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The “Document-Based Lesson”: Bringing Disciplinary Inquiry into High School  
History Classrooms with Adolescent Struggling Readers

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### Abstract

This article describes an attempt to bring disciplinary historical inquiry into the social studies classroom. This work emerges from a five-school six-month intervention in San Francisco, “Reading like a Historian”, which found main effects for student learning across four quantitative measures: historical thinking, factual knowledge, general reasoning, and reading comprehension. The purpose here is to describe the pedagogical practises that were at the heart of the intervention, in particular, a lesson structure that we call the *Document-Based Lesson*. The Document-Based Lesson organized existing forms of social organization that typify social studies classrooms (e.g. lecture, recitation, seatwork, group-work, whole-class discussion), into a predictable and repeatable sequence that engaged students in the processes of historical inquiry. Rather than uproot the conventional norms and structures that define classroom behaviour, we preserved the traditional role of the teacher and the signature activities that stand as landmarks of social studies instruction. Moreover, by providing classroom-ready materials and activities that married content knowledge and disciplinary inquiry, the Document-Based Lesson attempted to reconcile the fundamental tension in history instruction between depth and coverage.

“Fifth grade was when we started with the [text]books. And it was pretty much, answer the red square questions, explain a little, red square questions, explain a little . . . It was just like, if the red square question was here, you knew [the answer] was somewhere around that area right there. And you could just look for the answer and copy it down and you got full credit for it. So you didn't have to read. I don't know if they cared or not, but that's the way everybody did it”. ---Rosa, 8<sup>th</sup> grader, describing textbook work in social studies class (Greenleaf et al., 2001: 101).

When asked to describe their experiences in high school history classes, the majority of respondents in a telephone survey chose a single word: “boring” (Rosenzweig, 2000). Perhaps this response should not be surprising. The US experience in history has been characterized by dusty textbooks, rote memorization, and teachers who drone---like Ben Steiner in *Ferris Bueller's Day Off*---about tariff bills in the Great Depression. Despite a century of efforts to infuse the history classroom with relevance, problem-solving, active learning, and engaging resources, the same forms of instruction have persisted, unfazed. The reasons for this “persistent instruction” (Cuban, 1982) lie in the real and often pedestrian realities of school: 50 minute periods, classes teaming with 35 or more students, pressure to prep students for exams that test factual recall, teacher exhaustion. Students’ literacy levels pose an additional challenge to history instruction reform, as calls to design instruction around primary sources run up against the reality that 25% of the nation’s 8<sup>th</sup> and 12<sup>th</sup> graders scored below ‘Basic’ on the National Assessment of Educational Progress exam in reading (Grigg et al., 2007, National Center for Education Statistics, 2009). Social studies reformers, whether promoting the use of primary sources or encouraging teachers to tie content to contemporary problems, have mostly

overlooked the realities and myriad demands of instruction. The result is a graveyard of failed reforms (Hertzberg, 1981, Jenness, 1990).

The most vigorous effort to reform history instruction in the US occurred during the 1960s and 1970s. The New Social Studies movement, inspired by Jerome Bruner's *The Process of Education* (1960) and funded by post-*Sputnik* federal largesse, hoped to revolutionize instruction by designing curriculum that emphasized discovery learning and inquiry, and by positioning students as creators of knowledge. The movement, however, was short-lived (Brown, 1996, Bruner, 1983, Dow, 1991). Some approaches, like Man: A Course of Study (MACOS), an interdisciplinary approach to social life that leaned heavily on anthropological research, met with political resistance from critics who suspected designers of ulterior motives tied to secular humanism and cultural relativism (Dow, 1991). Yet, even approaches that focused on traditional topics in the history curriculum failed to take hold.

The Amherst History Project began publishing curriculum in 1963 that centered on student investigations of open-ended historical questions. Each unit included multiple, conflicting primary sources that engaged students in the core epistemological debates that animate the discipline. The project partnered with universities and enjoyed federal grant support (Brown, 1996, Hertzberg, 1981). Yet, ten years later, when the National Science Foundation funded three studies to evaluate the status of the new curriculum, reviewers found few traces of inquiry-based instruction in US classrooms (Ponder, 1979, Wiley and Race, 1977, Shaver, et al., 1978). By the late 1970s, history instruction in secondary schools largely consisted of survey courses dominated by lecture and expository teaching, where students were expected to memorize facts (Beyer, 1994, Goodlad, 1984, Silberman, 1970).

The spirit of curricular reform that swept through the US in the 1960s and 1970s also leapt across the Atlantic (cf. Booth, 1994, Wilschut, 2010). British educators, in particular, embraced Bruner's (1960) notion of a "spiral curriculum" whereby students encountered a discipline's central concepts repeatedly in the context of new and increasingly sophisticated content. Established in 1972, the Schools Council Project "History 13-16" sought to present history as a "form of knowledge", to make transparent how historians reasoned about evidence and constructed accounts of the past (Hirst, 1973, Shemilt, 1983). Course content did not follow a chronological sequence, but rather was selected to illustrate key historical structures (e.g., change and continuity, causation, historical empathy).

The History "13-16" syllabi did not survive the ferocious debates that accompanied the establishment of the National Curriculum in the early 1990s. In language that once again echoed across the Atlantic Ocean, the courses were pilloried for minimizing the importance of historical facts. Today, students aged 11-14 take courses that sweep through nine centuries of British history. Only non-compulsory courses for students 14-16 resemble the offerings of the Schools Council. This "compromise" did little to temper the fiery rhetoric that continues to characterize discussions about history curriculum (cf. Evans, 2011). Moreover, it failed to reconcile the tenacious dichotomy between disciplinary inquiry and historical facts.

My purpose in this article is to describe yet another attempt to change the social studies classroom. This work emerges from a five-school six-month intervention in San Francisco, "Reading like a Historian", which found main effects for student learning across four quantitative measures: historical thinking, factual knowledge, general reasoning, and reading comprehension (see Appendix; Reisman, 2011b). This study represented the first extended

curriculum intervention in disciplinary historical reading. Drawing on three decades of small-scale and qualitative studies (e.g., Afflerbach and VanSledright, 2001, Hynd, 1999, Rouet et al., 1996, Stahl et al., 1996), as well as on key research in adolescent reading comprehension instruction (e.g., Biancarosa and Snow, 2006, Carnegie Council on Advancing Adolescent Literacy, 2010, Heller and Greenleaf, 2007; National Institute for Literacy, 2007) we designed a curriculum that targeted discrete strategies of historical reading to enable students to engage in substantive inquiry with sources.

The purpose here is to describe the pedagogical practises that were at the heart of the intervention, in particular, a lesson structure that we call the *Document-Based Lesson*. Unlike previous attempts, which set out to revolutionize classroom life by endowing both teacher and student with fundamentally different roles, the Document-Based Lesson emerged from the premise that instructional reform had to accommodate what Tyack and Tobin (1994) termed the intractable “grammar of schooling.” We organized existing “activity structures” (cf. Gump, 1967, Stodolsky, 1998), or forms of social organization that typify social studies classrooms (e.g. lecture, recitation, seatwork, group-work, whole-class discussion), into a predictable and repeatable sequence that engaged students in the processes of historical inquiry. Moreover, by providing classroom-ready materials and activities that married content knowledge and disciplinary inquiry, the Document-Based Lesson attempted to reconcile the fundamental tension in history instruction between depth and coverage. Our hope was to bridge between the lofty and heady ideals of the New Social Studies and the Schools Council, on the one hand, and the well-documented constraints of public school teaching in large urban districts, on the other.

This essay begins by revisiting the strengths as well as the shortcomings of the New

Social Studies. I go on to describe the empirical, theoretical, and intellectual moorings that informed the creation of the Document-Based Lesson and then illustrate the approach with two examples. I end by addressing unanswered questions and challenges to the Reading Like a Historian approach. In short, by grounding the design of the Document-Based Lesson in the realities of classroom practice, as well as in the cumulative findings from three decades of research on historical thinking and reading comprehension, I argue that this approach constitutes a viable alternative to traditional history instruction.

#### The New Social Studies and the Amherst History Project

A number of forces converged in the early 1960s to create an unprecedented moment in educational reform. *Sputnik* launched a stream of federal funding for education that resulted in innovative reforms in math and science that eventually made their way into the social studies (Bruner, 1983, Dow, 1991). Scholars from a range of disciplines showed renewed interest in the problems of curriculum and devoted themselves to developing classroom materials that reflected the forms of inquiry in the social sciences. By 1967, over 50 national curriculum projects had been established and were working on curriculum materials in geography, history, economics, public policy issues, and world affairs (Hertzberg, 1981). Two centres---one at Amherst and one at Carnegie-Mellon---worked with local schools and teachers to develop history curriculum using primary sources. While dealing with a range of content, these projects all shared a commitment to designing instruction around discovery and inquiry. Reformers wished to put raw materials in students' hands so that they might engage in the processes of scholarly investigation and induce the deep principles and underlying structure of each discipline. Instruction would be driven by the student's innate curiosity, as teachers guided them to higher



levels of sophistication.

The Amherst History Project, directed by historian Richard H. Brown, was unique among the New Social Studies in its exclusive focus on US history. Though Brown's tenure as director began in 1964, the Amherst History Project (AHP) had been underway for five years at that point, and consisted of small groups of teachers writing curriculum units during summer sessions at Amherst College near Northampton, Massachusetts. An infusion of federal grant money 1964 ushered in a new phase for the project, and between 1965--1970 the joint offices at Amherst and the Newberry Library in Chicago ran twenty-one week-long workshops for classroom teachers, who designed many of the materials in collaboration with professional historians (Brown, 1996). The units embodied the key principles of inquiry and discovery shared by all the New Social Studies projects. As Brown said in a 1965 address to the National School Boards Association, "If the goal of formal education is to equip one to educate himself through life---and who would dispute that that is its goal?---it makes infinitely more sense to train the student to be a sophisticated and careful inquirer than it does to fill him full of facts" (1965: 446).

To this end, AHP units did not concern themselves with chronology as much as in-depth inquiry about a particular historical question. They relied on the principle of "post-holing" to guide curriculum design. The metaphor comes from fence-building: just as a rancher chooses the best location to dig into the ground and plant a post, teachers would decide when to pause in their chronological journey and allow students to "dig" into a particular historical topic (Beyer, 1994, Brown, 1996). The dense curricular units, covering topics ranging from the Battle of Lexington to the dropping of the atomic bomb, constituted at least a week of instruction, during which students would read packets of primary sources and ponder the nature of historical

knowledge (Bennett, 1970). Speaking in 1965, Brown revealed that this organizing principle was not ideal: “We are frankly interested in the possibility that a history course might move more effectively not from A to Z but from the inside out, with a student starting somewhere, perhaps anywhere, and moving backward and forward in time in truly inductive fashion, as inquiry leads him” (1965: 447).

This was not to be the case. The developers woefully underestimated the intransigence of historical chronology as the organizing principle of classroom instruction (Sheurman and Reynolds, 2010). Reflecting on the project thirty years later, Brown admitted as much: “We left it entirely to the teachers to deal with such knotty problems as what should link the post-holes, what to do once a unit was completed, or what the relationship was between the units and the narrative of American history that could be found in the text or elsewhere” (1996: 272). Despite the reformers’ intent to revolutionize the history classrooms, the units quickly became supplementary materials that were rarely used (Brown, 1996, Shaver et al., 1978).

Furthermore, perhaps as a reaction to the behaviouristic slant of typical classroom materials, AHP designers were wary of being overly prescriptive toward teachers. In contrast to efforts in physics reform that strove to create “teacher proof” materials (cf. Bruner, 1983, Dow, 1991), these history reformers deliberately prepared “non-package packages” that left decisions about pedagogical strategies largely in the hands of teachers (Brown, 1996). The result was that teachers had little support as they attempted to implement the materials in contexts that were less than ideal.

The materials themselves would have challenged even the most seasoned teacher. The ambitious units not only introduced students to the extensive primary and secondary literature on

a given topic, but also asked them to consider the nature of historical knowledge. For example, the first of three sections of “What Happened on Lexington Green?”, a 55-page workbook about the first battle of the American Revolution, consisted of 23 different primary sources, all designed to help students answer the question of who fired the first shot between Massachusetts minutemen and British regulars on April 19, 1775. The next section included seven textbook excerpts and nine passages by professional historians. The final section began with extended excerpts by Walter Lippman and Carl Becker and abstract questions about the nature of facts; these were followed by nine additional readings---ranging from Howard Fast’s *April Morning* to Plato’s “Allegory of a Cave”---which raised questions about the nature of social science methods and, ultimately, reality. The workbook asked, “If the historian does function more as an artist, can he ever know that he is not creating a past, a reality that never existed? In short, then, what is reality and how does one find it?” (Bennett, 1970: 49). The authors were indeed in search of reality, but not necessarily the reality of the average classroom, with thirty or more students reading at a variety of levels.

#### Design Principles of the “Document-Based Lesson”

The Amherst History Project made a compelling case for historical inquiry. Instead of closed “red box questions”, students would engage in vigorous open-ended investigations. Instead of bland textbook prose, they would encounter the lively voices of historical actors in original sources. Instead of memorizing facts, they would learn that facts are constructed and fragile. Yet project developers underestimated the powerful forces that dictate the reality of classroom instruction and prevent innovation from taking root. State curricula, 50-minute periods, and textbooks shape and constrain what teachers do. Myriad efforts to reform these

structures have foundered on these entrenched structures (cf. Cuban, 1982, 1986). To effect change, reformers must acknowledge classroom constraints, accommodate them, and work creatively to infuse the school day with intellectually stimulating experiences. The design principles underlying the Document-Based Lesson sought to address these very challenges, and it is to these principles that we now turn.

*Daily classroom-ready materials*

We began our work with the premise that “post-holing” might be good in theory but deeply flawed in practise. Teaching is a daily activity that requires daily materials. Each day, the average teacher prepares five lessons for approximately 160 students. Harried teachers have little time to design curriculum materials based on heady principles. A recent study comparing comprehensive school reform programmes found that providing daily instructional materials and clear directions for implementation produced the greatest instructional change (Correnti and Rowan, 2007, Rowan and Miller, 2007). Given the demands on teachers’ time, this finding seems self-evident. The Reading like a Historian curriculum provided teachers with orderly, classroom-ready, chronologically sequenced lessons that did not require them to make extraordinary efforts outside the school day.

*Predictable “Activity Sequence”*

We further helped teachers bring historical inquiry into their classrooms by introducing the element of predictability, which we achieved by creating a singular but flexible *Activity Sequence*. In defining the *Activity Sequence*, we drew on the work of ecological psychologists (cf. Kounin et al., 1966, Kounin and Sherman, 1979, Gump, 1967) who, in the 1960s, began studying how certain classroom activities and arrangements shaped teacher and student

behaviour. These early studies used the “activity segment”---the particular instructional format, materials, participants, and behavioural expectations at a given moment---as their unit of study. To the extent that multiple activity segments occur simultaneously, the “activity structure” described the major divisions of classroom activity in a lesson (Stodolsky, 1989).

The most salient feature of classroom instruction to emerge from this body of work is its *predictability*. Whereas the early studies of Kounin and Gump examined classroom activity independent of subject matter, Stodolsky (1998) found that subject matter often predicted the type and range of activity structures that teachers employed. Comparing fourth-grade math and social studies classrooms, Stodolsky found considerably more variation in social studies instruction, but this diversity mapped onto distinct disciplines. Whereas psychology, anthropology, and interdisciplinary topics were often taught using group-work and problem-solving (indeed, some of the classrooms in her sample were using the New Social Studies MACOS materials!), history and geography instruction predominantly relied on the textbook and teacher-centred lecture and recitation (Stodolsky, 1998: 74).

In our design of the Document-Based Lesson, we capitalized on the predictability that teachers and students have come to expect of social studies. We recruited the same “activity structures” that have characterized history instruction for decades: lecture, recitation, teacher-led discussion, and seatwork. Our *Activity Sequence* consisted of three distinct activity structures that appeared in the same order in each lesson: (1) establishment of background knowledge, (2) historical inquiry with multiple documents, and (3) discussion. This sequence of activities remained constant from lesson to lesson, although the specific activity segments often varied. Figure 1 illustrates the variation in activity segments in three sample lessons.

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Insert figure 1 about here  
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*Background knowledge.* Each lesson began with a review of relevant background knowledge, which was presented to students in a range of recognizable formats---including lecture, video, and textbook questions. This information acquainted students with the period under investigation and, in some cases, refreshed their memory of the historical context. The content was intentionally selected and *limited* to information that would prepare students to engage with the historical documents (Reisman and Wineburg, 2008). In that sense, we primed students' background knowledge in the same way that an elementary teacher activates students' prior knowledge before reading a story. Research on reading comprehension has demonstrated the power of prior knowledge in helping readers generate information to fill the gaps in incoherent texts and to build deeper conceptual understanding (McNamara et al., 1996, Voss and Silfies, 1996). Whether reading a letter by Thomas Jefferson or a story about a trip to the zoo, the processes of comprehension and meaning-making are facilitated by recognition and familiarity.

Simultaneously, however, the background knowledge in the Document-Based Lesson often did double-duty, serving as an epistemological straw man by offering students an incomplete or flawed account of a particular event. Though the more dramatic examples came from popular movies or textbook excerpts, we ultimately hoped students would come to view *any* single account as necessarily incomplete. We designed our lessons to complicate simplistic

narratives and to emphasize the *intertextuality* of disciplinary historical reading (cf. Hexter, 1971, Mink, 1966). As students read additional perspectives and gathered new information from historical sources they were encouraged to remain critical of the original account that launched the lesson and to be prepared to challenge it.

*Historical inquiry.* In each lesson, students read between two and five primary documents that shed light on a historical question from several perspectives. Students worked individually or in small groups to answer questions or to fill in graphic organizers about readings. Documents were deliberately selected to offer conflicting interpretations, and were intentionally sequenced to force students to change their minds and revise their hypotheses. For example, because Document A of a lesson on John Brown presented the abolitionist as a deeply principled and moral man (and not a “misguided fanatic”, as Abraham Lincoln reportedly claimed), we selected a Document B that would offer a conflicting perspective: Frederick Douglass, in his autobiography, claimed to have advised Brown to abort the raid on Harper’s Ferry, warning that such a radical step was dangerous and doomed, and would effectively destroy the moderate achievements of the Underground Railroad. These conflicting accounts forced students to evaluate truth claims, consider context, and make reasoned judgments as they constructed an account of the past.

Instructional supports accompanied the primary sources to assist students in reorienting themselves to the documents. Although adolescents enter the classroom with certain assumptions about historical texts—namely, that they are authoritative accounts that need not be problematized (cf. Lee, 2005, Shemilt, 1983, Wineburg, 1991a), a body of research has identified instructional techniques that can prompt students to reason historically across multiple

documents. For example, researchers found effects for writing prompts that ask for an argument (Wiley and Voss, 1999), for the explicit request for sourcing information (Britt and Aglinskas, 2002), and for the juxtaposition of two contrasting arguments about an historical event (Wolfe and Goldman, 2005). These findings informed our design of the supplementary materials (e.g., worksheets, graphic organizers) that accompanied the primary sources.

*Whole-class discussion.* Finally, students engaged in whole-class discussion about the central historical question, using evidence from the documents to substantiate their claims. Sociocultural learning theory maintains that discussion enables students to practice and internalize higher-level ways of thinking and reading (Lave and Wenger, 1991, Rogoff, 1990, Vygotsky, 1978, 1981). In this case, discussions were also opportunities for students to develop their historical knowledge as they articulated their shifting claims, reexamined the available evidence, and interrogated their classmates' reasoning (Brown and Campione, 1994, Wells, 1999).

In sum, the Document-Based Lesson rejected the classic dichotomies of classroom reform that pit textbooks against primary sources, content coverage against depth, passive learning against active engagement, and the accumulation of knowledge against the development of skills. Whereas the Amherst History Project developers hoped to banish the textbook, we incorporated it into most lessons. Whereas Richard H. Brown dreamed of a day when history instruction would relinquish its dependence on chronology and start “somewhere, perhaps anywhere, and moving backward and forward in time”, we respected the historical chronology of the survey class and encouraged teachers to draw narrative connections between lessons.



Furthermore, rather than heap scorn on the discourse pattern of schooling known as “IRE” (cf. Cazden, 2001, Meehan, 1979), in which the teacher *initiates* a conversational exchange, the student *responds*, and the teacher *evaluates*, we recruited this structure and attempted to use it to our advantage. Teachers remained active leaders of classroom activities throughout each lesson, often relying on IRE sequences to review students’ content knowledge and to redirect discussion to the documents and to the historical context (Reisman, 2011a). In short, rather than attempting to revolutionize classroom life, we sought to embed historical inquiry into its well-worn structures. The novelty of the Document-Based Lesson lay in its rearrangement of the familiar into a repeatable instructional order (see figure 2).

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Insert figure 2 about here

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### *Disciplinary reading instruction*

Perhaps the most radical element of the Document-Based Lesson was its attempt to address students’ literacy development and reading comprehension at the same time as teaching them new historical content. Recent reports on literacy in the USA place the kinds of materials developed by the Amherst History Project far beyond the comprehension skills of the average high school student (Grigg et al., 2007, National Center for Education Statistics, 2009). Indeed, teachers in urban classrooms, intent on covering the material, have been known to read the textbook aloud to students who struggle with basic comprehension (Schoenbach et al., 1999). Some social studies curriculum publishers have addressed the crisis in literacy by trying to circumvent it, creating activities that invite students to draw knowledge posters, compose songs,

or engage in role-plays. Teachers understandably hesitate to use original primary source materials, which, given their arcane syntax, unfamiliar vocabulary, and unconventional spelling, are doubly taxing to struggling readers. The Document-Based Lesson tackled the challenges of adolescent literacy head on.

To make the documents visually and cognitively accessible to students below grade level, we took the radical step of physically tampering with them---a decision that many archivists would consider unthinkable, but one that we considered essential. Reports on adolescent literacy maintain that students need exposure to a variety of texts in order to develop the advanced literacy skills that pave the way to tertiary education (Biancarosa and Snow, 2006, Heller and Greenleaf, 2007). Yet, recent surveys of 12<sup>th</sup> graders found that many have gone through four years of social studies without encountering a single text besides the classroom textbook (cf. Fitzhugh, 2004). Our adaptations put students in touch with diaries, letters, speeches, and government reports---rich supplements to the intellectually thin gruel of the classroom textbook.

We modified documents according to three principles of adaptation: focusing, simplification, and presentation (cf. Wineburg and Martin, 2009). Each source was first excerpted so that students only read the portion of the document that shed light on the historical question under investigation. We then simplified vocabulary, conventionalized spelling and punctuation, and reordered sentences into straightforward sentence-verb constructions. In all our adaptations, we attempted to preserve the document's original language and tone. The extent of the modifications abated over the course of the year, as students became more comfortable reading primary sources and as increasingly modern documents required fewer adaptations. Finally, we took care to present documents in ways that would invite, rather than intimidate,

struggling readers. Documents were no longer than 250 words, written in large font and surrounded by comforting white space. Though originals were available to all students, these adaptations were the only way struggling readers could be exposed to the voices of Thomas Jefferson, Emma Goldman, Henry Frick, and Frederick Douglass.

Yet, primary sources, alone, cannot generate disciplinary historical inquiry. In her evaluation of Teaching American History programmes, Westhoff (2009) found that many teachers used sources either to illustrate points in the textbook or to promote interpretations that were decidedly ahistorical. In one lesson that Westhoff observed, students were encouraged to assume that Marcus Garvey's "Declaration of the Rights of Negro Peoples of the World" represented the perspective of all African Americans in the 1920s; in another, teachers asked students to rewrite the Seneca Falls Declaration of Sentiments from a modern-day perspective. Far from historical inquiry, these activities sometimes reinforced students' notions of an undifferentiated past that could be immediately accessed and understood through a single text.

To avoid the kind of presentism that Westhoff found, we departed from the familiar. We cast social studies teachers in the role of reading instructors. Explicit strategy instruction (cf. Duke and Pearson, 2002, Harris and Graham, 1996, Nokes and Dole, 2004, Pearson and Gallagher, 1983)---a method familiar to Language Arts teachers, but utterly foreign to history and social studies classrooms---maintains that cognitive acts such as reading strategies remain invisible unless they are brought to the surface and named (cf. Collins et al., 1991, Collins et al., 1989). Just as apprentices observe experts as they learn their craft, students must repeatedly *see* teachers practise the strategies of disciplinary reading. Over time, the approach emphasizes a gradual shift of cognitive responsibility, as students begin to practise disciplinary reading with

teacher guidance, in small groups, and ultimately, individually. Initially, however, students must see the teacher think aloud while reading historical documents, particularly if they have never seen anyone read in this way.

This activity structure puts teachers in front of the class, not as authoritative lecturers, but---more vulnerably---as readers. Rather than encouraging interactive student participation, cognitive modeling requires that teachers first model expert reading without falling back on the more familiar activity structure of recitation. In this sense, the activity runs counter to the culture of social studies classrooms, where student participation is often viewed as a sign of engagement. Cognitive modeling, in contrast, draws a clear distinction between novice and expert practise by displaying sophisticated strategies with clarity and precision, so that students can internalize and begin to practise them. Student participation, in this context, would blur the line between expert and novice and distract from the central purpose of the activity: the demonstration of expert historical reading. Without question, this activity initially felt strange to both teachers and students. Yet, in the absence of such explicit instruction, students tend to view primary sources as they do the textbook---authoritative accounts that require no interrogation.

In the Document Based Lesson, the teacher demonstrated the strategies of disciplinary historical reading using an overhead projector and a marker. Our curriculum highlighted four strategies of expert historical reading: *sourcing* (considering the document's source and purpose), *contextualization* (placing the document in a temporal and spatial context), *corroboration* (comparing the accounts of multiple sources against each other), and *close-reading* (considering an author's use of language and word choice) (Martin and Wineburg, 2008, Wineburg, 1991a, b, 1994). The teacher, for example, underlined the source note on Emma

Goldman’s account of the 1892 Homestead strike and asked if it was reliable, given that it was written in 1931 and given that her fellow anarchist Alexander Berkman decided to murder plant manager Henry Frick. The teacher later practised *close reading* on Henry Frick’s account, which was published in the newspaper seven days after the strike. The teacher circled the words that painted a negative image of the strikers, and wondered aloud whether the people who read the newspaper sympathized with Frick or with the strikers. Sorting through the conflicting claims in both documents, the teacher modeled the strategy of *corroboration*, and asked what---if anything---could be gleaned from these accounts about the events of the Homestead strike. Explicit strategy instruction using cognitive modeling effectively initiated both teachers and students into the processes of historical inquiry.

These three design principles: available classroom-ready materials, a predictable “Activity Sequence”, and disciplinary reading instruction, guided our development of all the Document-Based Lessons in the Reading like a Historian curriculum. In the following section, I illustrate these principles with two examples.

#### Example 1: First Great Awakening

##### *Overview*

The First Great Awakening, an evangelical revival movement from the mid-18<sup>th</sup> century, appears in the *History-Social Science Content Standards for California Public Schools* for 11<sup>th</sup> grade. Tucked away in Standard 11.3, which mandates that students “analyze the role of religion played in the founding of American, its lasting moral, social and political impacts, and issues regarding religious liberty”, is a second bullet that asks students to “analyze the great religious revivals and the leaders involved in them, including the First Great Awakening, the Second Great

Awakening, the Civil War revivals, the Social Gospel Movement, the rise of Christian theology in the nineteenth century, the impact of the Second Vatican Council, and the rise of Christian fundamentalism in current times” (p. 48). An 11<sup>th</sup> grade textbook covers the Great Awakening in the following passage:

### **The Great Awakening**

In the 1730s and 1740s, a religious revival called the **Great Awakening** swept through the colonies. In New England and the Middle Colonies, ministers called for “a new birth,” a return to the strong faith of earlier days. One of the outstanding preachers of the Great Awakening was **Jonathan Edwards** of Massachusetts. People found his sermons powerful and convincing.

The English preacher **George Whitefield**, who arrived in the colonies in 1739, helped spread the religious revival. During a two-year tour, Whitefield electrified worshipers in churches and open fields from New England to Georgia. The Great Awakening led to the formation of many new churches, especially in the Southern backcountry. (Appleby, Brinkley, and McPherson, 2000: 113)

Lest teachers worry that this short passage would fail to prepare students for the state assessment, the following question appeared on the 2006 Grade 11 U.S. History-Social Science Standards Test (California State Department of Education, 2008: 12):

**The First Great Awakening of the 1730s and 1740s was *primarily* a**

- A movement to increase colonial loyalty to the British monarchy.
- B revival of evangelical religion that spread through the colonies.
- C process of assimilating immigrants into colonial American culture.
- D period of economic prosperity brought about by colonial trade.

The correct answer, of course, is B, though it would be a stretch to claim that this question measures students’ capacity to “analyze the great religious revivals and the leaders involved in them”.

Missing from the question and the textbook's lifeless rendition are the very contextual factors that render the First Great Awakening a pivotal historical movement. Students have no opportunity to visualize a revival, to hear the religious fervor of a farmer who believed his soul had been saved. Nor are they asked to consider why poor whites and slaves in the 1740s might have been especially drawn to the promise of salvation. The textbook offers no evidence to convince students why people found Jonathan Edwards "powerful and convincing," or how Whitefield "electrified" worshipers. Nor does the passage mention that these early rebellions against Anglicanism and Congregationalism sowed anti-authoritarian seeds that would burst forth in the American Revolution. Our Document-Based Lesson, on the other hand, tried to present the Great Awakening as a historical inquiry that developed students' disciplinary literacy while immersing them in the rich historical context of the 1740s.

### *Background knowledge*

Whitefield may have electrified audiences in 1740, but the fact moves few students in 2010. If the goal of inquiry is to engage students in the pursuit of knowledge, the seeming irrelevance of the First Great Awakening presented a formidable obstacle. In designing the background knowledge portion of the lesson, we sought, as quickly as possible, to populate the 1740s with real people. We began the lesson with a three-minute video clip from the PBS series *Africans in America* (Bagwell, 1998) that highlighted the appeal that the Great Awakening's message of salvation held for workers and servants. The clip's short montage of paintings and etchings helped students visualize the fervor of the revivals and the sheer numbers that attended. We followed the video with a three-slide Powerpoint lecture that placed the Great Awakening in the broader historical context. The lecture established three points: 1) prior to the Great

Awakening, the Anglican and Congregationalist Churches dominated religious life in the colonies; 2) the Great Awakening resulted in the growth of Presbyterianism, Methodism, and Baptism; 3) the Christianity promoted in the Great Awakening promised that anyone could be “born-again”; church leadership need not decide who deserved salvation. In both the video and the lecture, we tried to emphasize the appeal of the Great Awakening to the ordinary colonist.

All told, the establishment of relevant background knowledge occupied less than ten minutes of class time. Obviously, much more could be said about the Great Awakening. Yet, our primary goal was to prepare students to engage in inquiry---to cultivate an interest when, before class, none existed. We were confident that students’ historical knowledge would continue to develop over the course of the lesson. The relationship between background knowledge and inquiry-based reading is iterative. Students need background knowledge to understand the references in historical documents, but the same historical documents shed light on and potentially expand their understanding of the historical context. As British researchers Dickenson, Gard, and Lee explain: “Relating evidence to its context and testing the evidence are not separable activities, they are interdependent (how could evidence be tested without knowledge of its contexts?) and they are learned *pari passu*” (1978: 15). In preparing the Document-Based Lesson, we provided students with the minimum information they needed to engage with the documents, while recognizing that the act of inquiry would *build* additional historical knowledge.

### *Historical inquiry*

We built the Great Awakening investigation around a question that students would find immediately accessible: “Why was George Whitefield so popular”? We hoped to channel



adolescents' heightened awareness of social status into legitimate questions about the beliefs and experiences of colonists in the 1740s. Although the question focused on a single historical figure, the materials in the lesson pointed students to the broader context of the 1740s. Three documents appeared in the Great Awakening lesson, each no longer than 225 words. The first, written by Ben Franklin, presented Whitefield through the eyes of his admiring yet skeptical, friend. Franklin (1793) attended one of Whitefield's sermons, silently vowing to resist his plea for donations. But instead he astounded himself by emptying his pockets "wholly into the collector's dish, gold and all" in response to Whitefield's mesmerizing oratory, which Franklin estimated could be heard clearly by over thirty thousand people. In Franklin's account, Whitefield emerged as a powerful and effective speaker who used his gifts to convince the most reluctant listener to open his pockets (see figure 3).

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Insert figure 3 about here  
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In the second document, a Connecticut farmer named Nathan Cole described his experience of finding salvation and becoming born-again after hearing Whitefield speak: "And my hearing him preach gave me a heart wound; by God's blessing my old foundation was broken up, and I saw that my righteousness would not save me" (Cole, 1740, in Walker, 1897: 89-92). The document portrayed the colonists listening in "trembling fear", fearing damnation and desperate for salvation. Whereas in Cole's eyes, Whitefield "looked almost angelic", the third and final document offered a critical view of Whitefield from an Congregationalist minister. Nathanael Henchman who wrote a letter to Whitefield accusing him of sowing "the pernicious

seeds of separation, contention and disorder among us” and destroying “not only at the peace and good order, but the very being of these churches” (Henchman, 1745/2000). The minister’s letter highlighted the rebellious spirit of Whitefield’s preaching, and placed the movement in the context of previously unchallenged authority of the Anglican and Congregationalist churches.

By design, the lesson’s three documents pointed students in different directions as they began to consider the reasons behind Whitefield’s popularity in the 1740s in the American colonies. Whereas Franklin’s account suggested a dynamic speaker who mesmerized enormous crowds, Cole’s account suggested that these audiences were also spiritually lost and seeking redemption. The minister further complicated the picture by suggesting that Whitefield stirred the colonists’ latent rebelliousness. Woven together, the three perspectives create a compelling picture of the colonies in the 1740s.

To help students gain entry to these complex documents, the inquiry began with teacher modeling how to read the Franklin document historically. The teacher placed a transparency of the Benjamin Franklin document on the overhead, and began reading and thinking aloud as students observed. The source note on the Benjamin Franklin document read: “Source: *The Autobiography of Benjamin Franklin*, 1793. Ben Franklin was a good friend of George Whitefield, though he did not agree with his religious beliefs”. The teacher thought aloud:

The first thing we want to do is *source* the document to see what I can find about the author’s perspective. I see that this was written in 1793, over 50 years after the Great Awakening, so I’m not sure how reliable this is. Maybe Franklin’s memory of hearing Whitefield differs from what actually happened. I know that memory is often inaccurate. It’s hard to predict what Franklin will say about Whitefield: on the one hand, they’re

friends, so he probably won't say bad things. On the other hand, I know that Ben Franklin really believed in Enlightenment ideas and reason, so I don't think he would have bought into the whole revival aspect of the Great Awakening. I don't really know what to predict at this point.

In this example, the teacher questioned the reliability of the document, given that it was written fifty years after the event, and surmised that Franklin may not have completely subscribed to Whitefield's religious views. The teacher also modeled doubt and uncertainty about drawing any concrete conclusions and maintained this critical stance while continuing to read the body of the document. The teacher reasoned that despite the document's inevitable embellishments and inaccuracies, certain characteristics of Whitefield's allure emerge from the account. Returning to the central historical question, the teacher concluded: "Based on this document, I would say that George Whitefield was popular because he was a really exciting speaker who could get huge crowds to listen to him".

From their desks, students observed how to evaluate a document's reliability and how to glean important information about the historical context while remaining circumspect about the author's claims. **To be sure, these skills do not constitute the entirety of disciplinary historical thinking. Historical reading is a fundamentally intertextual process that requires the reader to imaginatively reconstruct the past from the documentary traces that remain (Carr, 1967, Collingwood, 1946). Nevertheless, by demonstrating for students how to interpret Franklin's account in light of a particular historical question, the teacher takes an important step in shifting students' epistemological relationship to historical knowledge.**

The remaining documents in the lesson gave students the opportunity to practise the

strategies they just saw modeled. Students worked in small groups to fill in a graphic organizer that prompted them to source each document, identify its main ideas, and formulate a hypothesis in response to the central historical question (see figure 4). The small group arrangement allowed students to tap the support of their peers as they strove to comprehend and interpret each document. As students worked, the teacher circulated to offer assistance and monitor student comprehension. Despite the appearance of traditional seatwork, this activity structure in fact comprised an essential component of the explicit strategy instruction model. Without the opportunity to practise and receive teacher feedback, students are unlikely to internalize new ways of thinking.

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Insert figure 4 about here  
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### *Discussion*

In the final segment of the lesson, the teacher brought student attention back to the central historical question and led a whole-class discussion about the reasons for Whitefield's popularity. In particular, the teacher prompted students to consider whether they believed Franklin's claim that Whitefield was "benevolent" or the minister's assertion that he was "dangerous". Students were required to support their claims with textual evidence, and to consider the historical context of the 1740s in evaluating each author's claims. Finally, as they compared the 1740s to the present, students considered the role of religion in contemporary society, including the legacy of colonial evangelism. In the course of a single class period, students moved far beyond the dry textbook prose to envision a world where itinerant preachers

moved throngs of thousands to beg for salvation and where the keepers of tradition feared the dissolution of society.

This lesson flowed across five distinct activity segments---video, Powerpoint, teacher model, small group-work, and whole-class discussion. Yet, as opposed to traditional classrooms, where a change in activity generally indicates a significant shift in focus or concern (Stodolsky, 1998), the activities in this lesson all shared the purpose and end goal of initiating students into the practises of historical inquiry. The particular activity structures arranged student attention and behaviour in familiar and recognizable patterns: students initially focused on the teacher during the background knowledge segment and the modeling, then they turned to each other as they read the documents and answered questions. During the final whole-class discussion, students listened both to their classmates and the teacher as they reconciled the documents' conflicting claims and attempted to build an account of the past. Examined independently, most of these activities would have struck students as familiar. Together, they constituted a radical shift in students' relationship to historical knowledge.

#### Example 2: Battle of Little Bighorn

##### *Overview*

On June 25, 1876, the U.S. Seventh Cavalry, led by General Armstrong Custer, suffered a crushing defeat against the joined forces of Arapaho, Northern Cheyenne, and Lakota people, near the Little Bighorn River in what is now Crow Agency, Montana. Once glorified as "Custer's Last Stand", the battle has been endlessly scrutinized by historians, who hold competing interpretations about the numerical strength of Native Americans fighters, the movement of Custer's troops, and of the veracity of the legacy of Custer's heroic "last stand".

Each of these questions points the historian to the documentary (and, more recently, archeological) record to verify and evaluate competing truth claims. Given the nature of eyewitness testimony, and the fact that Custer and all his men were killed, we can be certain that such questions will forever remain unsettled.

The Document-Based Lesson on the Battle of Little Bighorn sidestepped the debates over the specific maneuverings of the day, and had students focus, instead, on the escalating tensions between the Lakota Sioux and the U.S. government. The lesson was designed as an Opening Up the Textbook (OUT) activity (cf. Martin, 2008, Wineburg, 2007). Rather than seek to banish the textbook, an OUT employs the ubiquitous classroom resource for the purposes of historical inquiry. The OUT activity asks students to consider how selected primary sources either expand, challenge, or corroborate the textbook's account (cf. Bain, 2005). Contemporary textbooks are notoriously evasive, preferring vague causal sequences and passive prose to active constructions with human agents (Paxton, 1999, Schleppegrell et al., 2004). Although most English teachers would wince at such writing, textbooks publishers have the unenviable task of writing history that appears to have no bias. One of the primary goals of an OUT is to train students to read textbook prose critically in order both to discern the publisher's perspective and to recognize that information has been omitted from this made-for-school narrative.

### *Background knowledge*

Thanks to Hollywood movies and popular culture, we can expect students to arrive in the classroom with some knowledge of the relationship between the U.S. government and Native Americans, even if they have never heard of General Custer (Seixas, 1993). In sharp contrast to the racist narratives that characterized cowboy-and-Indian movies of the 1950s, contemporary

movies, like *Dances with Wolves*, are likely to portray Native Americans as noble victims whose livelihoods were decimated by insatiable American greed. This historical correction, while appropriately acknowledging a past riddled with unfathomable injustice, nonetheless collapses centuries of history and renders the Native American experience fixed, monolithic, and doomed. The Document-Based Lesson sought to disturb these simplistic narratives, and to help students recognize the complexity and uncertainty of any given moment in history.

Because we assumed that students arrived in class with a fixed historical narrative about Native Americans, we deliberately chose a textbook excerpt that challenged their narrative to provide the background information for the lesson. We hoped that the contrast between students' assumptions and the textbook account would provide enough friction to ignite the historical inquiry. After providing a three-minute lecture that situated the Battle of Little Bighorn in the context of the Indian Wars in the decades following the Civil War, the teacher posed the lesson's central question: "Who was responsible for the Battle of Little Bighorn?" and asked students to read the textbook passage.

The account of the Battle of Little Bighorn typifies the textbook's effort to walk a historical tightrope (see figure 5). Causal sequences are implied but not made explicit, critical details are omitted, and no mention is made of the raging historical debates that have disputed every claim about the battle, including its very name.

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Insert figure 5 about here  
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In pairs, students answered the following four questions: 1) According to the textbook, what caused the conflict between the Lakota Sioux and the U.S. government? 2) Who started the Battle of Little Bighorn? 3) Why did Custer lose? 4) Do you think this account is an accurate description of the Battle of Little Bighorn? Why or Why not? These questions highlighted the passage's elusive prose. According to the passage, the Lakota Sioux were responsible for the conflict with the U.S. government, but students quickly note that the textbook story could have begun earlier, before the Lakota Sioux were forced to live on reservations. In the guise of a traditional textbook exercise, students were brought face to face with the central dilemma of narrative construction: where to begin the story?

### *Historical inquiry*

Students read two primary sources that shed light on the circumstances leading up to the Battle of Little Bighorn. The first document was a military report, submitted to President Grant by J.D. Cameron, the Secretary of War, on July 8, 1876, less than two weeks after the incident. The report claimed that military action was not directed at the Sioux, in general, but at certain hostile elements who “rove at pleasure, attacking scattered settlements. . . stealing horses and cattle, and murdering peaceful inhabitants and travelers”. The original document proceeded over the course of nearly four single-spaced pages to explain that Indians were in violation of the 1868 treaty that delineated reservation lands, and that the military, therefore, decided to send troops to “whip them into subjection”. The Secretary alluded to an intriguing piece of historical context when he insisted that the “accidental discovery of gold on the western border of the Sioux reservation, and the intrusion of our people thereon, have not caused this war”. In the 160-word modified version of the document (see figure 6), we omitted Cameron's account of the



military's deliberation (which we deemed less relevant to the central historical question), but maintained the reference to the discovery of gold and to Cameron's insistence that military operations were "in the interest of the peaceful people of the Sioux Nation".

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Insert figure 6 about here

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The second document students read was a 1922 interview by Dr. Thomas Marquis, a historian, who asks Kate Bighead, a Cheyenne Indian, to recount the events at Little Bighorn (Bighead, 1922/1992). Bighead explained that she first encountered Custer ("Long Hair") and the Seventh Cavalry in 1868, when her camp was attacked and burned and her people were moved to a reservation. She explained that "when gold was discovered white people came and the Indians were moved again". She and her brothers left the reservation and eventually joined groups of Sioux led by Chief Crazy Horse and later, Sitting Bull. According to Bighead, "six tribes lived peacefully for several months" until their peace was disrupted by soldiers in the summer of 1876.

Without adequate scaffolding, most students would flounder in their efforts to tie these documents to the central question. Arranged in small groups, students answered guiding questions that targeted discrete historical reading strategies and helped students interpret each document (see figure 7).

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Insert figure 7 about here

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For example, *sourcing* questions asked students to identify who wrote each document, when, and what purpose it served. A *contextualization* question asked students to consider why Cameron would have mentioned the discovery of gold. *Corroboration* questions asked students to compare the accounts in each of the primary sources and the textbook. The questions highlighted the numerous ways the documents complicated the textbook account. The military report corroborated the textbook's assertion that the Sioux conducted raids against white settlers, but Kate Bighead insisted the tribes were living "peacefully". On the other hand, Cameron's allusion to the discovery of gold and white encroachment on native lands raised new questions about the motivation behind the military actions. While engaged in seemingly typical seatwork, students practised the strategies of disciplinary reading and confronted deep epistemological questions about the nature of historical knowledge.

### *Discussion*

The teacher helped students sort through the documents' competing claims in the whole-class discussion at the end of the lesson. Should they trust Cameron, who as Secretary of War, would have been held responsible for the massacre of U.S. soldiers? On the other hand, could they trust Kate Bighead's account, considering the interview was conducted 46 years after the Battle of Little Bighorn? How old was she in 1876? If she were a child, perhaps she was not aware of the raids on white settlements. Moreover, we know nothing of Dr. Thomas Marquis and how Bighead's perceptions of him might have influenced her story.

By the end of the lesson, students may have been no closer to answering the central question of "Who was responsible for the Battle of Little Bighorn"? but they had learned quite a bit of history. The documents complicated the textbook account, shattered simple narratives of

Westward expansion, and painted the period as a complex and dynamic time. The U.S. government emerged as aggressive and committed to white expansion, but its military action had to be publicly justified: Cameron implied that the pursuit of gold would *not* have been a valid justification for military action, nor would the indiscriminate persecution of the Sioux. Though historians have demonstrated that both reasons did, ultimately, motivate military action against Native Americans, the Cameron document indicated that in 1876 the political climate was such that it would have been inappropriate to admit as much outright. The Sioux, meanwhile, emerged as defiant and resistant in the 1870s, refusing to sequester themselves on reservations. Defeat and subjugation were not a foregone conclusion, neither for the Lakota Sioux, nor for the U.S. government.

The Battle of Little Bighorn lesson included a summative activity that teachers assigned for homework: students were to re-write the textbook passage incorporating evidence from both primary sources. The activity brought students full circle, back to the original textbook account, but this time as creators of historical knowledge. As students inevitably struggled to incorporate their newfound knowledge into the limited space and flat prose of the textbook passage, they gleaned the lesson's core message: history is not a simple story.

#### Discussion

The Document-Based lesson attempted to reform history instruction by offering teachers a flexible activity structure that fit the 50-minute period of a large comprehensive public high school. Rather than uproot the conventional norms and structures that define classroom life, we preserved the traditional role of the teacher and the signature activities that stand as landmarks of social studies instruction. The classroom textbook, lecture, recitation, seatwork, and teacher-led

whole-class discussion all found their way into the Document-Based Lesson. Using this familiar foundation, we constructed a predictable, repeatable *Activity Sequence* that inverted students' relationship to historical knowledge. Whereas in traditional history classrooms, students are expected to accept and memorize an established historical narrative from a single text (typically, the classroom textbook), in Reading Like a Historian lessons, students were expected to interrogate, and then reconcile, the historical accounts in multiple texts in order to arrive at their own interpretations.

### *Limitations*

Like earlier efforts (cf. Brown, 1996), however, our attempt to bring inquiry into the history classroom ran up against real limitations in teacher knowledge. This weak link became especially evident in the final discussion portion of the Activity Sequence, which relied heavily on teachers' grasp not only of chronology and historiography, but also on the teacher's capacity to steer students away from presentist judgments and towards an awareness of their own subjectivity as historical actors and readers. In the course of our six-month intervention in five classrooms, only a handful of discussions included student comments that reflected this degree of historical consciousness (Reisman, 2011a). The finding was particularly surprising considering that the lessons' documents were intentionally selected to highlight the disjuncture between past and present and to disturb students' simple narratives about the past.

This limitation raises important questions about the training required to prepare teachers to implement the materials in the Reading Like a Historian curriculum. Achieving a deep grasp of subject matter knowledge takes more than the four days we devoted to teacher training prior to our intervention and the extensive bank of curriculum materials we provided. State subject-

matter requirements for teacher certification exacerbate the problem, as few states mandate coursework in history, let alone an undergraduate degree (Ravitch, 2000). At the same time, we hold no illusions about “teacher-proof” materials. Teachers will always be instructional gatekeepers, and their comprehension of both the methods and the larger purpose of any approach directly affects the fidelity of its implementation. As Reading Like a Historian materials continue to make their way into classrooms<sup>1</sup> and open the door to historical inquiry, we must consider how best to prepare teachers to recognize and surface the deep epistemological questions that underlie each lesson.

A second limitation lies in the absence of usable assessments that measure disciplinary historical thinking. As long as state assessments continue to measure recall and identification of discrete facts, teachers will continue to privilege memorization over the processes of inquiry and textual interpretation. It is incumbent upon those of us engaged in teaching and learning of history to see the problem of valid assessment as tantamount to that of curriculum and instruction.

### *Implications*

Social studies instruction will always be saddled with multiple goals and susceptible to crippling dichotomies. Civic participation, global citizenship, social justice, historical literacy, multicultural education, and disciplinary inquiry all vie for attention in the social studies classroom. Inevitably, these turf wars resurrect familiar dichotomies that put reform efforts into warring camps. The Reading Like a Historian curriculum attempted to resolve the classic dilemmas between breadth and depth, and between factual knowledge and exploratory inquiry.

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<sup>1</sup> At the time of this writing, our curriculum website displays over 90,000 downloads of curricular materials.

In the Document-Based Lesson, factual historical knowledge *enabled* disciplinary historical inquiry.

Furthermore, the Document-Based Lesson directly addressed the challenges of adolescent literacy. Teachers with classrooms of students reading far below grade level can choose a range of activities from today's curriculum supermarket that deemphasize reading and writing. Yet, to avoid the problem of literacy is to shirk responsibility. The difference between basic comprehension and high-level analysis is the difference between disenfranchisement and opportunity. Research shows that reading can no longer be relegated to the Language Arts classroom if students are to be prepared to tackle the complex texts they will encounter in college (National Institute for Literacy, 2007). The Document-Based Lesson, with its modified documents and emphasis on explicit disciplinary strategy instruction, offered teachers a way to improve students' literacy while developing their content knowledge.

The Document-Based Lesson also raised important questions about the role of repetition and habituation in classroom instruction. Much of the rhetoric we hear today about varying and differentiating instructional formats stands in contrast to the predictability and repetition of the Activity Sequence of the Document-Based Lesson. Yet, it is precisely these qualities that contributed to students' development of disciplinary habits. Thus, teachers would often ask students before they started to read a document, "What's the first thing we do when we read a document"? to which students would respond in unison, "Source"!<sup>2</sup> Such synchronized chanting does not sit well in many education circles. Again, in the crude dichotomies that characterize educational discourse, one must labor to find space between constructivists, who

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<sup>2</sup> See "Reading Like a Historian" video: <http://www.youtube.com/watch?v=wWz08mVUIt8>

believe students set their own pace for learning and meaning-making, and behaviourists, who view repetitive drill as an effective means of mastering foundational knowledge. By providing students repeated opportunities to practise the strategies of historical reading, the Document-Based Lesson helped them develop the very cognitive tools that would allow them to make meaning in the process of inquiry.

Finally, our approach also pushed back on the widely-held assumption that classroom instruction is impervious to change (Cuban, 1993, Elmore, 1996). Indeed, reform efforts that produce instructional change have been found to share a set of characteristics: extensive materials to support teacher change, clear and specific methods for instruction practise, and local facilitators whose job it is to coach teachers and ensure curricular fidelity (cf. Correnti and Rowan, 2007, Rowan and Miller, 2007). The Reading Like a Historian approach shared many of the same characteristics. Our lesson plans included specific, detailed guidelines for implementation. Our predictable Activity Sequence constituted a structured method that teachers could easily incorporate into daily instruction. Our extensive materials ensured that adherence to the approach would not disrupt the chronological flow of high school history courses. Moreover, the regular presence and accessibility of a researcher who designed the materials ensured a degree of fidelity that might not have occurred otherwise. All of these variables closed the distance between the abstract principles of “inquiry” and “discovery”, and the reality of classroom instruction.

Our approach was meliorative, not revolutionary. We attempted to design materials that would allow teachers to engage students in disciplinary inquiry without disrupting the deep structures that define and perpetuate the grammar of schooling. Given the history of failed

reforms, we set our sights on making incremental changes in how students perceived learning in history. In this goal, we believe we succeeded. As one 11<sup>th</sup> grader explained in an exit interview: “Last year, we would have book work and I would just go through the book, go to the questions, look back into the book, get the answers, and I’d be done in maybe ten minutes. . . . This year it’s like we’re forced to actually think, we’re forced to actually read and really just contextualize everything. It just makes your mind work much more than it did in the past”.



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## Appendix

The study represented the first large-scale extended curriculum intervention in disciplinary reading in an urban district. Participants were 236 eleventh graders from five public high schools in San Francisco Unified School District, enrolled in US History. Each school contributed one treatment and one control classroom. The study measured the effects of a six-month documents-based history curriculum on 1) students' historical thinking; 2) students' ability to transfer their historical thinking strategies to contemporary problems; 3) students' retention of factual knowledge about history; and 4) growth in students' general reading comprehension skills.

The study was a 2X5 quasi-experiment with a set or vector of outcome variables. The effects of treatment condition and schools were examined with multivariate analysis of covariance (MANCOVA). We conducted a principal component analysis on three pre-test measures which were highly correlated. A single component with eigenvalues greater than 1 was extracted and we used this composite measure as the covariate, with the four outcome measures as a vector: Historical Thinking Post-Test; Transfer of Historical Thinking Test; Factual Knowledge Test; and Gates-MacGinitie Reading Post-Test.

MANCOVA analysis showed a significant overall effect on all outcome measures for both independent variables: treatment,  $F(4,168) = 6.889, p < .001$ , and school,  $F(16, 684) = 4.565, p < .001$ . Follow up univariate ANCOVA analysis found a significant effect for school on three of the outcome measures: Historical Thinking,  $F(4,171) = 3.997, p = .004$ , Factual Knowledge,  $F(4,171) = 13.15, p < .001$ , and Reading Comprehension,  $F(4,171) = 2.65, p = .035$ . The effect of school on Transfer of Historical Thinking tended toward significance,

$F(4,171) = 2.299, p = .061$ . These findings suggest that school context predicts student achievement, regardless of treatment condition. However, treatment condition was found to have a main effect on all four of the outcome measures: Historical Thinking,  $F(1,171) = 17.37, p < .001$ , Transfer of Historical Thinking,  $F(1,171) = 14.95, p < .001$ , Factual Knowledge,  $F(1,171) = 5.65, p = .019$ , and Reading Comprehension,  $F(1,171) = 8.70, p = .004$ . There was no school by treatment interaction effect,  $F(16, 684) = 1.226, p = .242$ .

Figure 1: Examples of Variations of “Activity Segments” in Activity Sequence of the Document-Based Lesson (50-minute class period)

	Approx. duration (minutes)	Example 1: Great Awakening Lesson	Example 2: John Brown Lesson	Example 3: Battle of Little Bighorn Lesson
Background Knowledge	10	<ul style="list-style-type: none"> <li>● Video clip</li> <li>● Powerpoint lecture</li> </ul>	<ul style="list-style-type: none"> <li>● Powerpoint lecture</li> <li>● Timeline</li> </ul>	<ul style="list-style-type: none"> <li>● Lecture</li> <li>● Textbook</li> </ul>
Historical Inquiry	30	<ul style="list-style-type: none"> <li>● Teacher modeling</li> <li>● Small groups fill graphic organizer</li> </ul>	<ul style="list-style-type: none"> <li>● Individual seatwork on guiding questions</li> </ul>	<ul style="list-style-type: none"> <li>● Small group-work with guiding questions</li> </ul>
Discussion	10	<ul style="list-style-type: none"> <li>● Whole-class</li> </ul>	<ul style="list-style-type: none"> <li>● Whole-class</li> </ul>	<ul style="list-style-type: none"> <li>● Whole-class</li> </ul>

Figure 2: Outline of a sample “Document-Based Lesson”

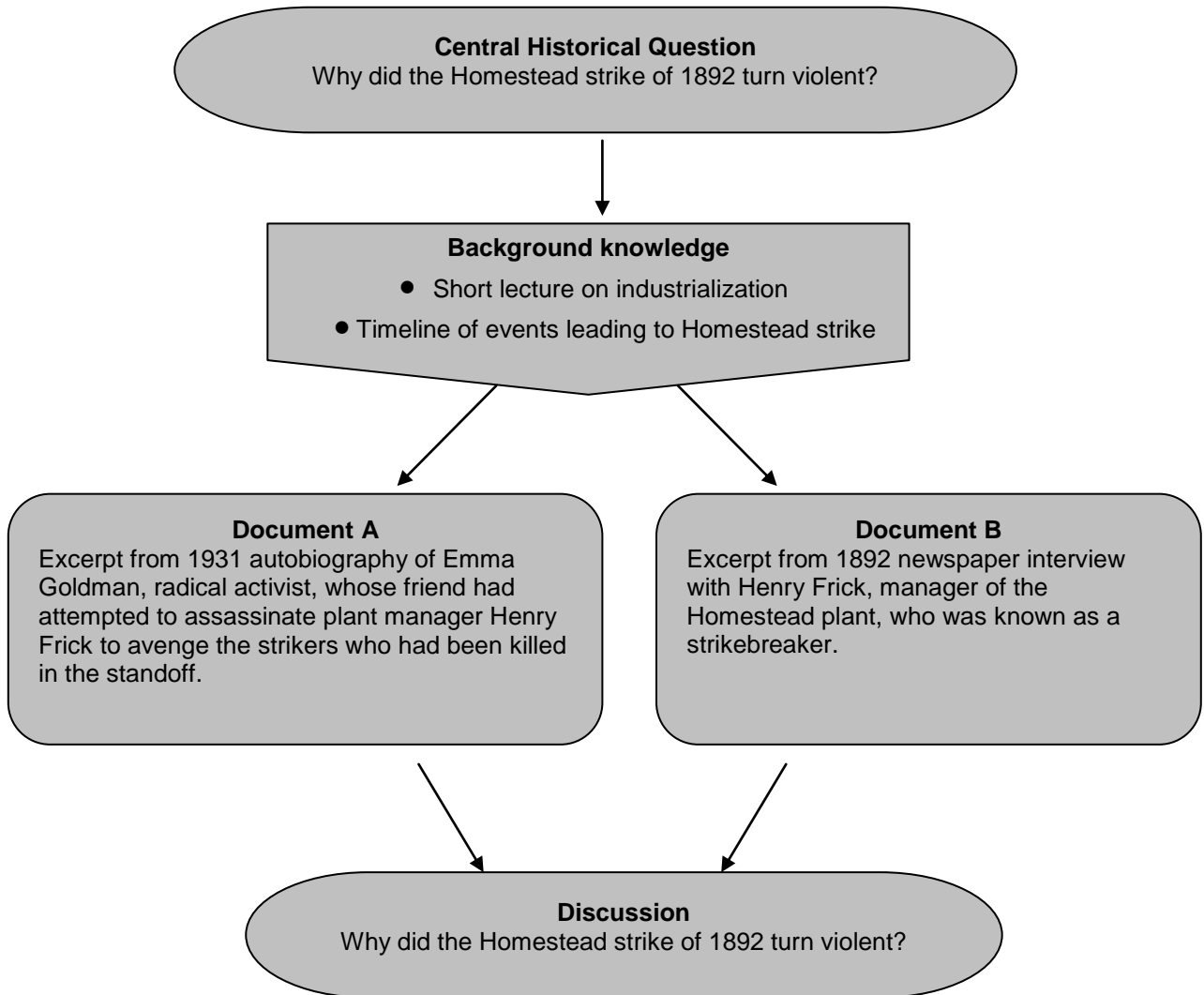


Figure 3: Excerpt of modified document in Great Awakening Lesson

Original	Modified
<p>. . . I happened soon after to attend one of his sermons, in the course of which I perceived he intended to finish with a collection, and I silently resolved he should get nothing from me, I had in my pocket a handful of copper money, three or four silver dollars, and five pistoles in gold. As he proceeded I began to soften, and concluded to give the coppers. Another stroke of his oratory made me asham'd of that, and determin'd me to give the silver; and he finish'd so admirably, that I empty'd my pocket wholly into the collector's dish, gold and all . . .</p> <p>He had a loud and clear voice, and articulated his words and sentences so perfectly, that he might be heard and understood at a great distance, especially as his auditories, however numerous, observ'd the most exact silence. He preach'd one evening from the top of the Court-house steps, which are in the middle of Market-street, and on the west side of Second-street, which crosses it at right angles. Both streets were fill'd with his hearers to a considerable distance. Being among the hindmost in Market-street, I had the curiosity to learn how far he could be heard, by retiring backwards down the street towards the river; and I found his voice distinct till I came near Front-street, when some noise in that street obscur'd it. Imagining then a semi-circle, of which my distance should be the radius, and that it were fill'd with auditors, to each of whom I allow'd two square feet, I computed that he might well be heard by more than thirty thousand. This reconcil'd me to the newspaper accounts of his having preach'd to twenty-five thousand people in the fields, and to the antient histories of generals haranguing whole armies, of which I had sometimes doubted.</p>	<p>I happened to attend one of his sermons, in the course of which I realized he intended to finish with a collection, and I silently decided he should get nothing from me. [Franklin thought the Orphan House should be built in Philadelphia]. I had in my pocket a handful of copper money, three or four silver dollars, and five pieces in gold. As he proceeded I began to soften, and concluded to give the coppers. Another stroke of his oratory made me ashamed of that, and I decided to give the silver; and he finished so admirably, that I emptied my pocket wholly into the collector's dish, gold and all.</p> <p>He had a loud and clear voice, and articulated his words and sentences so perfectly, that he might be heard and understood at a great distance, especially as his audiences, however numerous, were completely silent. He preached one evening and I computed that he might well be heard by more than thirty thousand.</p> <p><i>Source: The Autobiography of Benjamin Franklin, 1793. Ben Franklin was a good friend of George Whitefield, though he did not agree with his religious beliefs.</i></p>



Figure 4: Graphic Organizer for First Great Awakening Lesson

<p><b>Document A</b></p> <p>Ben Franklin</p>	<p><b>Source:</b> author, type of document, date</p>	<p><b>Summarize:</b> main idea</p>
<p><b>Hypothesis 1:</b> According to Document A, why was George Whitefield so popular?</p>		
<p><b>Document B</b></p> <p>Nathan Cole</p>	<p><b>Source:</b> author, type of document, date</p>	<p><b>Summarize:</b> main idea</p>
<p><b>Hypothesis 2:</b> According to Document B, why was George Whitefield so popular?</p>		
<p><b>Document C</b></p> <p>Nathanael Henchman</p>	<p><b>Source:</b> author, type of document, date</p>	<p><b>Summarize:</b> main idea</p>
<p><b>Hypothesis 3:</b> According to Document C, why was George Whitefield so popular?</p>		

Figure 5: Textbook excerpt for Battle of Little Bighorn Document-Based Lesson

**Battle of Little Bighorn**

For years the Lakota Sioux conducted raids against white settlers who had moved into Sioux lands. In response, the U.S. government ordered all Lakota Sioux to return to their reservation by January 31, 1876. They refused. The situation was turned over to the military.

About 2,000 Sioux, Cheyenne, and Arapaho gathered near the Little Bighorn River. The leader of the Sioux, **Sitting Bull**, conducted a ceremonial sun dance. He reportedly had a vision of a great victory over soldiers.

The brash leader of the U.S. Army troops, Lieutenant Colonel **George Armstrong Custer**, predicted victory as well. On June 25, 1876, Custer led his troops into a headlong attack against superior numbers. Custer and his troops were quickly encircled and slaughtered. The **Battle of Little Bighorn** was a tremendous victory for the Sioux—but a temporary one. Now the U.S. government was even more determined to put down the Indian threat to settlers.

*Source: American Anthem, Holt, Rinehart, and Winston, 2006, p. 441.*

Figure 6: Secretary of War, J.D. Cameron, letter regarding events leading up to Battle of Little Bighorn

Original	Modified
<p>The Sioux or Dakota Nation of Indians, embracing various tribes, as the Yanktons, Yanconnais, Brules, Ogallalas, Minneconjous, Sans Arcs, Two Kettles, &amp;c., have long been know as the most brave and warlike savages of this continent. They have for centuries been pushed westward by the advancing tide of civilization, till in 1868 an arrangement or treaty was made with them by a special commission named by Congress, whereby for certain payments and stipulations they agreed to surrender their claim to all that vast region which lies west of the Missouri River and north of the Platte, to live at peace with their neighbors, and to restrict themselves to a territory bounded east by the Missouri River, south by Nebraska, west by the 104th meridian, and north by the forty-sixth parallel, a territory as large as the State of Missouri. The terms of this treaty have been liberally performed on the part of the United States, and have also been complied with by the great mass of Sioux Indians. Some of these Indians, however, have never recognized the binding force of this treaty, but have always treated it contempt, have continued to rove at pleasure, attacking scattered settlements in Nebraska, Wyoming, Montana, and Dakota, stealing horses and cattle, and murdering peaceful inhabitants and travelers. . . .</p> <p>On the 9th of November, 1875, United States Indian Inspector E. C. Watkins made an elaborate report to the Commissioner of Indian Affairs, in which he uses this language: "I have the honor to address you in relation to the attitude of certain wild and hostile bands of Sioux Indians in Dakota and Montana that came under my observation during my recent tour through their country, and what I think should be the policy of the Government toward them. I refer to Sitting Bull's band and other bands of the Sioux Nation under chiefs or "head-men" of less note, but no less untamable and hostile. These Indians occupy the center, so to speak, and roam over Western Dakota, and Eastern Montana, including the rich valleys of the Yellowstone and Powder Rivers, and make war on the Arickarees, Mandans, Gros Ventres, Assinaboines, Blackfeet, Piegans, Crows, and other friendly tribes on the circumference. From their central position they strike to the East, North, and West, steal horses, and plunder from all the surrounding tribes, as well as frontier settlers and luckless white hunters or emigrants who are not in sufficient force to resist them." . . .</p> <p>The present military operations are not against the Sioux Nation at all, but against certain hostile parts of it which defy the Government, and are undertaken at the special request of that bureau of the Government charged with their supervision, and wholly to make the civilization of the remainder possible. No part of these operations are on or near the Sioux reservation. The accidental discovery of gold on the western border of the Sioux reservation, and the intrusion of our people thereon, have not caused this war, and have only complicated it by the uncertainty of numbers to be encountered. The young warriors love war, and frequently escape their agents to go on the hunt, or warpath, their only idea of the object of life. The object of these military expeditions was in the interest of the peaceful parts of the Sioux Nation, supposed to embrace at least nine- tenths of the whole, and not one of these peaceful or treaty Indians have been molested by the military authorities. . . .</p>	<p style="text-align: right;">Washington, July 8, 1876</p> <p>To the PRESIDENT:</p> <p>There have been certain wild and hostile bands of Sioux Indians in Dakota and Montana. I refer to Sitting Bull's band and other bands of the Sioux Nation. These Indians continue to rove at pleasure, attacking scattered settlements, stealing horses and cattle, and murdering peaceful settlers and travelers.</p> <p>The present military operations are not against the Sioux Nation at all, but against certain hostile parts of it that defy the Government. No part of these operations are on or near the Sioux reservation. The accidental discovery of gold on the western border of the Sioux reservation, and the settlement of our people there, have not caused this war. The young Indian warriors love war, and frequently leave the reservation to go on the hunt, or warpath. The object of these military operations was in the interest of the peaceful people of the Sioux Nation, and not one of these peaceful Indians have been bothered by the military authorities.</p> <p>Very respectfully, J. D. CAMERON, Secretary of War</p> <p><i>Source: The President of the United States asked the Secretary of War, J.D. Cameron, for a report of the military actions leading up to the Battle of Little Bighorn.</i></p>

Figure 7: Guiding questions for Little Bighorn lesson

<b>Battle of Little Bighorn Guiding Questions</b>	Name _____
<b>Cameron Report</b>	
1) <b>Sourcing:</b> Who wrote this report? What was his purpose? When was it written?	
2) <b>Contextualization:</b> According to this document, what was the cause of conflict between Indians of the Sioux nation and the U.S. Government?	
3) <b>Contextualization:</b> Why would Cameron write: <i>“The accidental discovery of gold on the western border of the Sioux reservation, and the settlement of our people there, have not caused this war”</i> ?	
4) <b>Close Reading:</b> How does Cameron describe the Sioux Indians who he believes are attacking white settlements?	
5) <b>Corroboration:</b> What are the similarities and differences between this report and the textbook?	
<b>Kate Bighead Interview</b>	
1) <b>Sourcing:</b> What type of document is this? When was it written? Why was it written?	
2) <b>Contextualization:</b> According to Kate Bighead, what caused the conflict between the U.S. government and Native American tribes?	
3) <b>Corroboration:</b> What are two <u>differences</u> between Bighead’s account and the Cameron report?	
4) <b>Corroboration:</b> Which of the 2 documents---the Cameron report or the Kate Bighead interview---do you think is most trustworthy? Why?	