boston Massacre as well as completing an activity on the Declaration of Independence (See Appendix D and Appendix E). In this last minute decision, Richard felt that the two other activities might have more of an impact on the students understanding the time period. Richard believed it was more economical to have the students go more in depth with the Boston Massacre

and the Declaration of Independence, than to take the time to spend on the Boston Tea Party.

Richard admitted that these types of instructional decisions occur a lot over the course of a school year. He explained that there were multiple reasons for this to occur. They included sometimes spending too much time in one area so as to have to reduce time spent in other areas, missing class time due to administrative tasks (i.e. PSAT testing, fire drills, assemblies, etc.), and class time missed due to inclement weather. When it is all said and done, the concept of pacing drove a lot of Richard's curricular and instructional decisions. However, the concept of pacing does not fit neatly into one of Grant's (1996, 2003, 2007) typologies. In fact, the concept of pacing has the ability to transcend all three typologies simultaneously.

In the previous example with Richard deciding to forgo an activity on the Boston Tea Party so that he could include activities on the Boston Massacre and the Declaration of Independence demonstrates the omnipresent concerns of pacing. In one sense, Richard wanted to originally include the Boston Tea Party activity in the instruction because he felt it would help students to better understand the time leading up to the Revolutionary War. For Richard, this was personally important in his mind for students to have this great understanding. However, at the same moment, Richard was feeling pacing pressures from both his C.L.T as well as the Standards themselves. In the case of the C.L.T, Richard knew exactly how far he could be behind without there being problems with the rest of his group. With the actual standards, Richard, although he disagreed over the emphasis, understood that the State of Virginia takes a very superficial view of the Revolutionary time period. Richard felt that for the purpose the end-of-course test, he could sacrifice the extra activity he had planned on the Boston Tea Party.

Even though Richard spent more time on the Revolutionary War period than anyone else on his common learning team, he still wished he had been able to spend even more time. When asked about how he feels to shorten the Revolutionary War unit, he responded, “I get disappointed because I think this is really an important part of the foundation of what our country is and our kids need to know it” (October 8, 2015 interview). Although in an ideal world, Richard would have had more time to spend on this unit, he understands that the students will be assessed on the content of the entire course, therefore forcing him to make curricular-instructional decisions that will help the students be successful on the end of course test.

Richard’s decision to add time to the Revolutionary War unit may have implications later in the school year. Richard acknowledged multiple times that in terms of pacing, there are times when you have to rob Peter to pay Paul. When discussing pacing issues from previous year, Richard commented,

A couple of years ago I did papa Bush, Clinton, son Bush, and Obama in two blocks because that was all I had left. I had been so worried about focusing on everything else, I hadn’t been as focused on the more modern stuff. How much time do you spend when you are only getting six questions on an SOL? And there is no way that I am going to know which six questions it is. So it gets to be, I don’t want to say drill and kill, but that is kind of what we are talking about.

(February 5, 2016 interview)

In this case, Richard’s pacing for the course was heavily influenced by his love of the Revolutionary War period. In fact, even though Richard stressed over the constraints of the pacing of this course, his personal love for this time period influenced not only the pacing of this unit, but other units as well. Richard justifies his pacing decisions with

regards to the Revolutionary War because he feels that students tend to come into his class more knowledgeable about modern U.S. History, allowing him to brush over it in favor of adding more time to the foundational period of the United States.

Personal factors. Richard acknowledges that the SOLs are just the starting point in planning a unit and then he has to fill in the rest to make the story whole. Richard went further by stating, “I modify to meet them (the SOLs), but at the same time, I also think there are things that the kids need to know outside of the SOLs that it is important for them to keep this ongoing story of America together” (October 1, 2015 interview). It is this mindset that heavily influences Richard’s instructional decision-making practices throughout the unit. Within the scope of personal factors, the two areas that influence Richard’s curricular-instructional decision-making the most are interest and experience. Richard does not only view himself as an educator, but he also sees himself as a historian. He sees his job as not only transmitting historical knowledge, but to attempt to get students to become passionate about history. Over the course of Richard’s teaching career, how history is taught has changed. Richard commented,

When I first started teaching, for the first 20 years, it was not as important that you cover all of the curriculum as it was for the kids to understand the major points of the curriculum. Today, you’ve got to cover everything and if the kids don’t get it, at some point you got to say oh well, I hope that’s not on the SOL.

As a historian, that bothers me. But as an educator, it is like what else can I do?

(September 25, 2015 interview)

Richard admitted that the historian vs. educator struggle is constantly playing out in his head as he plans his course. To this point, Richard stated, “history is an ongoing road in construction and I don’t think you can just do a little nugget here of an SOL and another

nugget here of an SOL and expect the kids to connect it, you’ve got to connect the whole story of America” (October 1, 2015 interview). However, at the end of the day, the students are expected to pass a standardized test consisting of sixty multiple-choice questions. Richard feels that when he first began teaching, it was more about helping students to become well-rounded citizens as opposed to preparing for a standardized test.

An example from this unit that exemplifies the internal struggle Richard felt as both an educator and historian centered on Valley Forge. Within the state provided curriculum framework, Valley Forge is not specifically mentioned (See Figure 18).

Figure 18: SOL standard VUS.4d

STANDARD VUS.4d

The student will demonstrate knowledge of events and issues of the Revolutionary Period by
d) analyzing reasons for colonial victory in the Revolutionary War.

Essential Understandings	Essential Questions	Essential Knowledge	Essential Skills
The American rebels won their independence because the British government grew tired of the struggle soon after the French agreed to help the Americans.	What factors contributed to the victory of the American rebels?	<p>Factors leading to colonial victory</p> <ul style="list-style-type: none"> • Diplomatic <ul style="list-style-type: none"> – Benjamin Franklin negotiated a Treaty of Alliance with France. – The war did not have popular support in Great Britain. • Military <ul style="list-style-type: none"> – George Washington, general of the American army, avoided any situation that threatened the destruction of his army, and his leadership kept the army together when defeat seemed inevitable. – Americans benefited from the presence of the French army and navy at the Battle of Yorktown, which ended the war with an American victory. 	<p>Formulate historical questions and defend findings, based on inquiry and interpretation. (VUS.1c)</p> <p>Develop perspectives of time and place. (VUS.1d)</p> <p>Apply geographic skills and reference sources to understand how relationships between humans and their environment have changed over time. (VUS.1g)</p>

Even though the essential question for this standard is “What factors contributed to the victory of the American rebels?” For Richard, the standards are too vague for students to be able to gain a true appreciation for the American Revolutionary War. However, the

VDOE clearly states on its website, “The Curriculum Framework serves as a guide for Standards of Learning assessment development; however, assessment items may not and should not be verbatim reflections of the information presented in the Curriculum Framework” (VDOE website). For Richard, the state provided Curriculum Framework is the official curriculum; however, the State of Virginia views its Curriculum Framework more as a blue print, allowing for individual teachers to include items not included in the official document.

Even though the curriculum framework did not specifically mention Valley Forge, Richard felt obligated to go into great detail about the significance of that winter. In class, Richard told the students of his experience traveling to Valley Forge during a summer break and the experiences of those staying there under General Washington. He wanted the students to realize the significance of Washington’s decision to go on the offensive. To help the students better understand the position of Washington and his army, Richard showed the students the movie “The Crossing.” Richard had the ability to show clips from the movie; however, he chose to show the entire film. When asked why he chose to show the entire movie as opposed to just showing a clip or two, he responded, “unless you see the progression of how Washington develops as a person and how his thought process progresses, you are not going to see how important he really was to the Revolution” (October 5, 2015 interview). To Richard, showing the entire film would give students a more complete understanding surrounding the historical significance of Valley Forge.

Even though Richard was concerned about the pacing of this unit, he felt that by showing the entire film, students would gain a better understanding of what was occurring at Valley Forge. This is an example of how Richard’s personal factors drove

his curricular and instructional decisions, going into much greater depth than what the Standards of Learning required. In Richard's mind, student needed to understand that, "Because Washington has been defeated so bad so many times and he has no money, he has no food, and little equipment for his guys, if he doesn't get a win before the end of the year when their enlistments run out, there is not an army to get to Saratoga or to get to Yorktown. And the SOLs don't talk about that" (October 1, 2015 interview). For Richard, his personal interest in Valley Forge as well as his belief that showing the entire movie would do a better job of creating visual context for the students overrode his concerns regarding pacing. So even though Richard commonly justified decisions regarding curricular and instructional decisions by citing the official standards, this example demonstrates that Richard had much more autonomy than he articulated to me in the interviews.

Common learning teams, students, team teachers, oh my! During the course of this research project, the topics of common learning teams, students, and team teachers came up from time to time with regards to curricular and instructional decision-making. However, during the course of this research, I did not observe any classes where Richard was team-teaching; therefore, I cannot definitively determine what if any impact Richard's team-teacher had on his curricular and instructional decisions. Through the course of observations and interviews, Richard did not appear to be heavily influenced by students. When asked about whether student influence Richard's curricular choices, he responded,

If you are tight on time about the only thing you do is, what I would tell them is thank you for your question, it's a great question, can you see me after class and

we can talk more about it and I'll write you a pass to the next class if need be, but is not one that I want to focus on today. (September 25, 2015 interview)

Even though students were asked to participate in class, much of their participation was through the practice of question and answer. An example of this occurred following the showing "Story of a Patriot." Students had a viewing guide that they were to complete as they watched the film (See Appendix B). Once the movie was over, students had the opportunity to ask questions with regard to the view guide, which would be collected and graded (October 1, 2015 field notes). This example helps to illustrate the point that this classroom was still very much a teacher-centered classroom, thus limiting some of the ability for students to influence Richard's instructional decisions. However, in planning, it appeared that Richard attempted to make historical connections for the students and their own lives. Even so, this was more of a passive activity for students. Throughout the unit, Richard attempted to connect the information from the unit to the student's personal lives. Although Richard presented many of the historical connections to the students, this demonstrates how important the concept of relevance was to Richard. Even though he did not directly use student input in his decisions, he did have his students in mind when making some of his decisions.

Of the three aforementioned potential influences, the factor that appeared to be the most influential over Richard's curricular and instructional decisions was that of the common learning teams. For Richard, this particular factor appeared to be more of an annoyance than anything else. Washington high school required that common learning teams have common summative assessment and to some extent common pacing. For Richard, this meant that he had to give the same test as the rest of his common learning team. In this case, it did influence Richard's curricular decisions to some extent because

the expectation was to backwards design the unit. However, Richard also would make minor modifications to the test without his common learning team knowing to include more questions specifically linked to the activities he did in his class. Richard justified this decision by saying that the common test was similar to the S.O.L test in that it did not go into much detail. By adding questions to the test, he felt as if his students needed to have a better understanding of the time period to do well. Richard felt that this was a reasonable compromise because he would still have the information needed for his C.L.T to analyze the results of the test and also go into greater depth while assessing the students.

The other area that the common learning team influenced Richard was with pacing. He commented several times that he would get “polite” reminders to keep up with the rest of the C.L.T. It was with the pacing where Richard demonstrated the most frustration over the role of the C.L.T. Richard expressed his frustration during our first interview prior to beginning the observations. He was frustrated because the school had scheduled the Emergency Response Plan (ERP) drill, causing a one-hour delay schedule to be implemented. Richard stated his frustrations by saying,

Because I have a test today, and we’ve got the ERP today, if the ERP goes longer than what they told us it was going to, I’m going to have kids who are going to be stressing because they don’t have enough time because they work slowly to finish the test. And so, if an evaluator comes in, they’re going to say “your kids didn’t know the material if they didn’t score well.” And I am going to say no, you can’t say that because the change in environment. Now some people would say, move the test back. I can’t move it back a day if I want to stay even when the C.L.T

and if I want to stay on the schedule to be able to have the curriculum done by the time the S.O.Ls come. (September 25, 2015 interview)

Had it not been for the persistent reminders for Richard to keep moving, he very well may have spent even more time on this unit. However, more often than not, Richard would find ways to extend the unit past that of his C.L.T. One specific example observed during the unit occurred after the unit test was given. During the course of the unit, the P.S.A.Ts were administered to all 9th, 10th, and 11th graders at Washington high school. This “disruption” to instruction led Richard to make an instructional decision to keep all of his “A” days classes on the same pacing. The class I was observing was not affected by the P.S.A.Ts and Richard did not want to move ahead of his earlier blocks that were affected. To accomplish this goal, Richard had his 3rd block class complete a Revolutionary War scavenger hunt. Although this activity did have some connections to the standards, it was used more as a placeholder. It allowed Richard to keep his classes on the same schedule. In this specific case, this instructional decision had more to do with common pacing of his classes and less to do with historical content. Thus, another example of the autonomy Richard has over both curricular and instructional decisions.

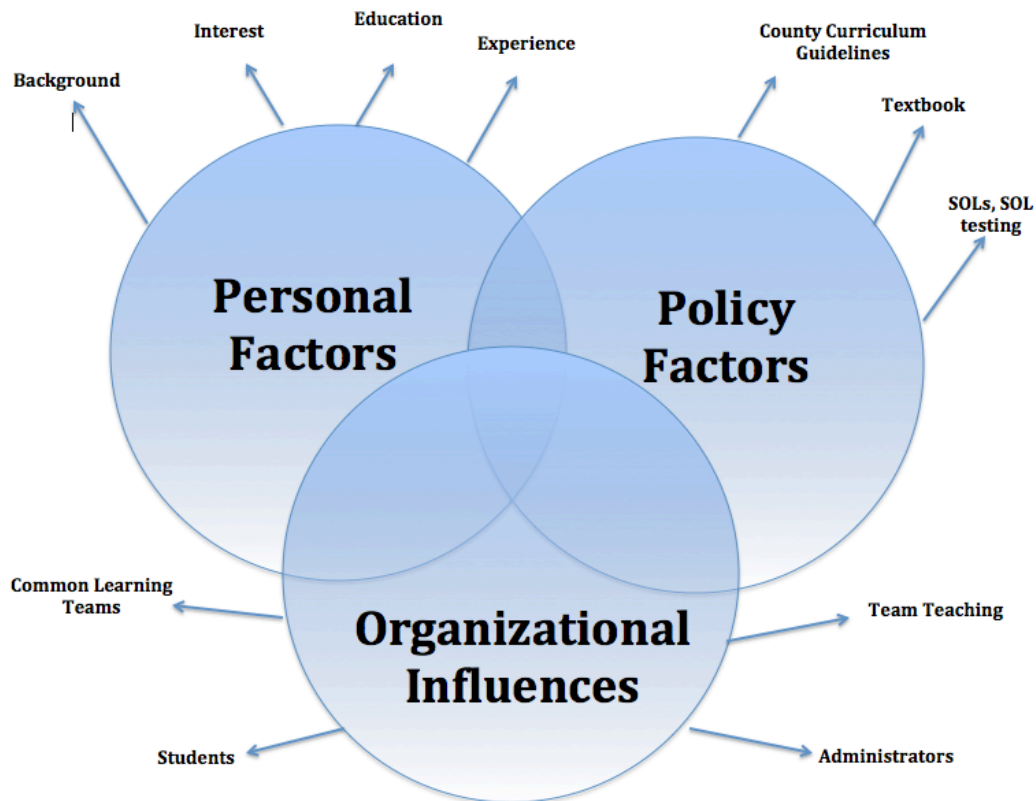
Summary

Throughout the entire research project, Richard was consistently negotiating different factors that ultimately influenced his curricular and instructional decision-making. Grant (2007) posits, “Negotiating among competing influences is a persistent and on-going dilemma for all teachers” (p. 252). Even though Richard believed from the beginning that the Standards of Learning were the most significant influence over his curricular-instructional decision-making, this study helped to highlight other factors influencing his decisions. Furthermore, this study illustrates the fluidity through which

the various influencing factors shaped Richard’s curricular and instructional decisions. It cannot be denied the impact that statewide curriculums and standardized tests have on classroom instruction. However, the amount of flexibility and autonomy Richard had over his daily decisions cannot be understated either. What was discovered during the course of this research was that influences oftentimes did not act in isolation of one another; rather, influencing factors within the classroom were engaged in much more complex and interconnected relationships.

At the onset of this research, I was naïve in my thinking that I would be able to examine the influences over Richard’s curricular and instructional decisions through the broad lens of Grant’s (1996, 2003, 2007) typologies: organizational influences, policy factors, and personal factors (See Figure 19). In theory, I was able to categorize the

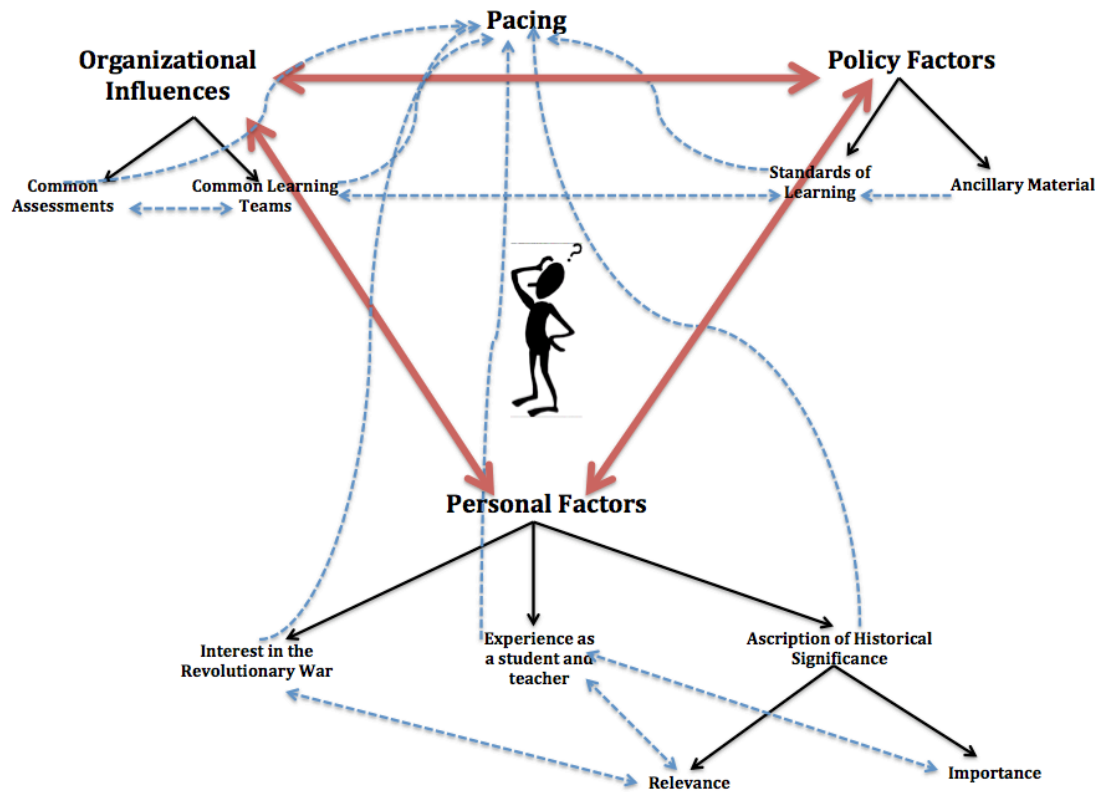
Figure 19. Grant’s (1996, 2003, 2007) typologies of influencing factors



various influences into these typologies and attribute decisions to each. However, when analyzing Richard’s practices in the classroom, I came to realize that decisions were not being made in such a neat, organized pattern. In fact, singular decisions were being influenced by multiple factors simultaneously.

Incorporating the typologies to help understand the influencing factors made for a nice visual representation, but what I discovered was that the truth was much more messy and entangled. After analyzing the data, I realized that I could not illustrate the influences on Richard’s curricular and instructional decision-making in such a clear and cogent manner. Rather, the influences affecting Richard’s decision-making appeared to be more of a tangled web of influences (See Figure 20).

Figure 20. An example of the intersecting influences affecting Richard’s curricular and instructional decision-making processes.



Furthermore, I found it very difficult to isolate individual factors from one another. What I found most interesting was the fluidity with which the various factors moved. Rarely was there a single factor that dominated Richard's decision-making.

Of all the factors influencing Richard's curricular and instructional decisions, the factor with the most fluidity was pacing. Similar to the element carbon, pacing appeared to be able to bond with any of the other factors. Even though Richard believes that the greatest influence over his decision-making are the S.O.Ls, I would argue that pacing of the course plays a larger role. The S.O.Ls provided a roadmap for information that is considered to be fair game to be included on the end-of-course test. However, the State never created a pacing guide for the course, leaving the pacing up to the individual teachers. In Richard's mind, student came to his class with a greater understanding of the 20th century, thus justifying his focus on the foundational period of this country. Richard felt comfortable spending more time on topics taught during the first part of the course by stealing time from the end of the course.

The idea of stealing time from the end of the year to spend more time on the areas of history that really interested Richard did not begin or end with the introduction of the S.O.Ls. Early on in his career, Richard would get as far as he could in the curriculum during the year, in fact he commented, "routinely I never got past Korea and Vietnam, but they (the students) knew their history and the story of America up to Korea and Vietnam" (September 25, 2015 interview). Even when there was not an end-of-course test pressing Richard to finish the curriculum by the test date, Richard still felt the pressures of pacing. In fact, what lies at the heart of Richard's discontent is his belief that, "This history is an ongoing road in construction and I don't think you can just do a little nugget here of an S.O.L and another nugget here of an S.O.L and expect the kids to

connect it, you've got to connect the whole story of America (October 2, 2015 interview). And here in lies the internal struggle Richard faces every year. Even with the elimination of activities, the reality for Richard is that he still is not able to go into the level of depth that he wishes he could have in this course. Do the S.O.Ls and their accompanying end-of-course test have a significant impact on Richard's curricular and instructional decisions? Yes, but even without the S.O.Ls or S.O.L test, pacing would still be a major driving force behind Richard's decisions.

Interestingly, with the case of the Revolutionary War period, Richard was very concerned about the students seeing the whole picture. However, he admittedly attempts to accomplish this at the expense of the other historical time periods included in the course. He complained about how the State relegated history to a series of historical nuggets for students to memorize, but in fact, his personal decision to extend the Revolutionary War unit magnified this concern. It appeared that Richard felt confident cutting down units later in the year, specifically during the 20th century. Richard commented, "When it comes to the 20th century stuff, most of them have lived it, and so I guess, I'm not as passionate about that one" (November 11, 2015 interview). However, what Richard failed to realize is that a majority of his current students were born in 1999. In fact, they do not have a working memory of the 20th century. It appears that when Richard justifies taking time from the 20th century to spend during the foundational period of the United States, that he is conflating his own lived experiences during the 20th century with the assumption that students had some of the same experiences. To Richard's defense, his students completed a modern world history course the previous year, which covers major world events through the 20th century. However, to argue for

shortening the later units in the year because students have lived in the 20th century would be inaccurate.

For all of his frustrations at how the State downgraded the Revolutionary time period to a series of facts to be memorized, Richard was a willing participant in this endeavor. Furthermore, it can be argued that because Richard chose to spend extra time on the Revolutionary War unit, he was actually the one perpetuating this practice. Due to his love and personal interest in the Revolutionary War, Richard consciously chose to complete the historical picture of this time period for students at the expense of every other time period. However, it appeared that Richard did not recognize the fact that in this relationship with the curriculum and instructional practices, he in fact was the puppet master, not the puppet. Much of his frustrations over the perceived constraints of the S.O.Ls and end-of-course test were self-inflicted due to personal decisions he made about the curriculum and accompanying instructional practices.

Richard is just one example of how a teacher makes curricular and instructional decisions in the classroom. Grant (2007) argues, “No one teaches in a vacuum; influences of all sorts are ever-present in the ways that teachers plan, enact, and assess their lessons” (p. 253). I found this to be true of Richard; his decisions were being influenced in a multitude of ways. However, Richard did not critically examine the question of historical significance. In fact, he struggled with explaining why he choose certain things other than students needed to see the whole picture of history in order to understand. It did not appear that Richard had spent a great time examining his own criteria for the inclusion of certain historical aspects. Additionally, since I only observed one unit of study, I cannot say whether Richard thought more specifically about historical significance later in the year. During the course of this unit, Richard made small

additions to the official curriculum to fill in perceived gaps. However, most decisions were based on perceived pacing restrictions and the ancillary reading guides. For Richard, the ancillary reading guides helped to frame the unit, lessons, and gave students a more complete version of history. Although the experiences of Richard may not be generalizable to all teachers, it does shed light on the impact high-stakes testing has on how teachers think about and implement curriculum.

Chapter 5: Discussion

At the onset of this research project, I began with one overarching question: In an educational climate where standards-based curriculums as well as high-stakes testing are the norm, how do the various interactional relationships impact the curricular and instructional decisions made by a veteran teacher? From this question, two sub questions were generated:

1. How does a veteran teacher's understanding of historical significance impact how they ascribe value to the purpose, nature and utility of history as a school discipline over time and space?
2. How tightly aligned are a veteran teacher's conceptions and perceptions of the purpose, nature and utility of history as a school subject with their observed pedagogical practices?

My research sought to investigate these questions to provide insight into the process of curricular and instructional decision-making by a veteran teacher. Grant (1996, 2003, 2007) suggests that teachers have overlapping influences impacting both curricular and instructional decisions. Although teachers often act as the final gatekeeper to curricular and instructional decisions, Thornton (1991) notes, "many [teachers] do not appear to be aware of, and may not be particularly interested in, the degree of control that their gatekeeping exercises over the curriculum they plan for their students" (p. 245). In order to add to the existing literature regarding curricular and instructional decision-making, I sought to examine the various interactional relationships within a single case study. This study examines the practices of a veteran teacher in an affluent suburban high school where students generally do not struggle to pass the State's end-of-course tests.

The theoretical frameworks that were incorporated into this study were that of historical significance and teacher as gatekeeper. Although two separate frameworks, their relationship is much more symbiotic than independent of one another. Historical significance as a framework was incorporated to help identify what if any criteria was used to identify and ascribe historical significance within the classroom. Studying historical significance within the confines of an educational environment where students are measured based on a rote memorization, multiple-choice test proved challenging to say the least. At times it was difficult to discern between a personal ascription of historical significance and how the standardized curriculum ascribed historical significance. At times, it appeared that over the course of Richard's teaching career that both forms of ascription had become blended and difficult to separate.

The second theoretical framework used throughout this study was that of teacher as gatekeeper. Beginning with the notion that teachers are the final gatekeepers in the process of curricular and instructional decision-making, I sought to better understand how Richard carried out the role of gatekeeper inside of his classroom. Richard had to make decisions every block with regards to curriculum, instruction, and pacing. In fact, he was the final decision-maker as to what to include or exclude within each lesson. Within the framework of teacher as gatekeeper, I was able to incorporate Grant's (1996, 2003, 2007) three categories of influences: policy factors, organizational influences, and personal factors. By incorporating Grant's categories into the teacher as gatekeeper framework, I was able to incorporate typological analysis into my work.

As I began my data collection, I used Grant's (1996, 2003, 2007) typologies to help organize and analyze my data. However, I soon discovered that Grant's typologies were too general and did not account for simultaneously overlapping influences. Even

though these typologies ended up being too general, they still served the purpose of helping to begin organizing the data. However, as I analyzed the data, the overlapping influence category of pacing began to take shape. The category of pacing transcended all categories and played a major role in the instructional decisions made by Richard. Aside from adding the category of pacing, my main analytical focus was on mapping the flow of influences as they shifted among and between categories.

This study looks at how an individual teacher plans and implements a unit of instruction within a high-stakes testing environment. The participant, Richard, was purposely selected based on availability, experience, and love for the unit being taught. The reason that it was important for Richard to be passionate about this unit was to gain a better understanding of how he determined what content to include as well as how that content would be presented to the students. The unit that was being observed was on the Revolutionary War. In his spare time, Richard is a Revolutionary War reinator and has a great wealth of knowledge as well as passion for this topic. I sought to understand how Richard would plan and implement a unit of study on a topic he loved that also had an end-of-course standardized test. In order to study Richard, the methodology that I used was that of a single case study. Through the incorporation of a case study methodology, I was able to examine the complexity of a single case (Stake, 1995). For the purpose of studying a single case, I used a variety of methods to collect data to better understand Richard's perspective. There were a series of interviews that took place to gain a better understanding of Richard's background as well as his personal philosophies for teaching and studying history. Additionally, I observed Richard carry out a unit of instruction to better understand his processes for implementing both curriculum and instruction. Document collection also proved to be a valuable source of data. Through the course of

my research, I collected documents from the unit to be analyzed and compared to statements made in the interviews. Additionally, I also collected the standards and articulation guides provided to teachers by the state of Virginia. By incorporating interviews, observations, and collecting documents, I was able to compare and contrast what was being said and what was being carried out in the classroom. Furthermore, the methodology of this study enabled me to better understand how Richard perceived himself as a teacher with regards to his curricular and instructional practices as well as how he actually implemented the curriculum through instructional decision-making. One key insight emerging from this case is that although Richard teaches in a high-stakes testing environment, he still has a lot of autonomy as the final gatekeeper to instruction. Moving forward, it is important to show teachers the autonomy they still hold over their curricular and instructional decisions inside of their classrooms. However, this autonomy must be recognized by teachers in order to unleash the potential benefits of deeper learning through the incorporation of inquiry-based instruction.

This research helps to fill a gap in the literature concerning how teachers interact and reconcile the internal and external influences affecting both their curricular and instructional decision-making within the classroom. Larger-scale implications for this research may be more far reaching as we begin to see a shift from high-stakes multiple-choice testing towards more performance based assessments. As more school systems begin to place a higher emphasis on critical thinking and application of knowledge, it is going to be important to help train and retrain teachers on best practices. It is important to understand how teachers perceptions are influencing the decisions they are making with regards to curriculum and instruction. In states like Virginia, where the end-of-course social studies tests will begin to be replaced with locally created performance

based assessments, how will teachers interact with the standards when the assessments may not consist of multiple-choice questions? Resources such as the C3 Framework as well as the inquiry model of teaching will help in the process; however, many teachers have never known as either a student or teacher anything other than high-stakes environments (Grant, Swan, and Lee, 2017).

Discussion

This study suggests that teachers are influenced by a variety of factors when it comes to both curricular and instructional decision-making. Using Grant's (1996, 2003, 2007) previous research as a starting point to analyze data collected, I found that Richard was influenced by the same three categories identified by Grant: policy factors, organizational influences, and personal factors. However, a fourth overarching category was discovered that influenced all three of Grant's (1996, 2003, 2007) typologies. The fourth category was pacing. Pacing concerns were cited as a major influencing factor for policy factors, organizational influences, and personal factors. Richard felt constrained for time due to the S.O.Ls (policy factors), common learning teams (organizational influences), and the want to have more time to spend on a topic that he loves so much (personal factors). However, for Richard, he feels that the most significant influence over his curricular and instructional decisions are the S.O.Ls and accompanying test.

It is understandable that a teacher working in a state that has high-stakes testing would be greatly influenced by the state curriculum as well as the end-of-course test. However, it was discovered that even with an official curriculum, there are still areas where Richard could insert topics and details that more closely aligned with his personal beliefs about what should be included in his course. Richard considers the state framework as the bare-bone skeleton of the course, allowing him to add in his own areas

of expertise to the curriculum. However, the state framework still adds limitations due to the amount of required information that needs be taught during the course, thus influencing his pacing of the material.

Findings

Using Hall (1997) as a basis, I have organized my findings around preferred and oppositional findings. Although Hall's (1997) use of the terms is connected to reading culture and media, I believe they hold possibilities for reading data and making evidence based claims while seeking to ethically represent the perceptions and actions of others. For the purpose of this research, preferred findings are those findings that may appear to be the most commonly acceptable and palatable reasons for curricular and instructional decision-making by teachers. Juxtaposed with preferred findings, oppositional findings are findings that, one might argue, provide an alternative narrative than that of the preferred or acceptable findings and not as agreeable to teachers.

Preferred findings. The preferred findings of this research are that Richard's ascription of historical significance is closely mirrored to the state standards and his role as an instructional gatekeeper was somewhat unrecognized. It is evident from the interviews that Richard is passionate about the Revolutionary War and can clearly ascribe historical significance to a variety of aspects of the Revolutionary War period. However, during the unit observed, he did not spend any significant time discussing his process with students for ascribing significance to the Revolutionary War period, let alone giving students time to determine their own criteria to ascribe significance. As far as being the final gatekeeper, Richard feels as though he did not have much authority when it came to curricular choices due to the S.O.Ls. Additionally, pacing pressures causes Richard to go through the material must faster than he would prefer. Richard commented several times

that prior to the introduction of the S.O.L tests, he very rarely finished the curriculum. For Richard, the end-of-course test represented a form of outside accountability, pressuring him to finish the official curriculum prior to the mandated testing window.

Historian or teacher. Richard viewed himself as both a historian and a teacher. However, over time, he said that he felt like these identities were in conflict with one another. Much of this conflict concerned the Standards of Learning and the accompanying test. In Richard's mind, as a historian, he saw his role as bringing the past to life in such a way that students could not only relate, but also empathize with people from the past. As a teacher, Richard sees his primary role as making sure that his students pass the end-of-course test. During the course of the classroom observations, Richard seemed to switch back and forth between these two perceived roles. Richard the historian was the storyteller. Similar to Evans (1988, 1990) research, Richard mirrored many of the practices utilized by participants his studies. Richard feels that the purpose of learning history was to learn about the past in order to understand the present. Similar to Evans' (1988) participant Wiley, Richard believes that in order for students to fully appreciate history, they must be able to relate their own lives to the past. Through the process of storytelling, Richard attempted to make connections with student lives. One example of this from classroom observations was when Richard was discussing the Boston Massacre. The state mentions the Boston Massacre in the essential knowledge section of the standards by stating, "The Boston Massacre took place when British troops fired on anti-British demonstrators" (VDOE website).

Even though the state standards do not include a lot of specific information about this event, Richard felt that students needed to have a much deeper understanding to appreciate the significance of the event. Richard had students view images and read

multiple accounts from varying perspectives related to the event, both primary and secondary sources. Throughout this activity, instruction was still very teacher-directed, but he wove the details as if he was putting the event on trial. This activity illustrates Richard the storyteller. It is evident that Richard was most comfortable in this setting, where he could weave a historical narrative together for his students. However, due to his concerns over pacing, Richard the storyteller had to be strategically inserted throughout the unit.

Over the course of this unit, Richard showed students two films in their entirety. Richard's affinity as a storyteller may be how he reconciled showing full-length films during this unit. Even though on one hand he stresses over the amount of time he has to teach this unit, he still choose to show the entire films. When asked why he chose to show an entire film as opposed to film clips on Valley Forge, he responded:

I think the easiest reason is because unless you see the progression of how Washington develops as a person and how his thought process progresses, you are not going to see how important he really was to the Revolution. And I think that is important to watch as it progresses over time and see it from that standpoint, if you only saw snippets, but that is just a snapshot and then you're done. I mean, you and I both got photo albums at home, if you're not there at the time the pictures really don't mean a whole lot to you. And so I think it is important to put it into context. (October 5, 2015 interview)

Richard perceived the movie as a form of storytelling for the students. For Richard, it is important for the students to see the human side of George Washington, so as to better understand the decisions that he made as a general.

Richard the teacher was more focused on the end-of-course test. He is not as interested in weaving a story for the students, typically due to time constraints. Richard admits that he has a tendency to do this more with 20th century history because he believes that students need to have a better understanding of 18th and 19th century U.S. history in order to understand what occurred in the 20th century. When Richard gets into the role of teacher, he is more about presenting the material than teaching/explaining the material. Similar to Richard's feeling of pressure to finish the curriculum, van Hover (2006) discusses similar accounts of "coverage" from beginning teachers. The pressures to cover the entire curriculum prior to the standardized test are a reality for many teachers, both beginners and veterans.

The key preferred findings of this research indicate that much of Richard's curricular and instructional decision-making was connected, as least in perception, to the state standards and end-of-course testing. Richard is very open about his feelings towards the S.O.Ls and the accompanying test and feels as though all of his curricular and instructional decisions were made with the S.O.Ls in mind. For Richard, his main job as a teacher has transitioned from teaching history to getting students to pass an end-of-course test. This was in line with what Grant (2007) had gleaned, "the perceived impact of state tests on teachers may be just as real as the consequences attached" (p. 250). Even though Richard teaches in a high-achieving school that tests better than most of the state, he still feels pressure to make sure students passed the end-of-course test so that they would meet graduation requirements. It was this perceived impact that drives much of Richard's decision making.

Because the state standards assessed information that is considered to primarily consist of first-order concepts (DeWitt et. al, 2013), Richard's teaching mirrored this

reality. In fact, DeWitt, et. al. (2013) noted in their study that approximately 92% of the U.S. history S.O.L test questions assessed at the end of the year fall into the category of first-order concepts (p. 406). Additionally, they noted that students on average needed to only answer 29 or 30 questions correctly (out of 60) in order to receive a passing score. Since the information that will be assessed at the end of the year consists of predominantly first-order concepts, Richard is hesitant to go into greater detail or more deep critical analysis of information. Richard's personal fear of students not passing the test influences much of his curricular and instructional decision-making.

For Richard, his focus on the test and student pass rates was not an irrational fear. In fact, some of his schools staff development objectives actually reinforced his practice of focusing on first-order concepts. At Richard's school, there was a heavy emphasis on backwards design. With backwards design, the objective is to construct the unit tests first, and then make sure that all instructional decisions are made with the final summative assessment in mind (Vogler and Virtue, 2007). A couple of years prior to this study, during the August staff development days, teachers were required to go through their tests to ensure that every question directly correlated to the Standards of Learning. Questions that did not directly correlate to the standards were to be removed to ensure that only the standards were being assessed. Even though Richard taught in a high-performing school, the institutional expectations were still heavily focused on students passing the S.O.L tests. Furthermore, there was a heavy focus on students not only passing the tests, but also scoring well enough to achieve pass advanced. So for a school in a school system that states they are not heavily focused on standardized testing, they spend a lot of time during staff development days and common learning team meetings making sure that teachers were teaching to the standards. This heavy focus on the end-

of-course tests not only encouraged, but also reinforced Richard's notion that first-order concepts should be the main focus of his course.

Oppositional findings. Even though Richard is very vocal about being boxed in by the standardized curriculum and testing, observations of his teaching suggest that Richard had much more autonomy to make personal choices with regards to the curriculum. For example, during this unit, Richard chose to go into much greater detail with regards to the Boston Massacre as well as showing two films in their entirety. If Richard only taught the S.O.L standards, he would not have spent so much time teaching about loyalist and patriots, the Boston Massacre, or Valley Forge. However, for Richard, he felt these topics were important for students to know in order to better understand the events of the American Revolution. Since Richard's students have historically done very well on the end-of-course test, Richard seldom critically evaluates his curricular and instructional practices. In fact, his test scores reinforced his curricular and instructional decisions. Richard did not have to spend a lot of time evaluating choices he made in the classroom because a large majority of his students would pass the end-of-course test with little difficulty. In large part, this is due to the privilege of teaching in one of the top high schools in the state of Virginia. It can be argued that since the school and its students are historically high achieving, that there is no value added when using traditional teaching methods. In essence, teachers at Washington high school have the privilege of being able to deflect questions and criticism regarding curricular and instructional decision-making from an internal process (self) to an external process (the standards and accompanying tests).

For Richard, the privilege observed was a play-it safe pedagogy in his classroom; he does what has worked in the past to maintain his high pass rates. Through the process

of implementing a play-it safe pedagogy, Richard is hesitant to teach history much beyond first-order concepts. Similar to this study, Saye (2013) notes, “The dominant pattern of instruction observed in social studies classrooms emphasizes superficial coverage of large bodies of content” (p. 90). Saye (2013) goes on to point out, “there is some evidence that state-mandated, high-stakes testing has impeded efforts to reform instruction in ways that promote complex, high-level learning” (p. 91). Richard argues that the reason he does not go into greater depth in his course is due to the amount of content included in the standards. This position in turn leads to the practice of “good enough” teaching. “Good enough” teaching refers to the practice of a teacher not critically examining their curricular or instructional decisions because of the existence of or student’s success on a standardized test. Teachers whose students score well on standardized tests may assume that they are great practitioners in the classroom. However, being a great practitioner is much more nuanced than the results on a state mandated test. In fact, Saye’s (2013) findings suggests, “students in classes emphasizing authentic pedagogy perform as well or better on tests of lower order content knowledge as their peers in classrooms with lower levels of intellectual challenge” (p. 111).

It can be argued that there is more to history than this negotiated interpretation of “I would do this but can’t because of the standards.” Rather, the standards appear to provide Richard something that he can hold up to suggest he has limited curricular and instructional control. However, as can be gleaned from this case study, this concept leads to very safe and “good enough” teaching practices that can be explained away by pointing to the impacts of standards and high-stakes testing.

Even though Richard felt that his curricular and instructions decisions were entirely controlled by outside influences (standards, testing, CLTs), this study discovered

that the findings were much more nuanced. Richard has time to include more second-order concepts into his instructional practices, but feels more comfortable being “good enough.” It would have been easier to simply conclude that Richard was the victim of a high-stakes environment and had little control over instructional decisions. However, this finding would have neglected the power and autonomy that Richard still holds as the final gatekeeper to both the curriculum and instructional practices.

I believe that the case study of Richard is not an anomaly. Rather, he is representative of how many teachers feel and respond to high-stakes testing environments. In Virginia, the S.O.Ls represent the minimum standards that students are to meet. In the case of Richard, by focusing so heavily on the S.O.Ls and accompanying tests, overtime he has become comfortable teaching to the minimum standard and thus was “good enough.” From this study, it can be gleaned that Richard’s practices are being influenced and reinforced by how well his students perform on the end-of-course test and not necessarily by literature on how students learn history and recent curricular initiatives stressing the importance of teaching history and social science for disciplinary thinking and historical literacy.

Implications

For history teachers. Richard is not the first teacher I have heard say that they feel constrained by standardized testing. In the case of Richard, “teaching to the test” is his understood reality. However, if the goal of education is to get beyond “teaching to the test,” we must also understand why teachers like Richard acquiesce to the perceived demands of standardized testing. A major part of pushing past the “teach to the test” mantra comes from critically evaluating the decisions made every day with regards to curriculum and instructional practices. The fact that it does not appear that Richard

spends a lot of time critically analyzing his curricular and instructional decisions is not necessarily an indictment of Richard or his teaching practices; rather, it appears to point to a larger issue plaguing education today. Richard teaches in an environment where student success is measured by a multiple-choice, end-of-course test constructed by a third party. It can be gleaned from this study that Richard has no intrinsic or extrinsic motivation to reevaluate his curricular and instructional decision-making each year due to his students' past performance on the end-of-course test. In the case of Richard, this is how high-stakes testing can affect a teacher in historically high-achieving schools. Overtime, in this type of environment, it is possible that teachers will become both a complacent and passive participant in the dissemination of history.

Throughout the research, Richard spoke about how the standards acted as the skeleton of his course and he worked to fill in the perceived gaps. However, later on, he discussed how the standards drove all of his decisions in the classroom. For teachers in high stakes testing environments, the lessons to be drawn from this study is that autonomy still exists for teachers. However, the degree of autonomy will most likely differ from school to school. Additionally, until teachers recognize that some level of autonomy exists, "good enough" teaching will remain a common practice.

For Richard, due to the fact that he teaches in a high-performing school allowed much greater autonomy in his decision-making. Yet, he did not consistently acknowledge the power that he held. For lack of a better term, Richard had become "institutionalized." By this I mean Richard has been a part of the high-stakes testing environment for so long that he felt powerless to the outside powerbrokers in education. This feeling of helplessness led him to get trapped in a routine that annually provided

great test scores, but neglected to continually analyze both the curriculum and instructional practices.

In order to throw off the yoke of standardized testing, teachers must continue to be actively involved in curricular and instructional decisions within their classroom. This is not to say that teachers should cast aside state-mandated curriculums. Rather, they should do as Richard said; use the curriculums as a framework to build the course. From there, teachers can then add information that they feel is the most significant. However, this does not mean that other factors such as pacing or school policies will not influence this process. There has always been some sort of restrictions on curricular and instructional decision-making in education. Decisions will always have to be made with regards to what to include or exclude in the classroom.

As a teacher educator. There are many instructional practices that are taught in teacher education programs. Often times, these practices are much more aligned with critical thinking, analysis, and historical inquiry in mind. But it needs to be expressed to future teachers that even if they are teaching in high-stakes testing environments, the independence and autonomy to make both curricular and instructional choices are present. Additionally, it is important to seek out cooperating teachers that use best practices in the classroom. Student teachers need to experience real life examples of teachers using inquiry-based instruction with their students. Having great role models when learning the art of teaching will help to move future educators past “good enough” instruction to see what potential exists for the incorporation of best practices. Through the work of researchers and practitioners, the C3 Framework and inquiry arc can help lead discussions and provide models for future and current teachers to implement more inquiry-based instruction.

As a department chair. As the state of Virginia begins to move away from multiple choice, standardized tests, and more towards performance-based assessments, the role of department chairs will be to help teachers transition to a new style of assessing student learning. There is a real concern that for teachers who have only ever taught in a high-stakes testing environment, will they be able to adjust to a world with more authentic assessments? Grant, Swan, and Lee (2017) share this concern by stating, “teachers typically have not experienced inquiry as students nor have they seen it being done by their cooperating teachers or peers” (p. 22). As a department chair, my role in general terms will still be the same: to support the planning and implementation of curriculum and instruction. However, I will have to have a greater understanding of inquiry-based pedagogy so that I can help facilitate the transition from the S.O.L tests to performance-based assessments. Additionally, I will need to not only support teachers in this endeavor, but I will also need to model best practices with regards to inquiry-based instruction.

As a department chair, it is important that I help my department examine our perceived purpose for studying history and attempt to find a common understanding. van Hover and Hicks (2018) echo this sentiment by stating, “the field continues to struggle with articulation of purpose—how history and inquiry are defined, for what purposes history should be taught, how history should be taught, and most importantly how, why, and in what ways teacher and student outcomes should be assess” (p. 400). Without being able to address these questions, we may become trapped in an instructional loop, thus perpetuating an educational status quo. Department chairs, as instructional leaders, need to actively participate in these conversations on a macro level. Not only do we need to engage our own departments in professional development, but we also need to work

with educational researchers to help promote the idea of a “shared language of history practice” (van Hover and Hicks, 2018). Grossman and McDonald (2008) go on to argue,

A common language can serve as one powerful tool in uniting a community of researchers and practioners engaged in the improvement of teaching and teacher education. By literally speaking the same language, researchers can build on prior work and communicate their findings more powerfully both to each other and to practioners (p. 198).

By adopting and utilizing a common language, teachers and researchers may begin to bridge the gap between research and practice. If the goal of history education is to move towards ambitious and authentic instruction, there must be a dialogue between researchers and practioners. As Fogo (2014) notes, “Ambitious, authentic instruction runs counter to the ‘traditional’ history classroom, where curriculum covers wide expanses of time, teachers provide content-heavy lectures, and students take notes and scour textbooks to put facts to memory” (p. 153). It is the role of the department chairs to not only help facilitate these conversations, but also help teachers transition from “traditional” instructional practices to more ambitious and authentic instruction. Furthermore, by adopting common language, teachers and teacher educators can begin to address questions regarding ambitious and authentic instruction in a more unified manner; working together instead of independently. Department chairs have a unique opportunity to act as a conduit of information between teachers and teacher educators.

Limitations

Although this research shed light on the processes employed by Richard through the course of a single unit, there were some limitations. As with any case study, this study highlighted the practices of only one teacher for one unit of instruction. Richard

was not speaking for all teachers and his experiences were unique to him. Additionally, because Richard taught in a high-performing school, some of the issues he faced may not be able to be generalized to other schools or other teachers. However, case studies are good because they are a typification of practice. Even though these findings may not be entirely generalizable, Richard's experiences in a high-stakes testing environment sheds light on a teacher's curricular and instructional decision-making processes.

As with most qualitative studies, the study is limited by the fact that I had to take Richard at his word. Since I only observed one unit of instruction, I cannot definitively say whether or not Richard was truly authentic with his interviews or observations. Had I been able to observe him over several units or even a year, I would be able to better speak to this point. As a researcher, I can only go off of what Richard said in the interviews as well as what I observed in the class.

Direction of future research

Richard's experience as a history teacher in a high-performing school helps to illustrate how high-stakes tests can retard critical self-reflection. By all measurable accounts, Richard is a very successful teacher. He is well liked by his students, co-workers, and administrators. His students' test scores are well above the pass rate for the state. However, because of his success, Richard has not had to critically evaluate his pedagogical decisions with regards to the curriculum or instruction. And if in the end, the goal for researchers is to better understand how students conceptualize and ascribe historical significance, it is important to make sure that teachers can also conceptualize and ascribe significance.

Moving forward, it is important to continue to examine the concepts of historical significance within the confines of the classroom. As there continues to be a push for

more authentic and engaging practices in the social studies classrooms, researchers need to continue to work to better understand the ongoing complexity of teaching. Although my case study was small, I believe that it adds to the growing body of literature on social studies education. On the one hand, it reinforces the impact of high-stakes testing on teachers and their decision-making. On the other hand, it points out the possibilities. Even though Richard felt bound by the standards and testing, it can be gleaned from the research that teachers still maintain quite a bit of autonomy over curricular and instructional decisions made in their classroom. Additionally, this research reinforces the importance of continual and consistent reexamination of practices to ensure that best practices are occurring.

Although my methodology may not have been perfect to completely capture the complexity of a classroom environment, it is a starting point. It is my hope that researchers will continue to attempt to understand the role of historical significance in the classroom as well as the various influences affecting teachers' decision-making. Additionally, I hope that teachers will begin to reflect and examine their own practices through a critical lens. For me personally, I feel like this case study has forced me to re-examine my own thoughts and practices about classroom teaching and from this research, I feel like I have become a better teacher.

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Appendix A: Reading Study Guides from the unit observed

Name _____ Date 9/29/15

CHAPTER 4 Section 1 (pages 96-102)

The Stirrings of Rebellion

BEFORE YOU READ

In the last section, you learned how the British and their American colonists pushed the French out of North America.

In this section, you will learn about the conflicts that led to the start of the American Revolution.

AS YOU READ

Use this chart to take notes about the conflicts between Great Britain and the American colonies.

TERMS AND NAMES

Stamp Act Law passed by Parliament to make colonists buy a stamp to place on many items such as wills and newspapers

Samuel Adams One of the founders of the Sons of Liberty

Townshend Acts Laws passed by Parliament in 1767 that set taxes on imports to the colonies

Boston Massacre Conflict between colonists and British soldiers in which four colonists were killed

committees of correspondence A network of communication set up in Massachusetts and Virginia to inform other colonies of ways that Britain threatened colonial rights

Boston Tea Party Protest against increased tea prices in which colonists dumped British tea into Boston Harbor

King George III King of England during the American Revolution

Intolerable Acts A series of laws set up by Parliament to punish Massachusetts for its protests against the British

martial law Rule by the military
minutemen Civilian soldiers

BRITISH ACTIONS	COLONISTS' ACTIONS
Stamp Act	Boycotted British goods

The Colonies Organize to Resist Britain (pages 96-98)

Why did the colonists protest Britain's taxes?

Tension between Britain and the colonists continued to grow. In 1765, The British Parliament passed the **Stamp Act**. This act required colonists

to buy and place stamps on items such as wills and playing cards. It was the first tax that affected the colonists directly because it was placed on the everyday goods they bought. Previous taxes had been placed only on goods coming into the country.

The new tax angered the colonists. Many *boycotted* British products in protest. A secret group called the Sons of Liberty played an active role in

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the boycott. The group was led by political activist **Samuel Adams**.

The colonists declared that Parliament could not tax them because they were not represented in Parliament. The colonists argued that only colonial lawmaking bodies had the right to tax them.

In March of 1766, Parliament *repealed* the Stamp Act. However, a year later, Parliament passed the **Townshend Acts**. These laws placed taxes on even more imports and on tea. Colonists in Boston protested the new taxes with boycotts and riots. The British sent more troops to America to prevent further riots.

1. Why did the colonists feel that Parliament had no right to tax them?

Tension Mounts in Massachusetts (pages 98–99)

Why did the king take control of Massachusetts?

In the winter of 1770, a group of Boston protesters gathered to harass some British soldiers. The soldiers fired into the group. Five Bostonians were killed. Colonial leaders called the event the **Boston Massacre**.

For a while after the shooting, both sides relaxed. Tensions, however, eventually increased again. As a result, the colonial assemblies established **committees of correspondence** to communicate with each other about various threats to American liberties.

In 1773, the British made yet another move that angered the colonists. The government gave a British company the right to all the trade in tea. Colonial merchants were angry at losing their tea business. One night, several colonists snuck aboard a British ship carrying tea in Boston Harbor. The colonists dumped all of the ship's tea into the harbor. This event became known as the **Boston Tea Party**.

The Boston Tea Party angered **King George III**. To punish Massachusetts, Parliament passed a set of laws called the **Intolerable Acts**. Acting under these acts, Britain closed Boston Harbor and placed Boston under **martial law**, or rule by the military.

Britain's actions prompted colonial leaders to form the **First Continental Congress**. The group met in 1774 and drew up a declaration of colonial rights. They demanded that the colonies be allowed to run their own affairs. They agreed to meet again in 1775 if their demands were not met.

2. How did the colonists react to the Intolerable Acts?

Fighting Erupts at Lexington and Concord (pages 100–102)

What happened at Concord and Lexington?

Some New England towns began to prepare for a war against Britain. **Minutemen**, or civilian soldiers, stored guns and ammunition in secret hide-aways. In 1775, the British marched to Concord, Massachusetts, to seize these weapons. Colonists, including Paul Revere, watched the troops march out of Boston. Revere rode ahead of the troops on his horse. He warned people that the British were headed for Concord.

A group of armed minutemen met the British troops as they reached the town of Lexington, Massachusetts. Someone fired a shot. The British soldiers responded by shooting into the crowd of minutemen. Several minutemen were killed, while others were injured. The British suffered only one *casualty*. The Battle of Lexington lasted only 15 minutes.

The British soldiers then marched on to Concord, where they found no weapons. On their trip back to Boston, between 3,000 and 4,000 minutemen *ambushed* them. The colonial soldiers killed dozens of British soldiers. The rest of the defeated British troops returned to Boston that night.

3. How did the outcomes at Lexington and Concord differ?

CHAPTER 4 Section 2 (pages 103-108)

Ideas Help Start a Revolution

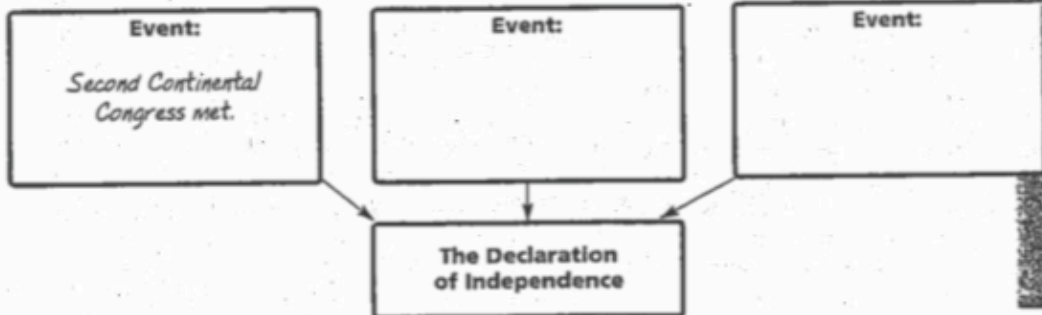
BEFORE YOU READ

In the last section, you learned about the conflicts that led to the start of the American Revolution.

In this section, you will learn why the colonists declared their independence.

AS YOU READ

Use this diagram to take notes. Fill in the boxes with the events that led to the signing of the Declaration of Independence.



TERMS AND NAMES

Second Continental Congress The meeting of colonial delegates that approved the Declaration of Independence

Olive Branch Petition An offer of peace sent by the Second Continental Congress to King George III

Common Sense Pamphlet written by Thomas Paine that attacked the monarchy

Thomas Jefferson Main author of the Declaration of Independence

Declaration of Independence Document that said the United States was an independent nation

Patriots Colonists who wanted independence from Britain

Loyalists Colonists who were loyal to Britain

The Colonies Hover Between Peace and War

(pages 103-105)

What was the Olive Branch Petition?

In May of 1775, *delegates* from the First Continental Congress met again at what became known as the **Second Continental Congress**. During the meeting, some leaders urged independence from Great Britain. Others were not ready for independence. The Congress did create the Continental Army, however. Congressional leaders placed George Washington in charge of the army.

In June of 1775, British troops fought against colonial soldiers near Boston in the Battle of Bunker Hill. More than 1,000 British soldiers were killed. The colonists lost 311 men. This battle would be the deadliest of the war.

Although the colonists were preparing for war, they were hoping for peace. Most colonists still felt a deep loyalty to Britain's king, George III. They blamed the bloodshed in the colonies on the king's ministers. In July of 1775, the Continental Congress sent King George III a peace offer, called the **Olive Branch Petition**. This petition urged a return to "the former harmony" between Britain and the colonies.

King George III flatly rejected the petition. Furthermore, he issued a proclamation stating that the colonies were in rebellion. He urged Parliament to order a naval blockade of the American coast.

1. How did King George III react to the Olive Branch Petition?

The Patriots Declare Independence (pages 105–106)

What ideas supported rebellion?

More colonists began to object to British rule and to call for independence. Many were influenced by a pamphlet titled *Common Sense*. Colonist Thomas Paine was the author. He argued that independence would lead to a better society.

In June 1776, the Continental Congress moved closer to declaring the colonies independent. The Congress asked **Thomas Jefferson** of Virginia to write a document stating the colonies' reasons for declaring their freedom. The document became known as the **Declaration of Independence**.

The Declaration of Independence was based on the ideas of English philosopher John Locke. Locke said that people have "natural rights" to life, liberty, and property. Locke also argued that citizens form a social contract, or an agreement, with their government. If the government tries to take away people's natural rights, the people can overthrow the government.

In the Declaration of Independence, Jefferson wrote that people's rights to life, liberty, and the pursuit of happiness cannot be taken away. Government gets its power from the people, and the people can remove a government that threatens their rights. He then listed in the document the many ways that Britain had taken away the colonists' rights.

The Declaration states that "all men are created equal." When this phrase was written, it expressed the common belief that free citizens were political equals. However, it did not claim that all people had the same ability or ought to have equal wealth. In addition, the Declaration did not include women,

Native Americans, and African American slaves. However, Jefferson's words presented ideals that would later help these groups challenge traditional attitudes.

The Second Continental Congress adopted the Declaration on July 4, 1776. The Declaration of Independence thrilled **Patriots**—colonists who supported independence.

2. How did the Declaration of Independence support the notion of rebelling against Britain?

Americans Choose Sides (pages 106–108)

Who were the Loyalists and the Patriots?

Despite the growing atmosphere of rebellion in the colonies, many colonists opposed independence. These colonists were known as **Loyalists**. They supported the British and were loyal to the king. Some loyalists felt a special tie to the king because they had served as judges, councilors, or governors. Most Loyalists, however, were ordinary people. Some felt that the British could protect their rights better than a new colonial government could. Others simply did not want to be punished as rebels.

Those colonists who supported independence were called Patriots. This group included farmers, artisans, merchants, and landowners. They wanted to be free from British rule. Others saw great economic opportunity in a new and independent nation. Patriots made up a little less than half of the colonial population.

The conflict divided other groups as well. The Quakers generally supported the Patriots. However, they did not fight. They did not believe in war. Many African Americans joined the Patriots. Others joined the Loyalists because they were offered freedom from slavery. Most Native Americans supported the British. They viewed colonial settlers as a bigger threat to their land.

3. Why did some colonists remain loyal to Britain?

Name _____

Date 10/7

CHAPTER 4 Section 4 (pages 118-123)

Winning the War

BEFORE YOU READ

In the last section, you learned about the early battles in the American Revolution.

In this section, you will learn how the Americans won the war.

AS YOU READ

Use the time line to take notes on the important battles and other events toward the end of the Revolutionary War.

TERMS AND NAMES

Friedrich von Steuben Prussian officer who helped train American soldiers

Marquis de Lafayette French noble who helped the Americans

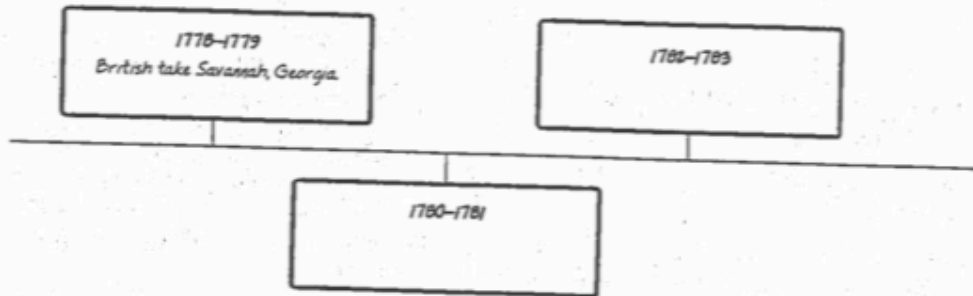
Charles Cornwallis British general

Yorktown Battle that gave Americans victory in the war

Treaty of Paris Treaty that officially ended the war

egalitarianism A belief in equality

pointed out by teacher } Need to know



European Allies Shift the Balance (pages 118-119)

What help did the Europeans offer?

During its miserable winter at Valley Forge, the Continental Army underwent a significant change. **Friedrich von Steuben**, a Prussian officer and expert drillmaster, began to train the American troops. He helped to turn the inexperienced soldiers into a strong fighting army.

In 1778, French help began to arrive for the colonists. **Marquis de Lafayette**, a Frenchman, also offered his help to Washington's army. Along with von Steuben, he helped improve the fighting ability of the Continental Army.

1. How did von Steuben and Lafayette help the Americans?

The British Move South (pages 119-121)

Why did the British forces move South?

In the summer of 1778, the British changed their war strategy. They shifted much of their operations to the South. British generals hoped to gain Loyalist support in the South and then fight their way back north.

At first, the British plan worked. British troops took Savannah, Georgia. The British Army, led by General Charles Cornwallis, then captured Charles Town, South Carolina. The British took 5,500 American soldiers as prisoners of war. The British soon had a firm hold on Georgia and South Carolina.

Washington sent General Nathanael Greene to stop the British in the South. A unit of Greene's army defeated the British at Cowpens, South Carolina, in January 1781. Meanwhile, Cornwallis continued moving north. He marched his army to Yorktown, Virginia. Yorktown lay along the Chesapeake Bay. From there, Cornwallis hoped to take Virginia and then meet up with British forces in the Northern colonies.

2. Why did the British move much of its military operations to the south?

The British Surrender at Yorktown

(pages 121–122)

How did the American forces win at Yorktown?

American and French forces decided to attack Cornwallis at Yorktown. As they marched in, a French naval force defeated a British fleet on the Chesapeake Bay. As a result, the Americans and French were able to surround Cornwallis's troops—blocking both their land and sea routes. The colonial and French forces bombarded Yorktown for days. Finally, on October 19, 1781, the British surrendered. The Americans had won the war.

The next year, the Americans and British began to discuss peace terms. John Adams, Benjamin Franklin, and John Jay were the American delegates to the peace talks in Paris. The Treaty of Paris was signed in 1783. Under the agreement, Britain recognized the United States as an independent nation. The British also gave America all the land from the Atlantic Ocean to the Mississippi River. Some provisions of the treaty promised future trouble. The treaty, for example, did not specify

when the British would evacuate their American forts.

3. What did Britain do as a result of the Treaty of Paris?

The War Becomes a Symbol of Liberty

(pages 122–123)

What did the Revolution mean?

The American Revolution brought society's different classes together. During the war, rich and poor fought alongside each other. Military leaders grew to respect their men. This togetherness brought about a feeling of egalitarianism—a belief in the equality of all people. Egalitarianism taught that people should be valued for their ability and effort—not for their wealth or family background.

This egalitarianism, however, applied mainly to white males. Most Africans remained enslaved. A growing number of people urged the new nation to end slavery. But Southern states opposed such an idea. They did not want to lose their laborers. The American Revolution also did not change the status of women or Native Americans. These groups still did not have the rights that white male property-owners did.

Americans had rejected the British system of government, in which kings and nobles held power. In its place, they set out to build a stable republic, a government of the people. To create this republic, however, the colonists would have to address several key issues: Who should participate in government? How should the government answer to the people? How could all of the different groups' voices be heard?

4. How were the changes to American society brought on by the American Revolution limited?



September 27, 2018

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Sincerely,

Kristin Riggs

Kristin Riggs
IP Analyst

Appendix B: Movie Notes for "Story of a Patriot"

Questions for "Story of a Patriot"
US History

Name _____

Date 9/29

Period _____

Directions; as you watch this film answer the following questions. (2 points each)

1. When John Fry is elected to the Virginia House of Burgesses how does he react to Patrick Henry?
2. How does he react to the idea of boycotting British goods in response to the Townshend Act?
3. What does John Fry learn on his visit to George Wythe' house?
4. How do Patrick Henry and Thomas Jefferson propose to publicly protest the Boston Port Bill?
5. What actions do the British marines take in Williamsburg?
6. What do John Fry and Robert Fry (his son) decide to do when word of Lexington and Concord arrives in Williamsburg?

OVER PLEASE

Discussion Question (5 points each)

1. John Fry changed his own attitude toward England during the course of the film. Why do you think this happened?
2. Why do you think a large number of American colonists remained loyal to England during the Revolution?

Appendix C: Dissecting the Boston Massacre Activity

C1997100M COPY 2
10/1

About.com : American History

The Boston Massacre

From [Martin Kelly](#),
Your Guide to [American History](#).
FREE Newsletter. [Sign Up Now!](#)

Part 1: Facts and Questions

The town of [Boston](#) was a very uneasy city throughout the 1760's. This uneasiness quickly turned to belligerence in the early part of 1770. Tensions had been mounting from the beginning of the year with various clashes between British sympathizers and colonists. However, in early March the tensions erupted into bloodshed.

On March 5, 1770 a small group of colonists were up to their usual sport of tormenting British soldiers. By many accounts there was a great deal of taunting that eventually lead to an escalation of hostilities. The sentry in front of the Custom House eventually lashed out at the colonists which brought more colonists to the scene. In fact, someone began ringing the church bells which usually signified a fire. The sentry called for help, setting up the clash which we now call the Boston Massacre.

A group of soldiers led by Captain Thomas Preston came to the rescue of the lone sentry. Captain Preston and his detachment of seven or eight men were quickly surrounded. All attempts to calm the crowd proved useless. At this point, the accounts of the event vary drastically. Apparently, a soldier fired a musket into the crowd, immediately followed by more shots. This action left several wounded and five dead including an African-American named [Crispus Attucks](#). The crowd quickly dispersed, and the soldiers went back to their barracks. These are the facts we do know. However, many uncertainties surround this important historical event:

- Did the soldiers fire with provocation?
- Did they fire on their own?
- Was Captain Preston guilty of ordering his men to fire into a crowd of civilians?
- Was he innocent and being used by men like Samuel Adams to confirm the oft-claimed tyranny of England?

The only evidence historians have to try and determine Captain Preston's guilt or innocence is the testimony of the eyewitnesses. Unfortunately, many of the statements conflict with each other and with Captain Preston's own account. We must try to piece together a hypothesis from these conflicting sources.

This About.com page has been optimized for print. To view this page in its original form, please visit:
http://americanhistory.about.com/od/revolutionarywar/a/boston_massacre.htm

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Appendix D: Rewriting activity for the Declaration of Independence

10/1

2

The Declaration of Independence - 1776

We hold these truths to be self-evident, that all men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty, and the Pursuit of Happiness---That to secure these rights, Governments are instituted among Men, deriving their just powers from the Consent of the Governed, that whenever any Form of Government becomes destructive of these Ends it is the Right of the People to alter or abolish it, and to institute new Government, laying its Foundation on such Principles, and organizing its Powers in such Form, as to them shall seem most likely to effect their Safety and Happiness.

-- Thomas Jefferson

**** Your assignment is re-write this famous passage in your own words. You should attempt to cover all the ideas that Jefferson so masterfully outlines. Be as creative as you like with your version of this passage. We will read some of these in class.**

Appendix E: Revolutionary War Unit Test

DO NOT WRITE ON TEST! Please mark your answers on the scantron.

UNIT TWO TEST: Revolutionary War A

True or False (A = True; B = False)

(If the statement is True then fill in bubble "A" on your scantron. If the statement is False, then fill in bubble "B".)

1. Benjamin Franklin developed the idea of the Social Contract.
2. John Locke sat down with Thomas Jefferson to help him write the Declaration of Independence.
3. Thomas Paine wrote Common Sense.
4. If you were a Tory, you remained neutral during the fighting of the Revolution.
5. The French and Indian war was fought between the French and the Indians.
6. The Continental Army was so much larger than the British Army during the Revolution, that the colonists won almost every battle.
7. The Stamp Act placed a tax on most paper products used in the colonies.

End of True/False Questions

8. The idea of natural rights is best defined as rights
 - A. to a place to live and a place to work.
 - B. given to citizens but not to non-citizens.
 - C. that are made into laws by government.
 - D. that governments cannot take away.
9. What is the "social contract"?
 - A. Franklin's idea that society has certain rules and social classes that must be upheld.
 - B. Paine's idea that a verbal contract is legally the same as a written one.
 - C. Locke's idea that government should only exist with the consent (or agreement) of the people who are governed.
 - D. NONE OF THE ABOVE
10. *Common Sense* was most influential in persuading American colonists to support
 - A. the Whiskey Rebellion.
 - B. additional British taxes on the colonies.
 - C. Colonial independence.
 - D. continued ties with Great Britain.
11. Which statement represents one of the main ideas in the Declaration of Independence?
 - A. The United States needs a strong central government.
 - B. Americans cannot afford to pay high British taxes.
 - C. People have a right to rebel against an unjust government.
 - D. The power of the president must be limited by the legislative and judicial branches.

Use the passage to the right to answer question #12.

12. The passage to the right comes from the:
 - A. Second Treatise on Government.
 - B. Declaration of Independence
 - C. Articles of Confederation.
 - D. Constitution.

We hold these truths to be self-evident: That all men are created equal; that they are endowed by their Creator with certain unalienable rights; that among these are life, liberty, and the pursuit of happiness.

13. Whose ideas did the author of the Declaration of Independence follow?
- Paine and Locke
 - Alexander the Great
 - Clinton and Washington
 - Franklin and Lafayette
14. The Declaration of Independence promoted (supported) which of the following ideas?
- protecting the right to own slaves.
 - extending civil rights to women and African Americans.
 - that the people have the right to abolish (get rid of) a corrupt government
 - extending the franchise (the right to vote) to all people
15. Which of the following most accurately describes the cause of the French & Indian War?
- The French and the British colonists allied together to try to kick the British out of North America.
 - The British colonists were caught in the crossfire in a war between the French and the Indians
 - Both the French and the British claimed the same areas in North America, particularly the Ohio River Valley
 - After the colonists declared themselves independent from Britain, the French attacked the weakened colonies.
16. The French and Indian War of 1754–1763 involved the major European colonial powers in North America. What was the most significant change that occurred as a result of the war?
- Spanish territory extended deep into eastern Canada.
 - The French lost most of their territory in North America east of the Mississippi River.
 - Large numbers of colonists gained their independence.
 - Spanish territory in North America was significantly reduced.

Use the following graphic organizer to answer question #17.



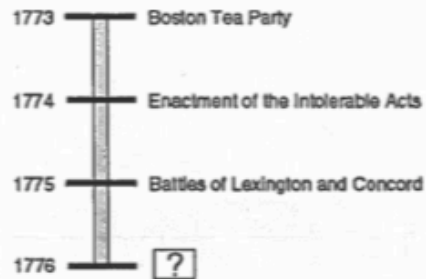
17. Which events in U.S. history best complete the graphic organizer (in order)?
- Boston Tea Party, Townshend Duties
 - Stamp Act, Boston Massacre
 - Declaration of Independence, Articles of Confederation
 - First Continental Congress, Treaty of Alliance

End of Graphic Organizer Questions

18. How was the British Stamp Act connected to the French and Indian War?
- The British sought to punish the colonists for losing the French and Indian War.
 - The Stamp Act sped up wartime communications.
 - The act was a tax to pay for the costs of the French and Indian War.
 - The French and Indian War caused the British to lose interest in their North American Colonies
19. Colonists protested the Townshend Duties by:
- Burning down the houses of the stamp tax collectors
 - Reducing colonial smuggling.
 - Refusing to buy or use British goods
 - Dumping British-owned tea into Boston Harbor

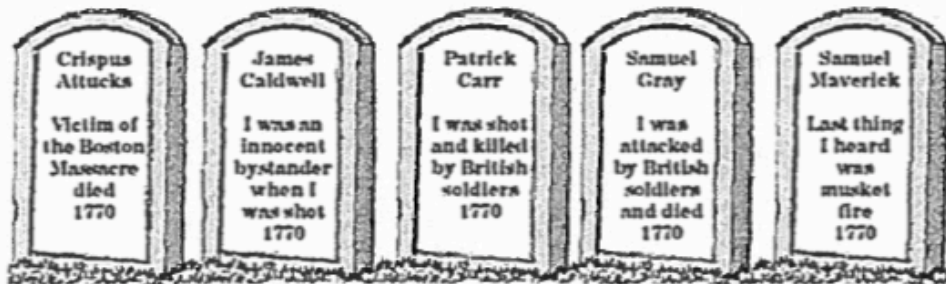
Use the following timeline to the right to answer question #20

20. Which of the following events completes the timeline?
A. Battle of Saratoga
B. Passage of the Townshend Acts
C. Writing of the Declaration of Independence
D. Ratification of the U.S. Constitution



End of Timeline Questions

Use the following illustration to answer question #21.



21. What colonial claim about the Boston Massacre is best supported by this illustration?
A. There were more soldiers than civilians at the Boston Massacre.
B. British soldiers fired on unarmed colonists.
C. Colonists were better equipped for the war than the British soldiers were.
D. Most of the American colonists in Boston were killed.

End of Illustration Questions

22. Which of the following men helped to found the Sons of Liberty?
A. William Franklin
B. George Washington
C. King George III
D. Samuel Adams
23. What battle was the "turning point" of the war that gave France confidence to join the Rebellion against Britain?
A. Saratoga
B. Gettysburg
C. Philadelphia
D. Lexington & Concord
24. The Boston Tea Party...
A. Was a battle fought in Boston between British soldiers and a mob of youth
B. Was a protest of the colonists' love for tea by the Mohawk Indians
C. Was a protest of the taxes and restrictions placed on the Colonists by Britain
D. Was a meeting between the leaders of Britain and the 13 colonies to discuss the recent uprisings in the area
25. What was the most significant factor that led the American colonists to form the First Continental Congress?
A. religious conflict inside the American colonies
B. Colonial resistance to British rule
C. desire to stop the war between Britain and the colonies
D. desire to write a Constitution to replace the Articles of Confederation

26. The "shot heard round the world" is associated with which of the below?
- The Battle of Bunker Hill
 - The Battle of the Burn
 - The Battle of Lexington and Concord
 - The Battle of Yorktown
27. The last major battle of the Revolutionary War took place in
- Yorktown, Virginia
 - New York, New York
 - Gettysburg, Pennsylvania
 - Saratoga, New York
28. In the colonies at the beginning of the war, Patriots made up
- about one-fourth of the population.
 - about half the population.
 - about one-third of the population.
 - nearly all of the population.
29. What was Britain's response to the Boston Tea Party?
- The Sugar Act
 - The Intolerable/Coercive Acts
 - The Quartering Act of 1766
 - The Tea Act
30. George Washington played an important role during the American Revolution while serving as
- Ambassador to France.
 - Attorney general for the colonies.
 - General of the Continental Army.
 - President of the Continental Congress.
31. All of the following contributed to an American victory in the Revolution *EXCEPT*
- the well-trained and well-fed American soldiers
 - French military support at the Battle of Yorktown.
 - George Washington's leadership of the army.
 - lack of support for the war amongst British citizens.
32. Benjamin Franklin convinced which of the following countries to lend military support to the American army during the American Revolution?
- France
 - Portugal
 - Russia
 - Spain

For Questions #33-37, match the statements with the people who would have made them. (Mark A, B, or C on your scantron for each statement.)

- LOYALIST
- PATRIOT
- NEUTRAL

33. "I hate King George III and his awful taxes! We should have complete independence from Britain!"
34. "Revolution? That sounds pretty drastic. I see the rebels' point, but the King is our King. I can't make up my mind!"
35. "These new Acts are Intolerable! The British are violating our rights to liberty and property by closing our ports and putting soldiers in our houses!"
36. "King George is a noble man. God has chosen him to lead us and I shall follow!"
37. "We have more to lose by becoming independent from Great Britain, especially economically."

Use the following political cartoon to answer question #38.



Source: Benjamin Franklin, *The Pennsylvania Gazette*, May 9, 1754 (adapted)

38. Which statement most accurately expresses the main idea of this political cartoon from the 1750s?
- Any colony that does not unite will be attacked.
 - Colonies cannot survive unless they are united.
 - Colonies that do not unite are not loyal.
 - Each colony should maintain its independence.
39. Which description below best describes the Hessians?
- Name of the fort built by George Washington against the French
 - German mercenaries employed by the British
 - German mercenaries employed by the French
 - Nickname the colonists gave the King of England
40. Which of the following is NOT TRUE about the Boston Tea Party?
- It was a response to the Tea Act of 1773, which said colonist could only buy taxed tea from the British East India Company
 - It was planned by the Sons of Liberty, who dressed up as Native Americans when they dumped the tea into the harbor
 - Boston merchants escaped punishment by agreeing to pay for all the dumped tea over a period of five years
 - The British were so angry about the dumped tea that they closed the Port of Boston and shut down the colonial assembly

For questions #41-45, match the description on the left with the people on the right.


- Some people may be used more than once.
- Others may not be used at all.

41.	Wrote <i>Common Sense</i>
42.	Wrote the <i>Declaration of Independence</i>
43.	Alerted the colonial militia that British troops were moving to Lexington and Concord to capture the arms and ammunition there
44.	Said "Give me liberty or give me death!"
45.	Made the famous engraving of the Boston Massacre that ignited public outrage against the British


A.	Patrick Henry
B.	Paul Revere
C.	Thomas Paine
D.	Benjamin Franklin
E.	Thomas Jefferson

46. Which product turned Jamestown into a profitable business venture for the Virginia Company of London?
- A. Timber
 - B. Tobacco
 - C. Gold
 - D. Corn
47. The colony to have the first elected assembly in the New World was —
- A. Virginia
 - B. Massachusetts
 - C. Pennsylvania
 - D. New York
48. What was ironic about the Massachusetts Bay colony?
- A. They came to the New World for religious freedom, but did not offer religious freedom
 - B. The people who lived in the colony had to wear all black and go to church for most of the day on Sunday
 - C. It was founded by a man named John
 - D. It was built in New England
49. What nation was defeated in the French and Indian War?
- A. France
 - B. Iroquois
 - C. Spain
 - D. England
50. Why did Roger Williams decide to establish the colony of Rhode Island?
- A. He spoke out against the Pope and the leaders of Massachusetts were angry.
 - B. He did not think the religious laws were strict enough in Massachusetts.
 - C. He was banished from Massachusetts for not agreeing with the religious leaders.
 - D. The king needed another colony to ensure the French and Spanish would not try an invasion.

Revolutionary War Scavenger Hunt Page 1 of 5



HOME	OUR CLASS	BRAIN QUEST	THANKS	PROJECTS	COOL KID'S LINKS	THE TEACHER'S INBOX
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REVOLUTIONARY WAR INTERNET SCAVENGER HUNT

Make sure you sign our guestbook if you complete this scavenger hunt. Let us know how you did!

Click on the highlighted word in each question to travel to the site on which you will find the answers. If there is no highlighted word, then stay on the page you are presently viewing and search for the answer there. You may have to choose different links within a site to find the answers. It may be helpful to print out a copy of this hunt before you start.

INSTRUCTORS
For further instructions/information on this Scavenger Hunt, please click [HERE](#) and scroll down to the "R" section on the page.

PRELUDE TO REVOLUTION - THE CAUSES AND EVENTS

<http://www.geocities.com/EnchantedForest/Mountain/9112/RWHunt.html>

10/16/2001

1. What was signed in 1763? By whom was it signed?
2. What did it say? (try to use your own words to explain)
3. When was the Sugar Act passed? (Be sure to use the link highlighted in this question to find the answer, as it provides the answer to numbers 4-7 as well)
4. What was passed in 1765? Name 8 items which were taxed.
5. What happened on December 16, 1773?
6. What event happened on March 5, 1770?
7. Describe in your own words what happened on this day.
8. Who actually hung the two lanterns in the Old North Church on April 18, 1775?
9. What were the Intolerable Acts?
10. Name the 4 laws which were passed in this Act.

IMPORTANT PEOPLE OF THE REVOLUTION

11. On what date did Paul Revere make his historic ride?
12. Who went with Paul Revere on this ride?
13. On what night of the week did Revere make this ride?
14. The following quotes came from the time period during the Revolutionary War. Who said each of them?

"Don't fire unless fired upon, but if they mean to have a war, let it begin here."

"I only regret that I have but one life to lose for my country."

BATTLES OF THE REVOLUTIONARY WAR

Go to History Place and fill in the blanks with the appropriate words:

15. At dawn on April 19 about 70 armed Massachusetts militiamen stand face to face on Lexington Green with the British advance guard. An unordered ' _____ ' begins the _____.

16. After Lexington, where did the British go?

17. How far is it from Lexington, Massachusetts to Concord, Massachusetts?

18. What were the British and American losses (dead and wounded) at Bunker Hill?

19. Who was the commander of the British forces who ordered his troops to destroy the military stores at Concord in April of 1775?

20. What Revolutionary War battle was fought on October 7, 1780?

21. On what date was the battle of Trenton, NJ fought?

22. Where was Washington defeated on September 11, 1777?

23. Where was he defeated on October 4, 1777?

TRIVIA

24. What was one of the most commonly used (popular) weapons of the Revolutionary War?

25. What was the most powerful weapon used? Hint: Read the descriptions from the page linked above and "think" - the answer should become obvious to you as you read the descriptions!

26. Name two other weapons used in the Revolutionary War.

- 27. What young woman posed as a man so that she could serve for the American Army in the War for Independence?
- 28. What were the names of the two sisters who stole an important message from British soldiers and carried it to General Greene of the American Army?
- 29. Name one other woman who aided the cause of the American Army.

INDEPENDENCE!

- 30. Who made up the Committee of 5 men who drafted the Declaration of Independence?

Fill in the blanks to complete this sentence from the Declaration of Independence:
 We hold these truths to be self-evident, that all men are created _____, that they are endowed by their Creator with certain unalienable rights, that among these are _____, _____ and the pursuit of _____.

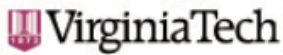
A NEW NATION

- 31. On what date was the Revolutionary War officially ended?
 - 32. On what date did Washington deliver his inaugural address in New York City?
 - 33. Who served as President after Washington?
 - 34. What events happened on March 4, 1789, and March 4, 1793?
-
-

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Click here to go back to Projects Menu

Appendix G: IRB Materials



Office of Research Compliance
Institutional Review Board
North End Center, Suite 4120, Virginia Tech
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Blacksburg, Virginia 24061
540/231-4606 Fax 540/231-0959
email irb@vt.edu
website <http://www.irb.vt.edu>

MEMORANDUM

DATE: June 30, 2015
TO: David Hicks, Brian Wade Miller
FROM: Virginia Tech Institutional Review Board (FWA00000572, expires April 25, 2018)
PROTOCOL TITLE: Juggling Influences: How a high-school teacher contends with competing influences when planning, implementing, and assessing a unit of instruction in a U.S. history course.
IRB NUMBER: 15-336

Effective June 30, 2015, the Virginia Tech Institutional Review Board (IRB) Chair, David M Moore, approved the New Application request for the above-mentioned research protocol.

This approval provides permission to begin the human subject activities outlined in the IRB-approved protocol and supporting documents.

Plans to deviate from the approved protocol and/or supporting documents must be submitted to the IRB as an amendment request and approved by the IRB prior to the implementation of any changes, regardless of how minor, except where necessary to eliminate apparent immediate hazards to the subjects. Report within 5 business days to the IRB any injuries or other unanticipated or adverse events involving risks or harms to human research subjects or others.

All investigators (listed above) are required to comply with the researcher requirements outlined at:

<http://www.irb.vt.edu/pages/responsibilities.htm>

(Please review responsibilities before the commencement of your research.)

PROTOCOL INFORMATION:

Approved As: **Expedited, under 45 CFR 46.110 category(ies) 6,7**
Protocol Approval Date: **June 30, 2015**
Protocol Expiration Date: **June 29, 2016**
Continuing Review Due Date*: **June 15, 2016**

*Date a Continuing Review application is due to the IRB office if human subject activities covered under this protocol, including data analysis, are to continue beyond the Protocol Expiration Date.

FEDERALLY FUNDED RESEARCH REQUIREMENTS:


Per federal regulations, 45 CFR 46.103(f), the IRB is required to compare all federally funded grant proposals/work statements to the IRB protocol(s) which cover the human research activities included in the proposal / work statement before funds are released. Note that this requirement does not apply to Exempt and Interim IRB protocols, or grants for which VT is not the primary awardee.

The table on the following page indicates whether grant proposals are related to this IRB protocol, and which of the listed proposals, if any, have been compared to this IRB protocol, if required.

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VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
An equal opportunity, affirmative action institution

MEMORANDUM

DATE: June 8, 2017 

TO: David Hicks, Brian Wade Miller

FROM: Virginia Tech Institutional Review Board (FWA00000572, expires January 29, 2021)

PROTOCOL TITLE: Juggling Influences: How a high-school teacher contends with competing influences when planning, implementing, and assessing a unit of instruction in a U.S. history course.

IRB NUMBER: 15-336

Effective June 8, 2017, the Virginia Tech Institutional Review Board (IRB) Chair, David M Moore, approved the Continuing Review request for the above-mentioned research protocol.

This approval provides permission to begin the human subject activities outlined in the IRB-approved protocol and supporting documents.

Plans to deviate from the approved protocol and/or supporting documents must be submitted to the IRB as an amendment request and approved by the IRB prior to the implementation of any changes, regardless of how minor, except where necessary to eliminate apparent immediate hazards to the subjects. Report within 5 business days to the IRB any injuries or other unanticipated or adverse events involving risks or harms to human research subjects or others.

All investigators (listed above) are required to comply with the researcher requirements outlined at:

<http://www.irb.vt.edu/pages/responsibilities.htm>

(Please review responsibilities before the commencement of your research.)

PROTOCOL INFORMATION:

Approved As: **Expedited, under 45 CFR 46.110 category(ies) 6,7**
Protocol Approval Date: **June 30, 2017**
Protocol Expiration Date: **June 29, 2018**
Continuing Review Due Date*: **June 15, 2018**

*Date a Continuing Review application is due to the IRB office if human subject activities covered under this protocol, including data analysis, are to continue beyond the Protocol Expiration Date.

FEDERALLY FUNDED RESEARCH REQUIREMENTS:

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The table on the following page indicates whether grant proposals are related to this IRB protocol, and which of the listed proposals, if any, have been compared to this IRB protocol, if required.

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Office of Research Compliance
Institutional Review Board
North End Center, Suite 4120
300 Turner Street NW
Blacksburg, Virginia 24061
540/231-3732 Fax 540/231-0959
email irb@vt.edu
website <http://www.irb.vt.edu>

MEMORANDUM

DATE: June 18, 2018
TO: David Hicks, Brian Wade Miller
FROM: Virginia Tech Institutional Review Board (FWA00000572, expires January 29, 2021)
PROTOCOL TITLE: Juggling Influences: How a high-school teacher contends with competing influences when planning, implementing, and assessing a unit of instruction in a U.S. history course.
IRB NUMBER: 15-336

Effective June 15, 2018, the Virginia Tech Institutional Review Board (IRB) approved the Continuing Review request for the above-mentioned research protocol.

This approval provides permission to begin the human subject activities outlined in the IRB-approved protocol and supporting documents.

Plans to deviate from the approved protocol and/or supporting documents must be submitted to the IRB as an amendment request and approved by the IRB prior to the implementation of any changes, regardless of how minor, except where necessary to eliminate apparent immediate hazards to the subjects. Report within 5 business days to the IRB any injuries or other unanticipated or adverse events involving risks or harms to human research subjects or others.

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(Please review responsibilities before the commencement of your research.)

PROTOCOL INFORMATION:

Approved As: **Expedited, under 45 CFR 46.110 category(ies) 6,7**
Protocol Approval Date: **June 30, 2018**
Protocol Expiration Date: **June 29, 2019**
Continuing Review Due Date*: **June 15, 2019**

*Date a Continuing Review application is due to the IRB office if human subject activities covered under this protocol, including data analysis, are to continue beyond the Protocol Expiration Date.

FEDERALLY FUNDED RESEARCH REQUIREMENTS:

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VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
An equal opportunity, affirmative action institution

Virginia Polytechnic Institute and State University Informed Consent for Participants

Case Study: Juggling influences: how a high-school teacher contends with competing influences when planning, implementing, and assessing a unit of instruction in a U.S. history course.

Principle Investigator: Brian Miller, Graduate Student, Curriculum and Instruction, Virginia Tech.

I. Purpose:

The purpose of this research to investigate the following questions:

1. How and to what extent does a teacher ascribe historical significance in their planning, implementation and assessment of instruction in a high-stakes setting?
2. What interactional relationships shape a teacher's decision-making process in terms of social studies content selection and the teaching of the content through a unit of instruction in a high-stakes, team-teaching environment?

This study will explore how a teacher plans, implements, and assesses an 11th grade U.S. history unit, investigating how the various interactional relationships impact not only curricular decisions, but also implementation and assessing as well. This research is part of a doctoral dissertation and will be published.

II. Procedure:

General Education Teacher:

You will participate in a pre-observation survey, a pre-observation interview (approximately 60 minutes), shorter pre-observation and post-observation interview (approximately 15 minutes each), and a post-observation interview (approximately 60 minutes). All interviews will be taped and transcribed. We will also look over a unit plan, including the unit test, which you have constructed for your United States history course. I would also like to observe you while you are teaching the unit we discussed during the first interview. Other than talking with me for at least three hours over the course of the next few months, your participation in this study will not require additional time or work.

Team Teacher:

You will participate in a pre-observation survey and a pre-observation interview (approximately 60 minutes). The interview will be taped and transcribed. I would also like to observe you while you are teaching the unit we discussed during the first interview. Other than talking with me for at least one hour over the course of the next few months, your participation in this study will not require additional time or work.

III. Risks:

There are minimal risks to participate in this study. Risks to participants are no greater than the risks associated with normal class planning, implementing, and assessing. Your choice to participate or not participate will in no way affect your standing within the department. The interviews and observations are for the strict purpose of research, not informal or formal evaluations. In addition, you have the right to withdraw from participation at any time simply by notifying the researcher in writing of your desire to withdraw.

IV. Benefits:

There are no direct benefits to you for participation in this study. No promise or guarantee of benefits has been made to encourage you to participate. Indirect benefits may include having a better understanding of your personal perceptions of history and helping educators better understand how interactional relationships can influence curriculum decision-making, teaching, and assessing.

V. Extent of Anonymity and Confidentiality:

The researcher will keep all data collected confidential, except as noted below. Only the researcher will have access to the data. Information gathered from the project may be used in reports, presentations, and articles in professional journals. However, participant names will not be used in any report, presentation, or article and identifying information will be changed so that data cannot be connected to individuals. Pseudonyms will be used and the participant will be allowed to choose their own pseudonym if they wish. No identifying characteristics of the participant will be revealed in any reporting of the data other than the years of experience. Despite efforts to preserve it, anonymity may be compromised. The final research report will be given to the Loudoun County Public Schools Research Office. Since this research involves a single-case study, it may be possible for others to be able to identify you as a participant based on your demographics and/or responses to interview questions.

All data, including recorded interviews, will be retained for a period of not more than five years in secure locations under the supervision of the primary researcher. After that time, the recordings will be erased and the other data destroyed.

It is possible that the Institutional Review Board (IRB) may view this study's collected data for auditing purposes. The IRB is responsible for the oversight of the protection of human subjects involved in research.

In some situations, it may be necessary for an investigator to break confidentiality. If child abuse is known or strongly suspected, investigators are required to notify the appropriate authorities. If a subject is believed to be a threat to herself/himself or others, the investigator should notify the appropriate authorities.

VI. Compensation:

Participants will not be compensated for participating in this study.

VII. Freedom to Withdraw

Participants are free to withdraw from this study at any time without penalty. You are free not to respond to any research situations that you choose without penalty. You are free to request that any unit plans, discussion transcript, or classroom recording of yours be removed from the data set without penalty. There may be circumstances under which the investigators may determine that you should not continue to be involved in the study.

VIII. Subjects' Responsibilities

I voluntarily agree to participate in the research project. I have the following responsibility: do not modify your normal class behaviors because a researcher is present.

IX. Subject's Permission

I have read and understand the Informed Consent and conditions of this project. I have had all of my questions answered.

I hereby acknowledge the above and give my voluntary consent for the collection and analysis of the following materials (please initial all that apply):

_____ Transcripts of all recorded interviews

_____ Photocopied unit plans, including the unit test, that have been completed for my U.S. History class

_____ Notes from classroom observations as well as more informal observations

Participant's Signature

Date

Should I have any pertinent questions about this research, you may contact:

Dr. David Hicks

hicks@vt.edu

Brian Miller

brian.miller@lcps.org

(703) 431-8897

Should you have any questions or concerns about the study's conduct your rights as a research subject, or need to report a research-related injury or event, you may contact the VT IRB chair, Dr. David M. Moore at moored@vt.edu or (540) 231-4991.

You will be provided with a complete copy or duplicate of the original of the signed Informed Consent.