EFFECTING STUDENT LEARNING FOR HISTORICAL UNDERSTANDING

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by
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Abstract

While there have been recent efforts to improve the overall public education system in the United States, American students continue to graduate from U.S. public high schools with limited knowledge of U.S. history (Ravitch, 1988; Evans, 2004; Ross, 2006; St. Jarre, 2008; Dillon, 2011). This qualitative case study investigated how high school students today have developed an understanding of the historical past in high school standards-based U.S. history classes in two public school districts located in the suburbs of Boston, Massachusetts.

The qualitative case study was designed to investigate the following research question, “What does learning for historical understanding looked like in public high school standards-based U.S. history classrooms?” The case study involved a thorough review of the literature on the topic of historical understanding and the gathering and analysis of data from two public high schools located in the suburbs of Boston, Massachusetts. The data gathered included one-on-one semi-structured interviews with four high school U.S. history teachers and direct and unobtrusive observations of three high school U.S. history classrooms. The entire data gathering process occurred from late April to mid-May 2013. Interview transcripts, observation notes, documentary evidence analysis notes, and researcher’s memos were carefully and thoroughly read and methodically coded according to major common themes that emerged in the initial analysis.

The major findings of the case study are (1) historical understanding is the integration of content knowledge, its relationships to larger historical contexts, and significant implications to the present-day world, (2) students were motivated to learning U.S. history when it was interesting and relevant in their lives, (3) teachers utilized various tools and resources that foster learning for historical understanding in U.S. history classrooms despite certain contextual
challenges, (4) high school students employed their higher order cognitive thinking and
analytical skills when instructional activities incorporated the core concepts of historical
understanding, and (5) local school districts’ U.S. history curriculum is the key to foster
historical understanding in the classroom.

**Keywords:** historical understanding, educational leadership theory, United States history,
curriculum development, professional development
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Chapter I: Introduction

Problem of educational practice

The general scope and nature of the high school United States (U.S.) history curriculum have presented some contextual challenges that inhibited students from learning for historical understanding. High school U.S. history teachers today are expected to cover a great deal of U.S. history content within a limited amount of time (Mehlinger, 1988; Wineburg, 2001). Consequently, in order to avoid the risk of not getting through the entire curriculum in a single school year, many high school U.S. history teachers have planned their instruction through the breadth approach because “it is the easiest way to teach; every other way requires more time, more energy, and a greater range of materials than teachers have available” (Mehlinger, 1988, p. 204). Subsequently, high school students sit in U.S. history classrooms learning passively through teacher-led lectures, taking notes, answering questions at the end of chapter readings in the textbook; students tend to learn history more by memorizing historical facts, events, places, and peoples and not enough practice higher order critical thinking and analytical skills, thus not enabling them to develop any deep understanding of historical past (Mehlinger, 1988; Wineburg, 2001; Bain, 2005; McGuire, 2007).

In his book, Lies My Teachers Told Me: Everything Your American History Textbook Got Wrong, author James Loewen (2008) pointed out that students found U.S. history “the most irrelevant of twenty-one subjects commonly taught in high school” (p. 12); even worse, African American, Native American, and Latino students especially dislike the subject most. Many students do not see history and social studies as valuable in their lives, thus affecting
their learning the subject matter (Schug, Todd & Berry, 1984). In other words, if students do not see value in learning something, they are more likely not to learn it as well as they should.

Another part of the problem that’s been occurring in many high school U.S. history classes across the country has been the amount of time teaching and re-teaching the same content material because the students could not remember what they learned in previous years (Mehlinger, 1988; Duea, 1995; St. Jarre, 2008). In the Massachusetts History and Social Science Curriculum Framework (2003), for instance, identifies the Declaration of Independence in elementary (grades 3 and 5), middle (grade 8), and high school (grades 9-12) levels. However, when high school students were asked what they remember or presently know about this important American founding document, the majority of students responded with the obvious (e.g., “We declared independence!”); although some students thought the Colonists declared independence from France. Some high school seniors were unable to explain how the Declaration of Independence was an important document to the United States or discuss the complex nature and essence of the American founding document—i.e., how the Declaration of Independence reflected the economic and political challenges that colonists faced at that time as well as the outcomes or consequences of expressing thoughts on self-government and natural rights of man. This was based from my personal observation as a high school teacher teaching U.S. Government and Law to high school seniors.

Robert J. Marzano (2003) called for a “guaranteed and viable curriculum” available for all students. In other words, curriculum must be aligned and sound. However, in many U.S. school districts, history and social studies teachers have been regarded as a “fragmented group of educators” who teach the discipline in isolation (Duea, 1995; Tanner, 1980). Howard D. Mehlinger (1988) wrote, “It is hardly surprising that social studies teachers are unable to
build their instruction confidently on what is taught in the earlier grades, nor can they provide a proper foundation in knowledge and skills for the courses that will follow theirs” (p. 196). As a result, content gaps and repetition likely exist throughout the K-12 social studies curriculum (Mehlinger, 1988). Classroom teachers must be able to know what their students have learned in previous years as well as know what their students will learn in years to come.

This problem of educational practice has motivated me to investigate the contextual challenges in the high school U.S. history curriculum that have impacted student learning for historical understanding, and to explore learning opportunities that could foster historical understanding despite these challenges. My professional experience as both a classroom U.S. history teacher and K-12 curriculum director have allowed me to observe and learn how today’s students across the grade levels have approached and responded to the history and social studies curriculum. It has also allowed me to address the contextual challenges in the U.S. history curriculum, and create learning opportunities that enable high school students to develop deep understanding of the historical past through their U.S. history classes.

**Significance of the problem**

Despite the constantly growing emphasis in science, technology and engineering and mathematics (STEM) education in public schools across the United States in recent decades, the subject of U.S. history has remained an important critical subject area for the preservation and appreciation of our national identity (McNeill, 1985; Wineburg, 2001; St. Jarre, 2008). It prepares American high school students to compete, when as adults, in maintaining strong intellectual, economic, cultural, and political forces within the ever-growing flat global society in the twenty-first century (Loewen, 2008; Branson & Quigley, 1998; VanSledright,
There have been increasingly wide criticisms in which many U.S. students continue to graduate from American high schools with limited knowledge of U.S. history and government (Evans, 2004; Ross, 2006).

While there have been great efforts by state departments of education to strengthen and enrich its U.S. history curriculum by including more women, immigrants, and people of color, student achievement in U.S. history has remained bleak (Ravitch, 1998). The scope and nature of the U.S. history curriculum, for the most part, continues to present a list of historical facts, events, places, dates, and names that students continue to learn through rote memorization and recall information through multiple choice tests; thus, exacerbating the problem in which high school students continue to have difficulty in retaining basic historical content, explaining why and how events occurred and decisions were made in the past, and developing a deep understanding of the historical past (Thornton, 1994; Duea, 1995; St. Jarre, 2008).

In 2011, the National Assessment Government Board released the 2010 National Assessment of Educational Progress (NAEP) civics report card and revealed that only 27 percent of fourth-graders, 22 percent of eighth-graders, and 24 percent of high school seniors scored proficient or higher. In response to these results at a press conference, retired U.S. Supreme Court Justice Sandra Day O’Connor (2011) remarked, “[The 2010] NAEP results confirm that we have a crisis on our hands when it comes to civics education.” One month later, the 2010 NAEP assessment in U.S. history was released; while the report indicated modest gains in the average U.S. history scores among fourth-grade and eighth-grade students tested compared to the 1994 and 2006 results, the majority of U.S. students tested fell below
the basic proficient category (see Dillon, 2011). Nearly 55 percent of U.S. high school seniors tested in 2010 performed below basic category (U.S. Department of Education, 2011).

For decades, NBC’s The Tonight Show with Jay Leno’s “Jay Walking” video segments presented a humorous look on the lack of U.S. history knowledge among typical American adults, but to many educational policymakers it is more concerning (St. Jarre, 2008; Campaign for the Civic Mission of Schools, 2011). Retired U.S. Supreme Court Justice David Souter (2009), in his speaking tour to law schools across the country, claimed that nearly two-thirds of Americans today cannot name the three branches of the national government nor can they name a single sitting Supreme Court Justice. In a 2009 news report from NBC Los Angeles, “Study: Americans Don’t Know Much About History,” Josiah Bunting, III, Chairman of Intercollegiate Studies Institute (ISI) Civics Literacy Board, commented, “There is an epidemic of economic, political, and historical ignorance in our country” (paragraph 5). The ISI study found that nearly 49 percent of typical Americans from all backgrounds failed a basic history and civics quiz consisting of 33 questions; 40 percent of those who took the quiz believed that the power to declare war belonged to the president, and that one in five elected officials thought the Electoral College was, in fact, an actual college training those who seek to serve in a higher office or that it was established to supervise the televised presidential debates.

**Research question**

The overarching research question for this qualitative case study was: “What does learning for historical understanding look like in public high school standards-based U.S. history classrooms?” The intent of the overarching research question explored the current
problem of educational practice and drove the qualitative research case study. As the review of the literature suggested, incorporating key core concepts of historical understanding through instructional activities and practice have consistently enabled students to develop a deep understanding of historical concepts, themes, and ideas (McTighe & Wiggins, 1999; Marzano, 2003; Prince, 2004; DuFour & DuFour, 2004; Smith, Sheppard, Johnson, & Johnson, 2005; Caldwell, 2007; Stoskopf & Bermudez, 2008; Gardner, Perkins, & Perrone, 2010). The problem of practice, however, has exposed a disconnect between incorporating core concepts of historical understanding in instructional practice and the constant high rate of poor student academic performance and achievement in U.S. history in our high schools (Thornton, 1994; Duea, 1995; Ravitch, 1998; Bremer & Morocco, 2003; Evans, 2004; Wineburg & Martin, 2004; Ross 2006; McGuire, 2007; St. Jarre, 2008; Schmoker, 2011b).

In support of the overarching research question, this case study explored the following sub-questions:

- How do teachers describe their experience with effective learning for historical understanding?
- How do students experience effective learning for historical understanding?
- What types of structures and strategies help support or impede opportunities for student learning for historical understanding?

**Theoretical frameworks**

This research study drew upon the lenses of two theoretical frameworks: historical understanding and educational leadership. These theoretical frameworks were used to unpack the problem of educational practice and offered insights for this qualitative case study.
research. Historical understanding theory focused on how today’s high school students today developed deep understanding of the historical past in U.S. history classroom. Educational leadership theory focused on examining the learning environment fostered learning opportunities for students to develop and reach historical understanding. These two theories allowed me to investigate how learning for historical understanding occurred in public high school U.S. history classes.

**Historical understanding theory.** The essence of the historical understanding theory is how students think, learn, and comprehend historical content knowledge and apply their knowledge to create and develop new thoughts, ideas, and solutions (Gardner, Perkins, & Perrone, 2010). The theory is about not only knowing what an individual has done; yet more importantly why the individual acted upon it and what impact or consequence did the action produce. Historical understanding is the theory in which students apply historical content knowledge and demonstrate deep understanding of larger or broad historical themes to develop and articulate new historical claims or theories or to solve real-world problems (Gardner et al., 2010; Stoskopf & Bermudez, 2008). Seixas looked at historical understanding as a way to collect past experiences and organize it in order to provide a meaningful context for the present experience.

Historical understanding theory encompasses key elements or core concepts that enable students to become active investigators of the historical past, provide credible explanations for why and how events and decisions were made in the past, and acquire deep understanding about the present, who we are, and why the world is what it is today (Seixas, 1996; Stoskopf & Bermudez, 2008). The core concepts of historical understanding include—in no particular order—significance, evidence, agency, causality, continuity and change. The core concepts of
historical understanding enables students to (1) explore and investigate historical evidences or data to either support or challenge present major historical themes and concepts, (2) apply historical concepts to evaluate decisions and actions of an individual or a group in the past while refraining from instituting present-day judgment, bias, or value, and (3) develop meaningful inquiry to discover unexplored key concepts and ideas that may or may not have been publicly disclosed for further analysis or debate (Gardner et al., 2010; Stoskopf & Bermudez, 2008).

Researchers in history education have already identified some key approaches that enable learning for historical understanding in high school U.S. history classes. Teachers must first identify what their students should learn and know and why it is important to know it. The notion is supported in other studies and articles on curriculum design (McTighe & Wiggins, 1999; DuFour & DuFour, 2004; Schmoker, 2011a). In Understanding by Design, McTighe and Wiggins described identifying desired results as the first of three general stages in the backward design process. “Because there is typically more content than can reasonably be addressed in the available instructional time, we are obliged to make choices. What should students know, understand, and be able to do? What is worthy of understanding? What “enduring” understandings are desired” (p. 39).

Another approach is to insure a “guaranteed and viable” standards-based curriculum available for all students (see Marzano, 2003). Schmoker (2011a) described curriculum as “the single largest school factor that affects learning, development, and college and career readiness” (p. 70). Richard and Rebecca DuFour (2004) recommended schools to allow time for teachers to analyze the curriculum in order to discuss what their students are expected to learn and how do they know when students have learned it. Content standards in a
“guaranteed and viable” history curriculum must have the capacity to enable students to become active and engaged independent learners (Mehlinger, 1988). Leading thinkers of the historical understanding theory consistently suggest that when students are active and engaged participants in learning history, they have a higher chance in comprehending higher-order concepts in history as well as retaining historical content knowledge as they advance to the next grade level (Marzano, 2003; Prince, 2004; DuFour & DuFour, 2004; Smith, Sheppard, Johnson, & Johnson, 2005; Caldwell, 2007; St. Jarre, 2008; Gardner et al., 2010; Ravitch, 2010; Schmoker, 2011b).

However, critics of the standards-based movement have argued a standards-based U.S. history curriculum have impeded effective teaching and learning because it focuses too much on trivial or insignificant information that fails to capture the true essence of the topics that students are expected to learn and know and that content standards should be reduced significantly in scope (Schmoker, 2011b); “It stands to reason that if we have fewer standards but teach them in adequate depth, students will learn more, retain more, and learn to think. And test scores will take care of themselves” (pp. 43-44). He further contended that by having only a small set of essential standards, teachers could address important historical topics in depth, which could optimize student learning for historical understanding.

**Educational leadership theory.** The primary reason to include educational leadership theory in this case study was to improve student learning in high school U.S. history classrooms (Murphy, 2002). The thinking was that once school districts have clearly identified and determined what their students must learn and know, the next priority would allow the districts to determine how to create and deliver meaningful instructional activities and practices that enable students to learn and retain content knowledge and acquire full
understanding of what has been learned (Schmoker, 2011b). Recent research has suggested that educational leadership that is distributed among administrators and teachers is likely to have a greater impact on student achievement and outcomes than the traditional, top-down leadership style (Spillane, Halverson, & Diamond, 2004). The educational leadership theory, therefore, can be applied to this case study by identifying the contextual conditions and exploring plausible avenues in which school leaders and classroom teachers can take to cultivate meaningful and effective learning opportunities for enhanced learning for understanding.

Several articles in contemporary education journals have indicated that while learning for historical understanding has been acknowledged as an important contributing factor to improve student learning and achievement in U.S. history, the majority of U.S. history classrooms have continued to underutilize learning practices, tools, and resources that foster core concepts of learning for historical understanding regularly in the classroom (Bremer & Morocco, 2003; Wineburg & Martin, 2004; McGuire, 2007; Schmoker, 2011b). This case study investigated some of the prevailing certain contextual challenges, such as instructional time to address the U.S. history content standards at the national, state, and district curriculum, demands in implementing district-wide and/or school-wide goals and expectations, emphasis on standards-based assessments, and acquiring high quality curriculum resource materials including textbooks—all which can impact and determine the overall effectiveness of student learning for historical understanding.

Another application of the educational leadership theory was to increase opportunities to enhance teacher efficacy through meaningful content and pedagogical workshops to increase a teacher’s knowledge in specific content areas and by establishing professional
learning communities to allow teachers become fully invested in student learning and achievement (Fullan, 2007; DuFour et al., 2004). U.S. history teachers have been expected to stay current with content knowledge and maintaining a solid understanding of pedagogical trends and contemporary thoughts in teaching U.S. history and government (Ravitch, 1998). According to a 1997 report titled “America’s Teachers: Profile of a Profession, 1993-94” by the National Center for Education Statistic, approximately 17 percent of the history teachers across the United States had neither a major or minor in the core academic subject they were teaching (Ravitch, 1998). Ravitch observed that more than three-quarters of the social studies teachers have neither majored nor minored in U.S. history; “Fifty-nine percent of students in middle school and 43 percent of students in high school study history with a teacher who did not earn at least a history minor in college” (p. 497).

School districts must concentrate on the existing goals and objectives within the school district that works rather than constantly seeking and implementing a new initiative after another (Schmoker, 2011b). Constant introduction of new trends and initiatives, and often times lacking adequate follow-through, only results to the endless disruption of the teacher’s efforts in improving and enhancing already-established practices of good instruction. If teachers simply continue focusing on what they currently teach and at the same time expanding and enhancing their teaching repertoire, they will become more effective in enhancing student learning for understanding.
Chapter II: Literature Review

Historical understanding is defined as “the ability to reflect, synthesize, and construct understandings of history based on evidence” (Salinas, Bellow, & Liaw, 2011, p. 186). Historical understanding is not a new concept; in fact, many researchers in history education and historians believed that the central aim in learning for historical understanding is to allow students to explore new thoughts and to develop varied explanations for why and how events and decisions occurred in the past (Stoskopf & Bermudez, 2008). Historical understanding involves more than simply recalling and explaining a historical event, person, or topic. It includes careful research and thoughtful analyses to create new thoughts and ideas, or solutions to a problem (Perkins, 1994). Historical understanding engages the individual learner to investigate and analyze historical data and other evidences and apply them to develop new theories, explanations, and interpretations for why and how decisions and events have occurred in the past (Perkins, 1994; Wineburg, 2001; Bremer & Morocco, 2003; Stoskopf & Bermudez, 2008; Salinas et al., 2011). Before the individual learner can search for clues and answers, the learner must first learn to inquire and asks pertinent questions (Lee & Ashby, 2000).

Historical understanding is not entirely a pedagogical process; rather it is a measurement of how the individual learner applies his or her level of historical content knowledge to challenge or corroborate existing, perhaps even popular, interpretations or sources of the past (Seixas, 1996). Seixas identified three essential elements of historical thinking and understanding: realizing the significance of past events, knowing how people know about the past (evidence), and making sense of past decisions made through the ideas of agency, empathy, and moral judgment. The learner must also articulate the historical
significance or impact of a past event or decision on contemporary complex beliefs of human existence in the world today (Perkins, 1994; Seixas, 1996; Wineburg, 2001; Bremer & Morocco, 2003).

To think and understand like a historian means going beyond examining artifacts or evidences of the past and interpret its significance or meaning of why and how past events have occurred (Blythe & Perkins, 1988). In historical terms, to understand is to make sense of a past event, action, or decision, and to apply its historical significance to help explain contemporary social, political or economic issues, and to help resolve present conflicts or avoid future ones (Blythe & Perkins, 1988; Gardner, 2011).

**Development of historical understanding**

The development of the historical understanding theory can be traced back from the collective works of Robin G. Collingwood (1946), particularly from his posthumously published work, *The Idea of History*, in which he asserted that historians should re-enact the past in their minds. “When a man thinks historically,” he writes, “he has before him certain documents or relics of the past. His business is to discover what the past was which has left these relics behind…. To discover what this thought was, the historian must think it again for himself” (p. 282). Collingwood explained that no one experience can ever be identical with the first, and that the historian re-enacting it is but a version of the original, and even if the experience was identical, the present-day historian is unavoidably imprisoned in his or her own present beliefs, values and judgment, and will never able to identically assume the experiences and thoughts of those who lived in the past. He contended that in knowing and understanding history is to realize that the stories of the past are reflections of those who
wrote them. “Such phrases [e.g., “dark ages”] tell us nothing about those ages themselves, though they tell us a great deal about the persons who use them, namely that they are unable to re-think the thoughts which were fundamental to their life” (Collingwood, 1946, pp. 218-219).

Historical understanding consists of core elements or concepts in which learners, or students, become investigators of the past, enhancing learners’ interest and deep understanding of history (Stoskopf & Bermudez, 2008). In no particular order, the core concepts of historical understanding include, but not limited to (1) evidence, (2) causality, (3) agency, (4) significance, and (5) continuity and change. The core concepts are essential to teaching and learning for historical thinking and understanding because it not only bridges the past to the present but also provides a framework for organizing information into a manageable curriculum in U.S. history classrooms across the nation. History has been realized as the only subject area in the school curriculum where students can learn about being part of the human experience (Wineburg, 2001). In a broader and global context, historical thinking and understanding creates an informed citizenry in a democratic society and knows much about “the world beyond its own borders” (McGuire, 2007).

One of the greatest challenges in teaching and studying history is there is so much of it and it is impossible to study everything (Seixas, 1994). Another challenge is that historical significance is neither fixed nor linked to any series of events; determining what is historically significant reflects current interests and beliefs as well as ongoing mysteries and problems about the past that contemporary historians want to know more about at the present time (Seixas, 1997; Von Heyking, 2004; Harcourt, Fountain, & Sheehan, 2011). In other words, an historical event that was deemed significant twenty years ago may not be
considered significant today, and what may be considered significant today may not be significant twenty years from now. What is possible, however, is for the individual learner to assess and determine larger contexts of the historical past that are significant to the present-day and, therefore, “worthy of historical study” (p. 281).

Rather than accepting what is historically significant as prescribed by expert historians, history textbook authors, national and/or state history curriculum standards, teachers, it is perhaps more essential for the learner to discover his or her own criteria for what is considered historically significant and for the teacher know how to foster the learner’s thinking (Seixas, 1994). Therefore, it is important for the student to identify and determine the criteria in which an event or phenomena is historically significant. The learner must be able to distinguish between trivial minutia and what is important (Von Heyking, 2004). The concept of historical significance allows students to understand how the study of history operates and develop the skill and capacity to think historically (Harcourt, Fountain, & Sheehan, 2011).

Core concepts of historical understanding

Historical narrative is the recounting of past human events (see National Center for History in the Schools, 2011). It is also the process in which the learner is able to make sense of past events and happenings by organizing them into frames of meaning (Polkinghorne, 2005). An historical narrative presents a collection of past events and happenings to create a broader historical concept or topic for study. Narrative approaches are more readily accessible and can be used as the initial step toward more complex analytical understandings in history (Hawkey, 2007). Not so long ago the narrative approach had been viewed by the academic
community as a low-level skill and is typically associated with low-performing students; however, recent research findings have found that incorporating historical knowledge into structured narratives can increase learning opportunities for the learner to perform high-level skills and thinking abilities (Hawkey, 2007; Barton, 2008; Seixas, 1994), and that “the construction of historical narrative from historical source material…is a high-order skill which lies at the heart of the historian’s craft” (Historical Association, in Hawkey, 2007). Downey (1995), in his research, suggested that narrative writing is better suited to encourage historical empathy than assuming the historical figure writing a letter or addressing to a crowd. Lerner (1987) asserted that teachers must tell a story and tell it well; a storytelling approach to history “can transmit that facet of historical studies and do justice to the richness of what history has to offer as an intellectual discipline” (p. 5).

Chronology is essential to the study of history because it engages the individual learner to place and sequence events, periods or eras, and people. History is closely linked with the concepts of time and chronology (Downey & Levstik, 1991). The learner is able to grasp the concepts of scale and duration, change, cause-and-effect relationships, and making connections and drawing comparisons across periods (Dawson, 2004), and is able to recognize patterns and sequences through real events (Downey & Levstik, 1991). Chronological understanding contributes to the learner’s sense of identity and also provides proper context to historical contents that may help explain the origins and developments of contemporary global issues and perhaps resolve long-standing conflicts or problems of today (Shemilt, 2004; Simsek, 2009).

Past research findings have concluded that children under the age of 16 are not mature enough to comprehend historical time concepts (Hallam, 1970; Von Heyking, 2004; Simsek,
Denis Schemilt (2004) acknowledged that children “often forget the sequence of events while, as a rule, remembering something or other about the events themselves. They also make sense of what is portrayed in timelines in ways that fail to connect with what is known about the contemporary world” (p. 94). Several past research studies have asserted that learning history and social studies were beyond the comprehension of young children under the age of fourteen (Hallam, 1970). However, more recent findings have determined that the young student can, in fact, retain historical knowledge using prior mental structures of history (Levstik, 1993).

Further research later concluded that improper teaching—not maturity—has been a major influential factor to a young learner’s inability in comprehending concepts of chronology and the use of dates (Downey & Levstik, 1991; Dawson, 2004; Barton, 2008; Hodkinson, 2011). Through his research, Ian Dawson (2004) found that teaching and curriculum planning are significant toward the development of chronological understanding than “simple maturation or the level of abstraction of an idea” (p. 15). Children can, at a very young age, begin to accumulate historical knowledge such as realizing how life was different in the past compared to the current (Barton, 2008). A 1987 research study found that by ages 8 and 9 children are able to determine how long ago a past event took place and associate people and events with dates (Downey & Levstik, 1991).

Dawson (2004) contended that the best approach is to deliver or present historical content into “a series of coherent stories rather than treating it as a series of episodic highlights” (p. 15). Historic events do not occur in a vacuum; rather these events are the results of earlier events as well as the causes of latter events. The individual learner must be allowed to develop thematic connections between the past and the present and summarize the
stories at regular intervals (Dawson, 2004). As long as the learner regularly re-examines historical content material studied earlier in the same manner that historical evidence, multiple interpretations of the evidence, and other historical concepts are re-examined, the learner will more likely develop a longer lasting understanding of chronology and time (Dawson, 2004).

Understanding chronology enables the learner to grasp two fundamental core concepts of historical understanding. The first fundamental core concept, causality or cause-and-effect relationship, not only links events and situations or connects actions and outcomes together, it also explains why events have occurred or are occurring and forecasts what will happen next (Alonso-Tapia & Villa, 1999; Kinslow, 2011). There are varied types of causes: a main or contributory cause, immediate causes, remote or distant causes, and a causal chain where A causes B, B causes C, and so on; thus an event can lead to or bring a future outcome (Kinslow, 2011). It is also important in recognizing that historical events can have multiple causes and perspectives (Waring, 2010; Kinslow, 2011). If we are able to comprehend the consequences of past human actions and behaviors (i.e., causes), our present or current behavior can be monitored or modified to avoid undesirable outcomes in the future.

The concept of causality shifts the learner from recalling or reporting historical events to explaining and interpreting them (Enright, 2011). Stephen Kern (2004) wrote, “Causal inquiry drives children’s endless why questions as they try to make sense of life” (p. 1). Past research studies have indicated that children can understand a range of logical relationships, including causal and temporal, particularly when presented through a historical narrative that is familiar to them (Downey & Levstik, 1991). Language and text structure in history textbooks matters
a great deal in shaping the learner’s ideas about causality (Achugar & Schleppegrell, 2005; Padua, 2011).

Continuity and change is another fundamental core concept in which a significant event, decision, or phenomenon significantly alters or transforms a society’s ways of life—e.g., norms, beliefs, values, ideals, traditions, institutions, etc.—at a certain point in time (Seixas, 1996). Life experiences, such as living through a war in a refugee camp and then later immigrates to a new country or moving to a new town or state because a parent had lost a job or got transferred to a new position elsewhere, can certainly help the learner to grasp and appreciate the nature of change (Von Heyking, 2004). Change can be a point in which human action or thought deviates from the norm and creates a new universal belief system or attitude (Seixas, 1996); he wrote, “In order to identify historical change, we have to set a phenomenon against an unchanging, or continuous, backdrop” (p. 771). At the same time, the continuity of a phenomenon can become the resulting change from a past or previous event or phenomena (Seixas, 1996).

Evidence is also essential in learning for historical understanding because it presents key pieces of information about the past (Halpin-Healy, 2011; Green, 2011; Erekson, 2011). Information about the past can be found in a whole range of different types of sources, such as all kinds of written documents, images such as cartoon drawings and photographs, and object artifacts (Van Drie & Van Boxtel, 2007, p. 92). Historical evidences can also be presented orally or verbally such as recorded interviews or radio broadcasts. Archived films and videos—both taped and digital—are also considered historical evidences (Lee & Clarke, 2003; Salinas et al., 2011). To many history teachers and students, historical evidences are typically regarded as primary sources. According to the Smithsonian National Museum of
American History (2011), primary sources are “the pieces of evidence that historians use to learn about people, events, and everyday life in the past” (p. 3).

Historical evidences are physical clues to the past and it is up to the historian researcher to examine and analyze the evidences and to draw plausible conclusions as to what happened, when it occurred, how it happened, and why (Hurst, 1981; Seixas, 1993; Barton, 2005). Historical evidence is regarded fundamental to historical inquiry and research (Green, 2011), but it is not the exclusive source of knowing what and why something occurred (Hurst, 1981; Barton, 2005). Primary sources can sometimes represent a narrow perspective or point of view; In order to attain and appreciate deeper understandings of a particular past event and why the event occurred, the learner must examine multiple pieces of evidence (Barton, 2005). Historical evidence may also include secondary sources such as newspaper stories written at the time. “Newspapers…also require corroboration and supporting evidence,” Barton wrote, “A newspaper story has a higher probability of providing reliable information than would a primary source in isolation” (p. 746). Furthermore, learning about a particular event through multiple sources can result to an increased interest in history, critical thinking, historical thinking, and historical understanding (VanSledright & Kelly, 1998).

While evidence is a fundamental component to historical understanding, it is perhaps more essential for the individual learner to learn and know how to approach and handle evidences of the past for historical understanding (Von Heyking, 2004). One of the major themes in Collingwood’s The Idea of History is the relationship between the discipline and historical evidence; what is considered historical evidence remains subjective on the premise of how it would be interpreted and used (Goldstein, 1970). “History, itself, as if becomes increasingly autonomous, becomes the sole authority: far from relying on the reports of
others, it is history itself which decides what is and what is not historical evidence and what possible use this or that historical evidence may have” (p. 25). Analyzing historical evidences allow the individual learner to become knowledgeable in recognizing varied historical perspectives and interpretations, and the creator’s or author’s intentions and purpose (Obenchain, Orr, & Davis, 2011). Examining and analyzing historical evidence contributes to the development of higher-order analytical skills such as the ability to observe, defend and challenge points of views, and make deep inferences on human actions and decisions of the past (National Center for History in the Schools, 2011).

Historical inquiry has been defined as a careful examination of a historical event or phenomena in order to search for information or truth (Gilbertson, 2006). Inquiry is a process in which the learner can ask meaningful questions to find information, draw conclusions, and reflect on plausible solutions (VanSledright, 2004; Levstik & Barton, 2005; Obenchain et. al, 2011). It addresses big ideas in U.S. history and challenges perspectives of historical concepts and issues, enables the learner to construct an understanding of the historical past, and it challenges the learner to examine his or her own beliefs (Lattimer, 2008).

Historical inquiry encourages the individual learner to address and confront societal issues and problems in a logical and systematic fashion (Wilen & White, 1991). The learner engages in conversation by forming or asking essential questions that are worth discussing; the questions typically do not result in a direct or simple answer (Levstik & Barton, 2005). Recent studies have found that student-driven inquiry-based learning stimulates interests and involvement in U.S. history and improves academic achievement (Wilen & White, 1991). Learning opportunities in which the learner is required to engage in historical inquiry have
typically resulted to the learner acquiring a more complete understanding of the sources of historical information (Barton, 1997).

Historical agency plays a major role in creating and developing the historical narrative. It can be described as one person (individual), a group (collective), or a political, social, or cultural institution or force (institutional) taking action responding to past conditions (Levstik, 2010). Upon examining an historical artifact or evidence, historians seek to identify who authored or created it, or those who came across or experienced it. Recognizing agency allows the learner to gain a deep sense and understanding of the historical events and happenings in terms of the state of mind, thoughts, and motives of the participants and witnesses, and realize multiple historical interpretations and perspectives (Little, 2011). Pattiz (2004) wrote, “Students should learn how to analyze multiple perspectives and evaluate the strengths and weaknesses of the arguments embodied within these differing points of view based on the evidence presented” (p. 241). Thornton (1994) suggested that while the demographics of the American student population have changed through the course of the twentieth century, the perspectives of the U.S. history curriculum remains in traditionally representing the historically dominant group. U.S. history is subject to social, cultural, and political perspectives that are likely to impose upon groups and individuals who believe otherwise.

Historical inquiry and agency collectively allow the individual learner to grasp the concept of historical empathy. Historical empathy is a core concept in which the individual learner reconstructs varied perspectives of the past based on available historical evidence (Foster & Yaeger, 1998). Empathy plays a significant role in “the process of adductive, inferential thinking that allows the historian to make sense of past actions” (Foster & Yaeger,
In developing historical empathy, the individual learner reconstructs the beliefs, values, and motives of those who lived in the past (Foster & Yaeger, 1998; Brooks, 2009). What makes this concept challenging is that historians can neither absolutely imagine nor assume life in the past because they never lived or experienced it (Collingwood & Knox, 1946), so instead historians must rely on given knowledge and historical evidence such as primary sources to make sense of why things occurred in the past (Lerner, 1987; Foster & Yaeger, 1998). The challenge of presentism (i.e., reflecting the past through present-day values, beliefs, and norms) limits the learner’s ability to contextualize past events and actions and to realize multiple perspectives in the past (Wineburg, 2001; Brooks, 2009).

**Need, significance, and outcomes**

Learning for historical understanding promotes and fosters good citizenship (Stearns, 1998; McGuire, 2007; VanSledright, 2008). In the United States, learning for historical understanding has upheld the American civic and democratic ideals, values, and beliefs on which this nation was founded (Wineburg, 2001). Practically all U.S. history curriculum documents—at the national, state, and local levels—written and endorsed have asserted the “well-informed and civic-minded citizenry” to build on and sustain democratic traditions and institutions as the single-most purpose and goal for learning U.S. history (Stearns, 1998; McGuire, 2007; National Council for the Social Studies, 2008).

In 1983, the U.S. Department of Education released a document titled *A Nation at Risk* and recommended that a comprehensive understanding of history is necessary to “the informed and committed exercise of citizenship in a free society” (para 10). The Bradley Commission on History in Schools (1988) asserted that history is “vital for all citizens in a
democracy, because it provides the only avenue we have to reach an understanding of ourselves and of our society” (p. 11). The study of U.S. history prepares well-informed citizenry who will be able to identify and confront complex real world issues and to solve real world problems in a global and democratic society (Risinger, 1993). Without the teaching and learning of U.S. history, citizens will inevitably lapse into historical and political amnesia and become unable to protect the basic principles of self-government, justice, and liberty especially during times of crisis (Risinger, 1993).

Historical understanding helps to create a sense of identity as well as to foster a respect for the past, educate a set of moral beliefs, and make sense of the present (Partington, 1980; The Bradley Commission on History in Schools, 1988). There has been an increase of subjects of historical study since the 1960s to include minorities, women, and children. (Steeves, 2007). Teaching and learning for historical understanding requires higher-order critical, analytical, and creative thinking skills that will help prepare students for the world of work (The Bradley Commission on History in Schools, 1988; Perkins, 1994). Skills in research, finding and evaluating sources of information, and recognizing and evaluating multiple perspectives and interpretations, as well as skills in basic writing and speaking are all necessary for success in the workplace (Stearns, 1998; Secretary’s Commission on Achieving Necessary Skills, 1991).

The Secretary’s Commission on Achieving Necessary Skills or SCANS Report (1991), the Bradley Commission on History in Schools (1987), and the Partnership for Twenty-First Century Learning (2001), have collectively acknowledged the importance and value of incorporating critical and higher order thinking skills in teaching and learning for historical understanding because several research studies have concluded that students who are actively
engaged in the learning process perform higher on achievement tests than their counterparts (Bremer & Morocco, 2003; Pattiz, 2004; Wineburg & Martin, 2004; Schmoker, 2011b). While the findings of these initiatives are presently acknowledged in school districts across the United States, many schools still do not implement it (Bremer & Morocco, 2003; Wineburg & Martin, 2004; McGuire, 2007; Schmoker, 2011b).

Present contextual challenges

Some of the literatures reviewed looked for causes as to why a significant percentage of our students were continuing failing in U.S. history by identifying certain conditions that influence how content was taught and received in the U.S. history classroom. The review of the literature identified prevailing conditions that impact the teaching and learning of U.S. history in the classroom such as the standardization and testing movement (Thornton, 1994; Darling-Hammond, 1997; Wineburg & Martin, 2004; McGuire, 2007; Banner, 2009; Soares & Wood, 2010), history textbooks (Mehlinger, 1988; Thornton, 1994; Zenger & Zenger, 2002), teacher preparation to teach history (Ravitch, 1997; Duea, 1995; Wineburg, 2001), and limited opportunities fostering and implementing critical thinking in U.S. history courses (Pattiz, 2004).

State departments of education continue to play a crucial role in determining what should be taught and when it should be taught through state curriculum frameworks. While learning standards are influential in determining the scope and sequence in history and social studies for local school districts, the origin and reliability of the state standards remain unclear and unanswered (Zenger & Zenger, 2002). “In addition, educators from throughout the education system are certainly not in agreement as to the appropriate and effective use of
these standards in planning and assessing school curricula” (p. 214). Learning standards have yet to be fully tested and analyzed to prove its reliability (Schmoker, 2011b). Meanwhile, local school districts continue to develop a K-12 scope and sequence in history and social studies that will enable students to retain content knowledge and demonstrate proficiency in the core concepts of historical understanding.

The standardization and testing movement across the nation along with the constraints of state and local educational policies are largely responsible for the total neglect and abandonment of creating opportunities for teaching and learning for historical understanding (McGuire, 2007; Soares & Wood, 2010). With No Child Left Behind Act of 2001 placing greater and increased emphasis on schools to raise students’ standardized test scores in mathematics and literacy at the expense of other subjects areas, including history, that are not considered “high stakes” (McGuire, 2007; Wills, 2007; Babini, 2013). As a result, teacher-directed recitation remains as the dominant pedagogical approach because it is the easiest way to teach; other ways of teaching requires more energy, more time, and more resources (Mehlinger, 1988).

The predominant pedagogical approach in teaching history in the United States has been typically lectures and whole class discussions (Mehlinger, 1988; Pattiz, 2004; Wineburg & Martin, 2004; St. Jarre, 2008; Maloy & LaRoche, 2010). Students would have the tumultuous task of memorizing facts typically drawn from the textbook, and then regurgitate the information on multiple-choice tests (Maloy & LaRoche, 2010). Students continue to graduate from high school with having little understanding about their nation’s history and government despite having taken history and social studies classes throughout their K-12 schooling (Jackson, 1989). Many of our students have been taught to memorize a list of dates
and events, or to recite a narrative or story presented as fact through a single interpretation, yet are unable to apply knowledge and skills to new situations (Mansilla & Gardner, 2008; Wineburg, 2001). U.S. history classes continue to enable students remain passive in their learning; students continue to consume content through readings and lectures, and then expected to recall content information through objective assessments that are riddled with multiple choice, matching, identification, and true-or-false items. Essay items tend to measure knowledge of facts and not enough of analyses and assessments of historical evidences or primary sources.

Wineburg (2001) stated that American children have been learning about the past at home, from celebrating holidays with family and friends, through television, movies, and the Internet. Rather than to assume that young children “do not know history,” teachers should focus on what students already know about the past and understand how students make sense of the past including their family and community histories (Leinhardt, 2000; Wineburg, 2000; Levstik & Barton, 2005). The majority of American high school students learn U.S. history through textbooks (Mehlinger, 1988; Cuban, 1991; Wineburg, 2000), but the general nature of U.S. history textbooks is typically weak in content. It sacrifices depth for breadth by covering as much material as possible while omitting contextual information for deeper understanding (Mehlinger, 1988; Ferretti, MacArthur, & Okolo, 2001). U.S. history textbooks, for the most part, are regarded by many students and teachers as an authoritative source of historical information (Mehlinger, 1988; Ravitch, 1998; Paxton, 1999). Teachers who are assigned to teach a course yet are unfamiliar with the material will rely on the textbook as a main source of historical information; they are also unlikely to ask questions or
pose issues or develop activities “that give the spark of life to the words in the textbook” (Ravitch, 1998, p. 499).

Standardized testing in U.S. history tended to focus on trivial historical information and do not engage students in thinking and processing. As a result, students are not taught to think critically in history classes (Pattiz, 2004). History classes continue to place students as passive learners and constantly receive content through reading and lectures and are expected to recall the information through objective assessments riddled with multiple choice, matching, identification, and true-or-false items (Darling-Hammond, 1997; Bremer & Morocco, 2003; Wineburg & Martin, 2004; McGuire, 2007; Banner, 2009; Schmoker, 2011b). Essay items tend to measure knowledge of facts instead of analyses and assessments of historical evidences or primary sources. Stephen J. Thornton (1994) suggested that teachers must work within the constraints partly due to uncontrollable external factors, such as mandated tests, limited time and resources, and preparing students for the next grade level: “To some extent, even the most dedicated teachers must distinguish between how they would ideally teach and what they think is possible in their current circumstances” (p. 226).

The fact remains that American students continue to perform poorly on history tests (Ravitch, 1988). Overall low scores on the 2010 National Assessment for Educational Progress (NAEP) U.S. history and government fourth, eighth, and twelfth grade assessments reveal that despite numerous research studies findings about ways to improve teaching and learning for historical understanding in our schools over the past decades, either our schools have not incorporated them or, if schools have incorporated them, they are not proven effective in producing widespread positive results. The 1994 NAEP results in U.S. history revealed that over half of high school seniors scored below basic in U.S. history; students
performed worse in U.S. history than in any other subject tested (Ravitch, 1998). The 2010 NAEP results showed little improvement since the 1994 results; only 25 percent of fourth, eighth, and twelfth graders collectively scored proficient or higher. In response to the 2010 NAEP results, retired U.S. Supreme Court Justice Sandra Day O’Connor (2011) remarked at a press conference that there is “a crisis on our hands” when it comes to history and civic education.

What is equally important in learning for historical knowledge and understanding is for teachers to discover students’ present knowledge of U.S. history content and realize how students approach the study and learning of U.S. history (Wineburg & Martin, 2004; Mayer, 2006; Bain, 2011). In their respective studies, Bain (2011) and Wineburg (2001) have observed how historians typically read and think historically, and how the historians’ approach differed from those of students and teachers. A major revelation upon the review of the literature was that teachers and students generally relied on historical interpretations of evidence (e.g., artifacts, primary source documents, etc.) presented by history textbook authors as rigid truths and facts, when historians tend to approach evidence through a variety of strategies of historical analysis including chronology, attribution, context, and varied interpretation of text (Yaeger & Wilson, 1997; Wineburg, 2001; Mayer, 2006; Bain, 2011).

Perhaps one of the most intriguing claims learned from the review was the training and preparation and practical experiences of K-12 classroom teachers teaching history in our schools. More than half of the history teachers in public schools did not major or minor in history while training to become history teachers in their undergraduate years in college (Jackson, 1989; Duea, 1995; Ravitch, 1998; Wineburg, 2001). Diane Ravitch (1998) reported that according to the National Center for Educational Statistics’ “School and Staffing Survey”
1996 report, “over half of all public school students…were taught by teachers who did not have at least a minor in history” (p. 496). When rote memorization is heavily tested in college survey courses, it may reappear in the next generation of secondary school teaching (Steeves, 2007).

While the No Child Left Behind Act (2001) addressed the issue by ensuring classroom teachers to be “highly qualified” in the subject matter they are teaching, the matter has not been fully resolved (Schmoker, 2011). The definitions of history and social studies are left ambiguous and at the discretion of each state (Mehlinger, 1988; Ravitch, 1998) and once history teachers received their teaching credentials they are called on to teach any course in the social studies curriculum (Ravitch, 1998; St. Jarre, 2008; Wineburg, 2001). History teachers can be asked to teach economics, anthropology, psychology, sociology, and political science, when in fact they never had taken such courses in their undergraduate or graduate schooling. “No single undergraduate major corresponds to the demands of the typical social studies curriculum” (Wineburg, 2001, p. 149).

Ravitch (1998) found that most social studies teachers earned an undergraduate degree in education and not in history; only slightly fewer than 19 percent of the teachers had a major or minor in history. Jackson (1989) was more frank in his assertion that “college teaching and college teachers are largely at fault for the problems of teaching history today” (p. 78). This leads to another problem: “The teacher who must teach a course that includes unfamiliar material will rely on the textbook as a primary source of information and is unlikely to raise questions or pose issues or develop activities that give the spark of life to the words in the textbook” (Ravitch, 1998 p. 499). The textbook becomes the driving force in curriculum, instruction, and assessment in history classes across the nation.
The ways in which history teachers deliver instruction in history largely depends on what they know and understand the subject matter (Yeager & Wilson, 1997). Teachers who are highly knowledgeable in history are cognizant of the multiple interpretations and causations of the historical evidence being presented to students (Downey & Levstik, 1991; Yaeger & Wilson, 1997). U.S. history teachers tend to teach history as an academic discipline based on how students approach studying and learning history (Yaeger & Wilson, 1997). Stephen J. Thornton (1994) suggested that teachers must work within certain constraints partly due to uncontrollable external factors, such as mandated tests, limited time and resources, and preparing students for the next grade level: “To some extent, even the most dedicated teachers must distinguish between how they would ideally teach and what they think is possible in their current circumstances” (p. 226).

For decades, U.S. history has constantly struggled to remain a core academic subject area in elementary and secondary schools in the United States (The Bradley Commission, 1988; Downey & Levstik, 1991). As school districts across the United States were held accountable to student achievements in math, science, and literacy, the subjects in history and social studies were pushed to the side (see Babini, 2013). According to a 2011 focus group study by the Farkas Duffett Research (FDR) Group, this marginalization is more apparent in the elementary grades, 81 percent of elementary teachers surveyed reported that other subjects, including history and social studies, are not taught in order to provide increased instruction and support to mathematics and language arts, and 93 percent of those surveyed believe that this “narrowing of the curriculum” is largely driven by state tests in math and language arts (Common Core, 2011).
In 2009, the Massachusetts Board of Elementary and Secondary Education voted to indefinitely suspend the state’s history and social studies assessment and waive the graduation requirement (Chester, 2009). In January 2012, the Virginia Senate passed a bill that eliminated history testing in Grade 3. The Common Core state standards placed History and Social Studies as a subset under the umbrella of Literacy in reading and writing. Schmoker (2011b) asserted that incorporating history and social studies into the Common Core State Standards, as it currently exists diminishes the value and true purpose of learning and understanding history.
Chapter III: Methodology

Research question

The overarching research question for this qualitative case study was: “What does learning for historical understanding look like in public high school standards-based U.S. history classrooms?” The intent of the overarching research question explored the current problem of educational practice and drove the qualitative research case study. As the review of the literature suggested, incorporating key core concepts of historical understanding through instructional activities and practice have consistently enabled students to develop a deep understanding of historical concepts, themes, and ideas (McTighe & Wiggins, 1999; Marzano, 2003; Prince, 2004; DuFour et al., 2004; Smith et al., 2005; Caldwell, 2007; Stoskopf & Bermudez, 2008; Gardner et al., 2010). The problem of practice, however, has exposed a disconnect between incorporating core concepts of historical understanding in instructional practice and the constant high rate of poor student academic performance and achievement in U.S. history in our high schools (Thornton, 1994; Duea, 1995; Ravitch, 1998; Bremer & Morocco, 2003; Evans, 2004; Wineburg & Martin, 2004; Ross 2006; McGuire, 2007; St. Jarre, 2008; Schmoker, 2011b).

The primary focus of the qualitative research case study was to better understand how students study and learn U.S. history in today’s classrooms. One major goal of this case study research was to provide educators useful information on what does effective student learning for historical understanding look like in today’s public high school U.S. history classrooms. As the K-12 Director of Social Studies for a public school district in eastern Massachusetts, I am particularly invested in exploring and discovering new information on how high school
students achieve historical understanding effectively and how educators can capture and take advantage of this information and create meaningful opportunities to enhance effective student learning in our high school U.S. history classrooms.

As the primary researcher for this case study, I have always been interested in finding ways to create opportunities to foster learning for historical understanding in U.S. history classrooms. As the history education community continues to research and develop new ways to disseminate historical content and information, discover different approaches in curriculum design, plan new strategies in instructional practices in the classroom, and develop new and alternative assessments to better accurately reflect a student’s knowledge and understanding of U.S. history, educators must also recognize that today’s students have more access to information and are potentially more knowledgeable in history than yesterday’s students.

Given the advancements in technology and social media, current educational policies, and the availability and access to print and online resources, learning U.S. history today is far different from how it was learned thirty, perhaps even twenty, years ago. In the early 1990s, the Internet was in its infancy and there was limited information. As a classroom history teacher, I brought my students to the school’s library to conduct research using print source including encyclopedias and history topic-related books many of which were copyrighted in the 1970s. Students were also encouraged to visit their local public library to conduct further research. Today, classroom teachers take their students to a media center and use online resources and directories, offering updated and current information that encyclopedias and books could not immediately provide. The Internet has expanded students’ ability to search for greater and deeper information that students of twenty years ago could not have been able to achieve immediately. Furthermore, significant advancements in technology, media, and
social media has provided more information and data on historical topics, expanding opportunities for students to explore and examine multiple perspectives and analyses that typical U.S. history survey textbooks do not provide.

In recent decades, an amazing amount of history content has become more accessible and available to the public than ever before. Contemporary authors such as Doris Kearns Goodwin (Team of Rivals: The Political Genius of Abraham Lincoln), David McCullough (John Adams), Chris Matthews (Jack Kennedy: Elusive Hero), and Jon Meacham (Thomas Jefferson: The Art of Power) to mention a few have each offered their respective expertise knowledge and insights on various topics and figures in American history and have taken number one spots on various national booksellers’ lists. Television and film have also brought a renewed popular interest in American history in recent decades including Alex Haley’s historical novel-based television miniseries, Roots, popular HBO miniseries including Band of Brothers and John Adams, Steven Spielberg’s 2012 film Lincoln, the historical biographical sports film on Jackie Robinson, 42, and the 2013 Oscar-winning film adaptation of Solomon Northup’s story, 12 Years a Slave.

While it can be argued that books, films, and television have a common tendency to recreate events for dramatic purposes and that audience should not accept these media as one hundred percent historically accurate, they have at least resuscitated the interest to learn and know more about our nation’s history and the individuals who have contributed and sacrificed their lives to form a more perfect union (Stearns, 1998). With that said, students today have great potential access to learn U.S. history content more than ever before. It is what made this problem of practice so intriguing, and so I wanted to explore and investigate possible factors
that have caused high school students to continually perform below average on achievement tests in U.S. history.

This case study research attempted to explore and investigate the contextual conditions in our public education system that impact how high school students study and learn U.S. history inside and beyond the classroom walls today. The themes and findings from the research data gathered for this case study were intended to inform educational policymakers and, more importantly, public school educators on ways in which today’s high school students study and learn historical content most effectively, what opportunities and activities will help enable, foster, and enhance learning for historical understanding, and how recent trends and changes in our education policies, in our public schools, and in how we access historical content, have impacted the way in which our students study and learn U.S. history today.

In support of the overarching research question, this case study explored the following sub-questions:

• How do teachers describe their experience with effective learning for historical understanding?

• How do students experience effective learning for historical understanding?

• What types of structures and strategies help support or impede opportunities for student learning for historical understanding?

This qualitative case study explored and investigated how public high school teachers teaching U.S. history described effective student learning for historical understanding in the U.S. history classroom. The study also examined how high school students experienced and
reacted to the learning process when core concepts of historical understanding were incorporated in the U.S. history curriculum and activities. As the primary researcher, I collected and analyzed several perspectives, insights, and experiences of participants through one-on-one semi-structured interviews and U.S. history classroom observations in order to understand and appreciate the holistic context of the problem of practice (Tellis, 1997; Maxwell, 2005; Creswell, 2009). In addition to collecting data from participants through interviews and observation notes, the gathering of documentary artifacts including lesson plans, students’ works, and curriculum resource materials used in supporting instruction were extremely helpful to provide contexts to the teacher interviews and classroom observations. The collective data brought an array of experiences, perspectives, and insights on learning for historical understanding.

The nature of the problem of practice and the overarching research questions required a qualitative case study design. Yin (2009) defined case study research as “an empirical inquiry that investigates a contemporary phenomenon within its real life context, especially when the boundaries between phenomenon and context are not clearly evident” (p. 18). A case study research was appropriate because I wanted to capture the present problem of educational practice and examine the existing conditions that can influence and shape interpretations, perceptions, experiences, and insights on learning for historical understanding within the bounded system of the public high school classroom. Stake (1994) suggested that a case study is useful when “opportunity to learn is of primary importance” (p. 244). I chose a qualitative research because I wanted to explore and examine the problem in a holistic perspective so that “attention can be given to nuance, setting, interdependencies, complexities, idiosyncrasies, and context” (Patton, 1990, p. 51). Qualitative researchers
generally sought to better understand how “people interpret their experiences, how they construct their world, and what meaning they attribute to their experiences” (Merriam, 2009, p. 5). This qualitative case study attempted to take snapshots of current instructional practices in U.S. history and explore pedagogical methods and learning conditions to enhance effective student learning on our nation’s political, social, cultural, and economic histories and its collective impact on our lives and society today and in the future.

I was primarily interested in identifying and examining conditions of the learning environment that had an affect on student learning for historical understanding in the U.S. history classroom (Schell, 1992; Yin, 2004). Because qualitative research tended to focus largely on processes, I concentrated on the process of learning for historical understanding in the classroom (Yin, 2004). I was compelled to remain flexible in my initial analysis of the data gathered as the ongoing collection and analysis of data have created opportunities for further or new avenues of inquiry (Moen, 1998).

**Research approach and design**

For this qualitative research case study, I served as the primary researcher and became the primary instrument for data collection and analysis (Marshall & Rossman, 1999; Yin, 2003). The approach was descriptive and focused on exploration of the problem and research question (Moen, 1998). I collected and examined multiple sources of evidence throughout the study. Some of the sources of the data gathered included one-on-one in-depth semi-structured teacher interviews, non-intrusive classroom observations, and a selected collection of documentary evidence such as curriculum unit guides, lesson plans, course worksheets, assessment and scoring rubrics, and student works.
This case study was suitable for qualitative research because the main intent was to capture the present problem of educational practice and examine the existing conditions that can influence and shape interpretations, perceptions, experiences, and insights on learning for historical understanding. Yin (2009) defined case study research as “an empirical inquiry that investigates a contemporary phenomenon within its real life context, especially when the boundaries between phenomenon and context are not clearly evident” (p. 18). This case study was intrinsic in that the primary researcher had a genuine and compelling interest in understanding why conventional and traditional methods of instruction remain the dominant method in U.S. history classes despite contemporary studies on learning for historical understanding (Yin, 1984; Stake, 1995; Baxter & Jack, 2008).

The study was descriptive because I had planned to observe first-hand how core concepts of learning for historical understanding were incorporated and measured in the real life context in which it occurred (Yin, 2004). It was essential that data collection occurred in the real world setting to better understand how key core concepts of learning for historical understanding impacted student learning in the high school U.S. history classroom (Patton, 1990). It was also critical for me as the primary researcher to remain passive and objective throughout the data collection and analysis process (Shuttleworth, 2008). The researcher as observer planned to take snapshots of current practices of incorporating key core concepts of learning for understanding in U.S. history classrooms and examined the methods and learning conditions that affected student learning on our nation’s political, social, cultural, and economic histories and its collective impact on our lives and society today and in the future.

This case study also sought to discover the why and the how (Yin, 2003). If recent studies on learning for historical understanding have already shown that incorporating core
concepts of learning for historical understanding lead to increased student engagement in the learning process and improved academic performance in U.S. history, then why have we yet to see the paradigm shift in how U.S. history is taught and learned in the classrooms? If we already know the effectiveness of incorporating core concepts of learning for historical understanding, then why do teachers continue to teach U.S. history through lectures, PowerPoint slide shows, and videos? How can we promote and increase the incorporation of core concepts of learning for historical understanding in the classroom?

In order to examine what learning for historical understanding looks like in the classroom, it was critical for me to focus on the lived experiences of both teachers and students who participated in the case study (Zucker, 2009). I made sure not to impose any hint of evaluating or judging the participants’ knowledge of what student learning for historical understanding looked like in the classroom. The main intent of the primary researcher was to learn through interviews and observations how high school U.S. history teachers described what learning for historical understanding looked like in the U.S. history classroom. The researcher conducted classroom observations to take notes on how students attained and displayed learning for historical understanding in today’s learning environment.

A major challenge for this study was making sure that the data collected were reliable, credible, and valid (Patton, 1990; Silverman, 2000; Creswell, 2009). It was critically important to collect data from a variety of independent sources. Using multiple methods and data sources can greatly enhance the validity of research findings, reduce bias, and dismiss rival explanations (Mathison, 1988; Tellis, 1997). Another major challenge for me was refraining from ego and personal bias; I avoided making assumptions throughout the research
process and I made sure to collect and analyze data in the most objective manner as possible (Creswell, 2009).

Having taught U.S. history in the classroom since the early 1990s and now entering my sixth year as a K-12 social studies curriculum director, I have established over time a fixed set of opinions, beliefs, and attitudes on teaching and learning in the classroom, most of which are substantiated through personal experiences in the classroom as a student, teacher, and administrator, and ongoing interactions with immediate teacher colleagues and supervisors, students, and parents. It was very important for me, as primary researcher for this case study, to step outside my world-views on teaching and learning, set aside my beliefs and biases, and to examine more closely at the problem of practice at hand without injecting what I have learned and assume about student learning. It was particularly important for me to ask non-leading open-ended questions in the one-on-one teacher interviews. I remained vigilant and disciplined not to ask participants any questions that can be misinterpreted as evaluating or judging their teaching or academic performance; I also made sure not to ask any questions that assumed the participants to possess some or any background knowledge and understanding of historical content or concepts prior to data collection.

The overall design of the qualitative research case study focused on the research study’s goals and objectives, the theoretical framework of the study, the literature, and the research questions (Moen, 1998; Merriam, 2009). My proposed study approach and design of the preliminary activities laid the groundwork of the research analyses and findings:

- Preliminary activities provided rationale for the study and presented background knowledge to present the proper context of the problem of educational practice; this
included a comprehensive review of the literature, alignment of the theoretical framework (i.e., learning for historical understanding theory), and a proposed outline of research activities and strategies. Other activities included preliminary interviews with U.S. history teachers, who offered first-hand experiences with learning for historical understanding in the classroom, and a presentation of the researcher’s findings on what learning for historical understanding look like in the classroom.

- In order to address the research questions precisely and accurately, the researcher collected sufficient data through multiple methods of data collection and sources of evidence. The researcher then coded the data as the primary method of data reduction, which ensured the preciseness and pertinence of the data in its analysis.

- The researcher included key findings from observation and interview notes, document and evidence gathering in the final report.

- Once the themes and findings from the data analysis was determined, the researcher then reviewed the research questions and theoretical framework and revise and enhance the conceptual model of the study when warranted. A resulting set of preliminary findings were identified, including proposed plausible relationships between activities, policies and procedures, resource materials, professional training, and the physical and social conditions (internal and external forces) affecting learning opportunities and the learning environment.

- The participants of the study and leading experts in learning for historical understanding theory were given the opportunity to review the data and findings, and to respond and comment on the data and findings to ensure the accuracy and credibility of the study.
• The results of the study’s activities were compiled and presented into a final report.

Because a critical element of the research is the collection, reduction, and analysis of the data, the researcher must determine and identify the primary sources and methods for collecting data. It should also be acknowledged that the overall approach and design of the study presented is flexible and adaptive in nature to reflect the possible evolution or growth of knowledge and understanding obtained through the data collection process (Lincoln & Guba, 1985).

A multi-site case study

The case study involved five U.S. history teachers and three U.S. history classrooms in two public high schools in eastern Massachusetts, particularly in suburban-urban communities situated outside of the city of Boston. The data collected from these two sites increased the validity of the research findings and could potentially be used for future researchers on the topic (Merriam, 2009). Two suburban school districts had agreed to participate in some aspects of the case study. The researcher sought to include a third high school to participate in the study, but unfortunately scheduling conflicts did not allow such participation to occur. The school districts identified, asked, and chosen were mainly used to allow purposeful sampling methods in order to obtain information-rich data (Patton, 1990; Merriam, 2009).

One factor in choosing sites for the study was based on the selection criteria, which was provided by the research question as Marshall & Rossman (2006) have pointed out. The research question sought to choose U.S. history classes in traditional public high schools in which core concepts of learning for historical understanding were being incorporated in
lessons on a consistent or frequent basis. The study invited experienced high school U.S. history teachers with professional licensure status to participate in the study. District and building administrators with curriculum and instruction supervisory responsibilities have assisted me in identifying experienced high school U.S. history teachers who have incorporated the core concepts of learning for historical understanding in U.S. history classes.

Purposeful convenience sampling (Merriam, 2009) was also based on convenience to the researcher’s base in eastern Massachusetts, particularly in the metropolitan Boston area. In seeking and selecting a third potential school district, I sent letters of invitation to a number of urban and suburban school districts throughout the Boston metropolitan area, and included pertinent information about the case study and copies of the protocols that would be used to collect data for the study.

As for the two school districts that have already agreed to participate in the study, one of the two high schools is considered suburban, which was self-defined by the school district in its official school website as well as designated by the Massachusetts Department of Elementary and Secondary Education. The other school district has been designated as urban/suburban. The designation of the two districts is based on a number of factors including total population, population density per square mile, and socio-economic status of the residents. The two high schools—which shall be identified as Washington High School and Lincoln High School respectively—service a total of 2,816 high school students. The two high schools will be the research sites for the case study.

According to the Massachusetts Department of Elementary and Secondary Education (2012), Washington High School demographic breakdown in the 2011-2012 school year is 60
percent white, 21 percent African-American, 9 percent Hispanic, 8.6 percent Asian, and 1.4 percent Multi-race, non-Hispanic. 27 percent of high school students are on free and reduced lunches, 15 percent receive special education services, and 6.7 percent is Limited English proficient. 23.5 percent are students whose first language is not English. Gender is evenly split (627 females and 600 males). The average class size at Washington High School is 16; this number reflects both general and special education classes. The ratio of student to computer is three, and every classroom has access to the Internet. The district’s total expenditure per pupil is $13,093, which is very close to the state average ($13,361).

Washington High School’s four-year adjusted cohort graduation rate for 2011-2012 is 91 percent, according to the Massachusetts Department of Elementary and Secondary Education website in which all Massachusetts school district profiles for 2011-2012 are posted. Washington High School’s graduation rate is up from 80 percent in 2010-2011, and 78 percent in 2009-2010. However, its dropout rate is higher (3.6 percent) than the state average (2.7 percent). Daily attendance rate is reported at 94 percent. Seventy-four percent of Washington High School’s students who graduated in 2010 have reportedly attended either a two-year or four-year college or university. 35 percent of the students in the Class of 2012 at Washington High School plan to attend a four-year private college and 28 percent plan to attend a four-year public college. 19 percent plans to attend a two-year private or public college after graduating from high school.

Washington High School’s building administrative team consists of a Headmaster (principal) and three housemasters or assistant principals. The district administrative team consists of 6-12 curriculum directors and coordinators in all subject areas (English Language Arts, Mathematics, Science, History and Social Studies, Health and Physical Education, Art,
Music, Foreign Languages, Special Education, and Guidance) and collaborates with the high school administrative team as well as with middle school principals. The directors and coordinators report directly to the Assistant Superintendent of Curriculum and Instruction, and collaborate with the Assistant Superintendent of Elementary Education to deal with academic issues concerning curriculum, instruction, and assessment at the elementary level.

There are 91 full-time teachers at Washington High School of which 98 percent of the core academic teachers are licensed in their respective teaching assignments. Washington High School’s social studies teaching staff consists of 12 full-time classroom teachers. Of the 12 teachers, 8 have earned either a Masters in Arts (M.A.) degree or Masters in Education (M.Ed.) degree, and 2 teachers hold a Juris Doctorate (J.D.) degree. Ten of the 12 social studies teachers currently hold a professional teacher license either in History (9-12) or Political Philosophy/Political Science (9-12). Three of the 12 social studies teachers have taught at Washington High School for at least 15 years with the longest employed for 35 years. The majority of the staff at Urban High School was hired between 1995 and 2000; Washington High School is considered their first place of employment. The social studies department has remained relatively the same for the past two years, according to the social studies department chair at Washington High School.

At Lincoln High School, there are six Honors U.S. History sections and three College Preparatory U.S. History sections. Roughly 66 percent of the student body of the junior class (227 out of 341 total students) is enrolled in honors (151 students) and college preparatory (76 students) level U.S. history classes at the high school.
According to the Massachusetts Department of Elementary and Secondary Education (2012), Lincoln High School’s demographic breakdown in the 2011-2012 school year is 81 percent white, 10 percent Asian, 5 percent African-American, and 4 percent Hispanic. 15 percent of high school students are on free and reduced lunches, 19 percent receive special education services, and 1 percent is Limited English proficient (LEP). Gender is evenly split (834 males and 818 females). The average class size at Lincoln High School is 18 students; this number reflects both general and special education classes. The ratio of student to computer is four, and every classroom has access to the Internet. The district spends roughly $2,000 less ($11,176) than the state average ($13,361) in total expenditure per pupil.

Lincoln High School’s graduation rate has remained high with at least 92 percent of students earning a high school diploma for three consecutive years: 92.5 percent (Class of 2010), 95.2 percent (Class of 2011), and 94.7 percent (Class of 2012). Graduates attending higher education institutions were also reported high for the past three years, with 84 percent (Class of 2010), 86 percent (Class of 2011), and 89 percent (Class of 2012). At the same time, the high school has maintained a low dropout rate at 0.6 percent. Attendance rate is reported at 95.7 percent.

Lincoln High School’s building administrative team consists of a Headmaster (principal) and three housemasters (assistant principals). The district administrative team consists of K-12 curriculum directors and coordinators in all subject areas (English Language Arts, Mathematics, Science, History and Social Studies, Health and Physical Education, Art, Music, Foreign Languages, Special Education, and Guidance) and collaborates with the high school administrative team as well as with middle school and elementary school principals.
Lincoln High School’s history and social studies department consists of 13 full-time classroom teachers. Of the 13 teachers in the department, 10 have earned a Master Degree in Education with a concentration in History within the last five years; two are currently pursuing Master Degree in Education with a concentration in History, and one teacher is considering in pursuing a Master degree in education administration. Ten teachers hold a professional license in History (9-12) or Political Science/Philosophy (9-12) issued by the Massachusetts Department of Elementary and Secondary Education; three currently possess either an Initial or Initial Extension license. The number of years teaching in the high school ranges from five years to fourteen years. The oldest teacher in the social studies department is 43 and the youngest is 27. The high school social studies department has remained the same for the past five years.

This qualitative case study mainly focused on honors and college preparatory U.S. history classes with an average enrollment of 25 students who were taught by U.S. history teachers with 10 or more years of professional teaching experience. Honors and college preparatory classes consisted of high school students with varied learning abilities. Honors and college preparatory level of instruction were designed to prepare students for basic college level work. Content addressed in the U.S. history program were identical in all levels (i.e., Advanced Placement, Honors, College Preparatory, and Standard) at the high school.

Participants and participant selection

Honors and college preparatory students at both high schools were invited to participate in one of three focus groups, to be held at their respective high school after the regular school day, to share and describe their experiences on studying and learning U.S.
history, identify strategies for their own learning were effective, and what resources and materials available to them were helpful in learning for historical understanding. The primary researcher planned to identify and select up to seven to eight students for each focus group. The intent of the selecting student focus group was to reflect the demographic breakdown of the high school’s junior class. The identities of the students participating in the focus group were to remain confidential throughout and after the research study. Because the students are under the age of eighteen, parents must provide their consent for their child to participate in the study.

At the time of the data collection process, the teachers at the two high schools taught honors and college preparatory U.S. History this year (2012-2013). Each teacher has taught U.S. history at the high school level for over 6 years. The teachers who taught U.S. history had earned a Masters degree in education with a concentration of history. Both district curriculum directors and teachers in the two school districts have maintained the teachers have received extensive professional development training in teaching and learning for historical understanding through Teaching American History grants, graduate-level history education courses, and through district-sponsored workshops for the past five years. I invited all teachers who taught U.S. history from each high school to voluntarily participate in this case study. The teachers were invited to participate in semi-structured one-on-one interviews, and to allow me to conduct non-intervening observations of full U.S. history lesson units in their classrooms for several consecutive days, depending on the nature and length of the U.S. history lesson observed.

The student and teacher participants were invited to participate on a voluntary basis, and were provided an informed written consent form. All aspects of the research study were
presented in detail to all potential participants prior to giving consent to the researcher. The participants were informed of the goals and intent of the research study, and were assured they could opt to drop out of the study at any time without giving reason and without consequence.

**Stages of data collection**

The collection of data for the research study took place in April and May 2013. Data collection for this case study incorporated the following principles: use multiple sources of evidence, create a case study database, and maintain a chain of evidence (Yin, 2003). In order to capture and examine an accurate context of the problem of practice, it was essential to collect as many data and evidence through a variety of methods (Creswell, 2009). No single source was dominant over other sources; collectively the sources were used to complement one another so it was vital for me to use as many sources related to the study (Tellis, 1997). Teacher interviews, field notes from classroom observations, and documentary evidence became the data for this qualitative research case study. The research study collected a variety of data including semi-structured one-on-one interviews with classroom teachers teaching U.S. history, field observation notes, collection of artifacts such as curriculum unit and lesson plans, and curriculum resource materials used in support of instruction. These multiple sources of data collectively captured the overall experiences from teachers and students on how student learning for historical understanding have occurred in the U.S. history classroom, and what contextual conditions of the learning environment were influential or impactful to create opportunities and continue attain and demonstrate learning for historical understanding.
Data collection in this case study occurred in three distinct stages. The first stage included in-depth semi-structured interviews with experienced U.S. history teachers with professional status (at least two from each participating high school), and collected program data to present accurate contexts of the learning conditions and environment under study; this included course descriptions in the school’s program of studies, overview of student learning expectations, the physical environment (i.e., classroom, computer lab, media and research center, etc.), and student handbook. The second phase involved classroom observations and the collection and examinations of documents and artifacts, including curriculum unit guides and lesson plans. Stage three was facilitating and small (between five and six) student focus group to collect data on how high school students engage with and respond to instruction and materials when core concepts of learning for historical understanding have been incorporated and implemented in the lesson unit. Unfortunately, the student focus groups did not occur because of students’ scheduling conflicts after school and lack of student interest in participating in the case study.

Table 3.1

*Data collection timeline (April-May 2013)*

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invite teacher participants</td>
<td>April 20 through May 5</td>
</tr>
<tr>
<td>Consent forms signed</td>
<td></td>
</tr>
<tr>
<td>Semi-structured one-on-one interviews with teachers</td>
<td>April 25 through May 15</td>
</tr>
<tr>
<td>Conduct classroom observations (5 days); Gather documents</td>
<td>April 27 through May 15</td>
</tr>
<tr>
<td>Invite student participants for focus group</td>
<td>April 20 through May 30</td>
</tr>
<tr>
<td>Consent forms signed</td>
<td></td>
</tr>
<tr>
<td>Student focus group</td>
<td></td>
</tr>
</tbody>
</table>
Teacher interviews

Interviewing is the basic mode of inquiry to gain in-depth insights of the educational issues through the experiences of those who are impacted by it (Seidman, 2006). The primary purpose of conducting an interview is for the researcher to collect information about an individual’s experience and insights on a particular topic, issue, or matter because the researcher is genuinely interested in understanding the lived experience of individuals and what they make out of that experience (Patton, 1990; Seidman, 2006). The individuals interviewed were regarded as participants for this research case study for they reflect on and describe his or her experiences about when and how student learning for historical understanding occurs, or looks like, in the classroom (Seidman, 2006).

The one-on-one semi-structured interviews help provided pertinent critical information that the researcher did not directly observe in the classroom (Patton, 1990; Creswell, 2003; Baxter & Jack, 2008). Because it was not possible for the researcher to totally enter the participant’s stream of consciousness and lived experience, the researcher intended to explore and understand the actions and behaviors of the participants through an in-depth, semi-structured interview (Seidman, 2006). Observations provided access to the participant’s actions and behaviors, yet it was the interview that allowed the researcher to put the participant’s actions and behaviors into context and provide access to understanding their actions and behaviors (Seidman, 2006, p. 10).

The general format of the interviews were semi-structured to allow participants to respond to the questions with their own frame of reference than being constrained to narrow-focused topics or that would inspire a biased response (Baxter & Jack, 2008). The interview
consisted of open-ended questions that allowed participating teachers to openly describe what they observed when their students demonstrate effective learning for historical understanding in the classroom (Seidman, 2006). The teachers also had an opportunity to reflect on the varied contextual conditions that contributed to enabling and fostering effective learning for historical understanding.

According to Yin (2009), the researcher must possess the ability to ask pertinent questions and to interpret the responses, be a good listener, be flexible and adaptive in responding to various situations, be unbiased by preconceived notions, and have a strong grasp of the issue being studied. At the same time, the researcher must keep in mind of several areas to be cautious when preparing and conducting interviews (Seidman, 2006). The researcher must accept and embrace the fact that the participants’ stories are most important, and that the researcher’s ego and current knowledge must never intervene at any point in the interview (Seidman, 2006). Therefore, interview questions were prepared thoughtfully and carefully. The questions neither contained nor hinted assumptions or biases of the researcher as it could have inadvertently influence the participant’s responses to the questions asked. Questions had to be open-ended to allow the participants to respond freely and openly (Seidman, 2006).

The interview questions were crafted to avoid any feelings by the participants that he or she was judged or evaluated in any way; the primary intent of the case study research project was for the researcher to learn and comprehend how one experiences when learning for historical understanding and what it looked like in the U.S. history classroom. The participants were open and free to present their experiences in their own words (Seidman, 2006). The U.S. history teachers who participated in this case study were established
professional experts in the field of teaching and each have demonstrated mastery of the core
concepts of teaching and learning for historical understanding as determined by their
supervisor and building principal.

Dolbeare and Schuman (Schuman, 1982) developed an approach to interviewing
participants by conducting a series of three separate interviews with each participant. This
three-interview series helped to bring contexts to meaning of experiences of the participants
(Seidman, 2009). The first of three interviews primarily focused on establishing context of the
participant’s experience by allowing the participant to tell as much as possible about him or
herself about their experiences in learning U.S. history (Seidman, 2009). Open-ended
questions included asking the teacher when he or she encountered learning U.S. history for
the first time, what about learning U.S. history did he or she enjoy so much, and what led him
or her to become a U.S. history teacher. The responses provided the teacher the opportunity to
reflect what learning for historical understanding meant to him or herself.

The second interview concentrated on the details of the participant’s experience by
reconstructing the details of their classroom experiences (Seidman, 2006). The teachers were
asked to describe a lesson or activity when students displayed deep understanding of an
historical event or issue; what strategies did their students utilize or employ that resulted to
learning for historical understanding and what behaviors or actions did their students display
to confirm they have learned. Teachers were free but not required to reflect on varied possible
contextual conditions that have enabled or fostered effective student learning as a way to
reconstruct how the learning process occurred in the lesson or activity.
The third and final interview asked U.S. history teachers to make meaning from his or her experience of interacting with and observing their students attaining and demonstrating a deep understanding of a historical event or issue in the classroom (Seidman, 2009). Teachers were given the opportunity to describe what was his or her greatest takeaway from the experience. Open-ended questions prompted the teachers to discuss and describe how the experience has influenced his or her attitudes and insights about effective student learning for historical understanding and explain ways to create opportunities to incorporating the core concepts of learning for historical understanding. The interviews took place in the participants’ respective classrooms. Even though the interview was designed to last approximately ninety minutes, each participant was given unlimited time to reflect, reconstruct, or make meaning of their past lived experiences in proper context (Seidman, 2009).

All teacher interviews were audio recorded and transcribed. The interviews were digitally recorded through a high-quality audio recording software program that is installed in the researcher’s laptop computer. The digital recording software program I used to record the interviews was WireTap. This program created the audio file as it was being recorded, and was automatically saved directly into my computer hard drive. Both the researcher and participant spoke normally into the USB microphones that were connected to the computer. After the interview, I transcribed the interview verbatim onto a Microsoft Word document, and saved each interview transcript file by a pseudonym created for each teacher to protect the teacher’s identity.

Participants were invited to return for a follow-up interview to either clarify responses from the initial interview or to offer additional data. The participants were also invited to
review the analysis, provide any discrepancies or errors, and validate the accuracy of the final analysis and findings from the case study research.

**Direct classroom observations**

Three high school Grade 11 U.S. History classes were observed for this case study. Data collected from the natural setting of a phenomenon tend to be most accurate (Harling, 2002; Creswell, 2003; Yin, 2009). The concept of the case study for qualitative research is typically reserved for research that is observational rather than experimental (Gerring & McDermott, 2007). Data collected from three classroom observations for this case study occurred in April and May 2013. The observations were conducted on a continuous basis for three to four consecutive days per participating classroom. Two of the U.S. History classes were scheduled in the morning (9:50 a.m. and 11:25 a.m.) and the third class observed was scheduled in the afternoon (1:30 p.m.). The three classes were identified as Honors and College Preparatory U.S. history. All three classes ran for 54 minutes. The observations were scheduled based on when the teachers were starting a new lesson unit in their respective U.S. history classes.

The problem, theoretical framework, and the central research question collectively determine the primary intent of the classroom observations (Merriam, 2009). In order for the observations to be meaningful to the research, it was imperative that the observations were conducted over several consecutive days so that the primary researcher could comprehend and interact with the daily events, routines, and activities that would naturally occur in the classroom (LeCompte & Preissle, 1993; Merriam, 2009). Observations provided concrete knowledge of the contexts that were incorporated as reference points for follow-up post-
observation conversations with the participating teacher and help to triangulate emerging themes and research findings (Merriam, 2009).

Prior to the observations, the teacher and students were informed that the sole purpose of the case study research was exploring key core concepts of learning for historical understanding and not the human subjects involved in the research case study. Neither the students nor the teachers have been identified in the case study and final report. Because of the qualitative nature of the study, the primary role of the researcher was to observe and collect data (Merriam, 2009). The researcher as observer remained unobtrusive in the classrooms. Knowing that the researcher’s presence in the classroom may have an impact on observational findings, the researcher was formally introduced to the students as the primary researcher observer and that the primary intent of the observation is to examine the actions and experiences of student learning for historical understanding.

Because the primary researcher was also the K-12 curriculum director of the history and social studies department at one of the participating high schools and the immediate supervisor to some of the teachers interviewed, the researcher assured to the participating teachers both verbally and in writing that their involvement in the research study would not have any effect or impact on their professional teacher evaluation. It was also particularly convenient that the participating teachers were not initially scheduled for formal observation and evaluation during the school year when the research study took place. Therefore, the potential for formal observations in these classrooms would have been conducted for the primary purpose of the research study and not for the district’s educator evaluation process. Because the researcher, in his professional role as school administrator in adhering to the new teacher observation and evaluation process called for frequent classroom walk-throughs or
mini-observations, has already established a regular presence in the classroom prior to the planned observations specific to the research, it was highly unlikely that the researcher’s presence would bear any significant impact in the data collected.

Because so much is occurring in the classroom simultaneously, it was nearly impossible for the researcher as observer to capture everything. The researcher developed and employed tested strategies to collect pertinent information through observation effectively (Merriam, 2009). One strategy was to design a code sheet to record instances of specific actions and behaviors. Another strategy was conducting a post-observation interview with the participating teacher to allow the researcher to obtain additional insight of the teacher’s intention and the expectations of his or her students as well as the teacher’s experience with the students and the class observed.

Human perception of the researcher as observer has been a major criticism of observations in qualitative research (Creswell, 2009). The sole purpose of the observations for this research case study was to collect non-subjective information that is observed in the classroom each day; this included the physical actions of both teacher and students during or throughout the lesson activity, direct quotations of what was said in class, and highly descriptive notes on the setting, the people, and the activities (Merriam, 2009).

**Documentary evidence**

Documentary evidence, or physical artifacts, for this qualitative research case study include curriculum unit guides, lesson plans, course handouts, grading policy, assessments or scoring rubrics, letters and memos, and completed assignments from students. Primary source documents collectively hold potential valuable sources of data in a qualitative research case
study (Yin, 1994). Data in documents can contain descriptive information, present new hypotheses and theories, and offer deeper historical understanding of the research topic (Merriam, 2009).

Unlike observations and interviews, documents are not impacted or influenced by the researcher’s presence (Merriam, 2009). Such documentary evidence can contain additional information beyond what was already collected from one-on-one interviews, classroom observations, and student focus groups (Merriam, 2009). They are also useful to corroborate and confirm evidence from other sources (Mathison, 1988; Yin, 2009). At the same time, the validity of documents must be carefully scrutinized and reviewed to avoid inaccurate data being included in the study (Tellis, 1997). To ensure its credibility and reliability, documentary evidence must be carefully selected based on two criteria: a document’s authority and relevance to learning for historical understanding (Moen, 1998).

Curriculum unit guides and lesson plans outline specific student learning objectives and expectations authorized by the state’s history and social science curriculum framework and district’s U.S. history curriculum. The researcher examined the relationship between the documents and the experiences of the teacher and students in learning for historical understanding. Documents that were used for learning for historical understanding provide valuable information such that these documents, especially created by the experienced teacher, reflect his or her perspectives, attitudes, beliefs, and views on learning for historical understanding (Merriam, 2009). Students’ writings through class activities and homework assignments, especially in instances where they are asked to reflect what they have learned, provide information about their experiences in studying and learning concepts for historical understanding.
Documents are limited in nature such that they were not created or designed for research purposes and may, therefore, provide incomplete data or information (Merriam, 2009). Documents do not present information in any particular context. Another potential problem with documents is when the researcher regards them only as secondary sources to verify or corroborate findings based on other data only to discover information that rival research findings (Merriam, 2009). The best approach to using documents was to explore, collect, and analyze the information to become informed on how core concepts of learning for historical understanding occur in practice. Documents used as part of the research collecting process to build theoretical constructs and categories are more likely to develop credible research findings rather than to verify or counter research findings (Glaser & Strauss, 1967; Merriam, 2009).

**Student focus groups**

Student focus groups provide a more informal, relaxed, and social atmosphere than one-on-one interviews (Keegan & Powney, 1987; Bers, 1989; Morgan, 1996; Marshall & Rossman, 1999), and will provide a wide range of responses pertaining to the students’ experiences, perceptions, and insights on learning for historical understanding (Pickering & Watts, 2005). The purpose of the focus group is to elicit critical information from students’ individual and common experiences and insights on learning for historical understanding regardless of their individual learning abilities and prior historical content knowledge (Morgan, 1996). Student input from the focus group discussions will explore what contextual factors or conditions can support and increase student learning for historical understanding, and will help educators and school officials determine how to further promote and support those factors to increase student learning and achievement (Greenbaum, 1988).
Focus group discussions have become increasingly utilized in qualitative research among the educational research community in recent decades. The focus group was first created by academics; however, the educational research community never embraced the methodology (Colucci, 2007). It was not until the high usage by and successes of the marketing research industry sometime in the mid-1980s when the focus group method began to take notice in the educational research community, and now it is one of the highly used methods in qualitative research in education (Krueger & Casey, in Colucci, 2007).

Focus groups provide an alternative approach to elicit answers and promote discussions that may not be gathered in a classroom observation or a semi-structured one-on-one interview. This alternative approach includes participants engaged in an activity and then are asked specific questions that allow participants to respond openly or freely and, at the same time, that is pertinent and relevant to the core topic of the study (Krueger, 1998; Colucci, 2007). Focus groups are ideal with participants who are less comfortable with direct questioning in an interview setting as well as with younger participants, who become bored after being asked a series of questions and can quickly lose attention and act out (Colucci, 2007).

The intent of having separate groups of five to six students was to engage students in a forty-five minute activity in which they will employ some of the core concepts of learning for historical understanding. The activity consisted of a series of images of major events of the Civil Rights Movement in the United States. Students must not only determine the correct chronological order of the events from the early nineteenth century to the present, but they must also identify the common theme of the major events. The researcher planned to observe the students’ reactions, conversations, and courses of action throughout the activity.
After the activity, the students would sit with the researcher for roughly thirty to forty-five minutes to share and discuss their personal and shared experiences from the activity. Open-ended questions included “What strategy or approach did you use for this activity?” “What were you thinking when you began this activity?” “What led you to using a specific strategy or approach?” “Did you have or use any prior historical content knowledge for this activity? If so, did having prior historical content knowledge provided you with more confidence in this activity?” Students would then be asked to express how they generally feel about studying and learning history, what strategies and thought processes do they often practice in order to gain historical knowledge and understanding, and what criteria did each use to build and measure their confidence during the learning process.

Students enrolled in the two participating U.S. history classes in the research case study were invited to participate in the focus group. The selection of students participating in the focus group were informed of the purpose of the focus group and the decision not the participate at any point during the focus group will be respected. The researcher then informed the students that the intent of the focus group was to capture their experience with the activity and learning to better understand the learning process that is taking place, and to listen to their stories of what occurred during the activity and the meaning they made from the lived experience (Seidman, 2009). The focus on whether or not they properly or accurately performed on the task is irrelevant; rather, the targeted focus is on the learning process in which the students underwent to carrying out the activity.

It was important for the primary researcher to effectively facilitate student focus groups by monitoring the conversations to remain meaningful and pertinent to the case study; the quality of data obtained would be a direct result of how well the moderator facilitates the
focus group interview (Marshall & Rossman, 1999; Pickering & Watts, 2005). Another major consideration was the relationship between the researcher as facilitator and the high school students who participated in the focus group, and that the presence and role of the researcher as facilitator could alter or influence the data collected from students in the focus group (Morgan, 1996). Students may suspect they are being judged or graded for their participation or for the results of their task. Students were informed prior to the participating in the focus group that their participation would bear no consequence toward their academic record. Furthermore, the researcher engaged in several educational focus groups as a participant as well as in several professional development workshops on effectively facilitating focus groups to elicit pertinent information. Similarly to the interviews, the discussion questions in the focus group would focus on students’ direct experiences in the focus group activity and the strategies they employed in that experience to learn for understanding.

With students’ consent and permission, the entire activity and group discussions would be videotaped. All recordings would be destroyed at the conclusion of the case study research project. Similarly to the participating teachers being interviewed, the students would be invited to review the analysis, provide any discrepancies or errors, and validate the accuracy of the final analysis and findings from the case study research.

**Researcher memos**

Another approach in collecting data was to document all activities and methods of collecting data. The amount of data for qualitative research can become overwhelming and the human researcher would only be able to collect and gather so much data through memorization (Saldaña, 2009). Memos can be helpful as it can remind the researcher salient
pieces of data or information upon examining or reviewing comprehensive field notes and transcriptions that were collected weeks, or even months, earlier (Groenewald, 2008). Memos help bring different pieces of data together as instances of a larger concept (Miles & Huberman, 1994). In addition to observation field notes, teacher interview and student focus group transcriptions, and documentary evidence notes, it is equally essential for the researcher to continuously self-reflect the methods for collecting and analyzing the data (Miles & Huberman, 1984; Moen, 1998). The actual recording of reflective notes during and throughout the data collection and analysis is called memoing (Groenewald, 2008).

Memos are notes written to maintain the validity and credibility of data collected from various and multiple sources (Miles & Huberman, 1984; Groenewald, 2008; Saldaña, 2009). Miles and Huberman (1994) describe memos as “one of the most useful and powerful sense-making tools at hand” (p. 72). Memos can also be supportive and useful to analyzing data for qualitative research (Miles & Huberman, 1994; Suter, 2006). Memos reveal the thought process of the researcher and can lead the researcher to form a concrete conceptual framework to answer the research question or a new theory explaining the research findings (Suter, 2006; Saldaña, 2009). Memos tend to evolve as research continues and progresses (Saldaña, 2009). Documenting the researcher’s actions also provide a paper trail for future audit (Miles & Huberman, 1984).

While there is no single correct structure or format for memoing as Groenewald (2008) suggests, all memos must be referenced and dated so that the contents can be easily identified and linked to the data source that was collected from classroom observations, interviews, focus groups, or document collection (Miles & Huberman, 1994; Groenewald,
Memos have been written on a separate Word document and have been stored on a CD-ROM.

**Qualitative data analysis**

Once the data was collected, data analysis began to take place at the same time (Merriam, 2009). Unlike quantitative data analysis, qualitative data is less linear and more iterative (Suter, 2006). In qualitative research, the collection and analysis of data is typically a simultaneous process (Merriam, 2009). The nature of qualitative research case study does not allow the researcher to easily or precisely predict the outcomes of the research or what or who to concentrate on as the final product is “shaped by the data that are collected and the analysis that accompanies the entire process” (Merriam, 2009, p. 171).

Unlike quantitative data, qualitative data are mainly words that describe and explain as well as suggesting multiple perspectives (Linacre, 1995). As a result, qualitative data can become abstract and difficult to compare with an objective lens. It is constantly evolving throughout the whole research process. The primary researcher must continually reflect and ask analytic questions to make sense out of the data collected in hopes that the process leads to answering the research question, and to ensure the accuracy and validity of the research findings (Creswell, 2003). Ongoing analysis of the data is critical to ensure that the collection of data remains focused, pertinent, and manageable to the case study (Merriam, 2009).

The process of analyzing qualitative data begins with identifying segments in the data set that are responsive to the research question (Merriam, 2009, p. 176). Data that can be interpreted without context or additional information is a major criterion for the data to be meaningful for analysis (Lincoln & Guba, 1985). The data collected must be relevant to the
study and can lead to further exploration and analysis of the data (Lincoln & Guba, 1985; Merriam, 2009). The researcher will read through the collected data to obtain a general understanding of the kinds of information that can be deduced from the data and to begin classifying the data into overarching themes or patterns in effective learning for historical understanding (Creswell, 2009). The researcher also maintained analytical memos to document the researcher’s analyses of the data collected (see Saldaña, 2009).

For this research case study, I planned and developed an analytic strategy design to guide the research (Miles & Huberman, 1994; Yin, 2009). This case study relied on the theoretical proposition by focusing attention on teachers’ and students’ lived experiences of learning for historical understanding and the conditions of the current learning environment in order for the lived experiences to occur (Yin, 2009). Research data from multiple sources were mapped, categorized, and coded (Zucker, 2009). Once multiple sources of evidence were gathered it was important to triangulate the data, or look for converging findings for multiple sources; such triangulation of multiple source of evidence corroborates the same findings and increases construct validity (Schell, 1992; Rowley, 2002; Yin, 2003; Creswell, 2009).

Miles and Huberman (1994) described three activities that are typically included in qualitative analysis: data reduction, data display, and drawing conclusions. Data reduction takes the collected data and simplifies them through coding. Data display focuses on charts, graphs, matrices, and anecdotal stories. Drawing conclusions test the validity of research findings. The main objective is to digest all of the data that has been collected, make sense of the data, and articulate what the data reveals in a credible way (Suter, 2006). It is cyclical in nature in that reduction of data, for instance, can lead to new ideas on what to display and
how, and display of data may require further reduction (Miles & Huberman, 1994). The figure on the next page summarizes this cyclical approach to analyzing qualitative data proposed by Miles and Huberman (1994) and serves as a model for quantitative research as well.

Because I anticipated large amounts of data from the interviews, observations, and documentary evidence, I was prepared to perform some data reduction, and only looked for data that was pertinent to the problem of practice. I had to incorporate the data reduction process, which was to organize and reduce or reconfigure the massive amount of data to manageable and meaningful units of data (see Miles & Huberman, 1994; Namey, Guest, Thairu, & Johnson, 2007). Miles and Huberman (1994) explained, “Data reduction refers to the process of selecting, focusing, simplifying, abstracting, and transforming the data that appear in written up field notes of transcriptions” (p. 10). I knew I had to read the interview transcripts, field notes, and focus group transcripts multiple times and looked for any keywords, themes, patterns, and ideas to help structure and organize the analysis (Namey et al., 2007). I then determined how the data would be categorized, grouped, and organized so that the results findings and conclusions can be drawn and properly verified (see Punch, 2005).

Perhaps the most effective strategy to categorizing and making sense of the collected data is through coding. Coding is a systematic process that organizes various aspects of data collected to manageable units for ongoing and future in-depth analysis (Strauss, 1987; Patton, 1990; Merriam, 2009; Saldaña, 2009). This process was used to capture salient pieces of information from the transcripts and field notes of teacher interviews, classroom observations, student focus groups, and documentary artifacts, and rearrange them into “categories that
facilitate comparison between thing in the same category and that aid in the development of theoretical concepts” (Maxwell, 2005, p. 96). Codes can be labels or tags assigned to units of meaning of information collected during the research study (Miles & Huberman, 1994). These units of information will then be categorized into topical themes pertaining to effective learning for historical understanding. The researcher will look for themes or patterns on effective practices of learning for historical understanding throughout multiple sources of data (Patton, 1990; Miles & Huberman, 1994; Maxwell, 2005).

Figure 3.1. Components of Qualitative Data Analysis Model

Coding intends to summarize or condense the data in order to make it easier to interpret it into narrative form (Saldaña, 2009). In addition to coding, the researcher shall maintain a digital as well as a hard copy inventory of the entire data set, organized and labeled so that it can be easily accessed at any time by the researcher and the researcher will remember the relevance of the data that was collected weeks or even months earlier.
(Merriam, 2009). Categories are initially defined that aligns the data to the problem of practice, the theoretical frameworks, and research questions (Strauss, 1987). As the research study progresses, additional categories may be created particularly when it reveals significant information that brings deeper understanding of the problem of practice or brings closer pertinent answers to the research questions.

Data displays take one step beyond data reduction. According to Miles and Huberman (1994), this second level of qualitative data analysis offers “an organized, compressed assembly of information that permits conclusion drawing and action” (p. 11). The display provides the researcher the opportunity to make sense of what the data collected presents and to determine the next plan of action whether it is to further analyze the data or collect more data. The researcher will also begin to identify patterns and relationships between the data collected (Namey et al., 2007).

For this qualitative research case study, the displays included data flow charts to (a) map out any frequent keywords from transcripts, behaviors observed, and supporting evidence in researcher memos; and (b) identify patterns across the data collected (Berkowitz, 1997). Displays included data matrixes to compare responses from teacher interviews and student focus groups in regards to the lived experiences of effective learning for historical understanding, and field notes from classroom observations, documentary evidence gathered, and researcher’s memos. The researcher later determined what data to display and how to display it (Miles & Huberman, 1994). Miles and Huberman (1994) also explain that the design of the displays will help structure the data-reduction process as well.
The third and final stage of analysis was conclusion drawing and verification (Miles & Huberman, 1994). This involved the researcher to step back and consider what the data means and assess its implications for the research questions (Berkowitz, 1997). Throughout the data collection process, the researcher constantly notes patterns, themes, consistencies, explanations, relationships, and propositions, but final conclusions occur once after all the data has been collected, condensed or reduced, and arranged and organized (Miles & Huberman, 1994; Berkowitz, 1997). Equally important is verifying the conclusions exhaustively and thoroughly to confirm findings through triangulation of data from varied and multiple sources and to counter rival explanations of the phenomenon (Mathison, 1988; Miles & Huberman, 1994).

**Responses to limitations and challenges of the case study**

One major challenge in any qualitative research case study is the validity and credibility of the findings from the data collected. At the same time while data was being collected and analyzed, I took steps to ensure the validity and credibility of the data and research findings (see Miles & Huberman, 1994; Suter, 2006). I found that qualitative research was far more challenging than quantitative research because of the burden to establish the credibility and validity of research data and findings (Seidman, 2006). It was challenging for me because the majority of the data collected were interviews and observed behaviors of human subjects (Yin, 2009). It was also challenging because I served as the primary instrument of data collection and analysis (see Lincoln & Guba, 1981; Merriam, 2009).
Validity and credibility

The nature of qualitative research case study presented significant subjective elements, which enabled research findings open to skepticism and challenge among the educational research community. It is for this reason that the validity and credibility of the findings are extremely important. It was also essential to collect data from multiple varied sources and triangulate the data to ensure all probable variables and conditions have been deliberately considered and tested.

Qualitative research relies on validity to ensure the accuracy of its research findings (Creswell, 2009). Therefore, it was critical and essential that varied strategies to validate the research findings were utilized in order to maintain the credibility of the overall research as well as the trust of the educational research community (Creswell, 2009; Yin, 2009). It was not enough for the primary researcher to assert any findings or claims based on data collected from a single source. This final report presented significant research findings that have been supported or proven through multiple varied sources, including the literature reviewed, checked and verified by research subjects or members, and has been countered by rival explanations but is reaffirmed through additional data that continue to support and confirm the initial research findings (Creswell, 2009).

Because this qualitative case study research planned to involve a variety of data collection activities through semi-structured teacher interviews, direct classroom observations, student focus groups, gathering documentary evidence, and researcher memos, the researcher must triangulate the data in order to validate the research findings (Mathison, 1988). Having multiple methods for collecting varied sources data helped me confirm the
validity of research findings (Mathison, 1988; Yin, 2009). One of the resulting benefits of triangulating multiple sources of data was eliminating any form of bias and countering plausible doubts or rival explanations of the research findings (Mathison, 1988; Maxwell, 2005).

The interviews and post-observation discussions were conducted for the sole interest of the qualitative case study research, and the data collected from the interviews and observations solely reflected the expressed opinions and views of the participants and not of the researcher. The researcher developed an interview protocol that was informed by the research questions and the literature. Thorough cross-referencing of transcripts from teacher interviews and student focus group discussions was a crucial step toward validating the research findings. All research subjects or members were invited to review the research findings based on their interviews or discussions in the focus group and were given the opportunity to comment and clarify statements to confirm or challenge the researcher’s final interpretation and analysis, and were incorporated in the final report of the study. Member checking helps the researcher to verify the accuracy of the data, confirm the interpretation of the data, and present preliminary findings based on the data (see Lincoln & Guba, 1981; Moen, 1998).

In addition to member checking, selected informed readers were invited to review the findings and analysis and they also had an opportunity to share professional expertise and insights on the problem of educational practice presented in the case study. The readers were asked to check for accuracy of the researcher’s interpretations and biases of the data interpretation and analysis, and were encouraged to challenge the researcher through thorough interrogation of the method or process of collecting and analyzing the data (Creswell, 2009).
Another approach to ensure the validity and credibility of data was maintaining a database or inventory of data collection and analysis activities documenting the sources of data, how data was collected, organized or managed, and analyzed or coded. This enabled external reviewers to carefully examine the data collection and analysis process, and to account for how research was carried out (Moen, 1998).

**Relationships between participants and primary researcher**

Because the primary researcher has established strong professional relationships with the teachers and students participating in this case study, rivals and skeptics of this research study will undoubtedly question the validity and reliability of the data collected and the interpretations and analyses of the research study. As the primary researcher of the case study, I made efforts to disclose and inform all participating teachers and students that their primary role would provide invaluable data toward the research on how high school students developed deep understanding of the historical past in U.S. history classes. No evaluation of any form or kind against both the teacher and students were incorporated from the research case study; the heart of the problem of practice and research questions was simply to explore and examine the external environmental conditions that fostered historical understanding in U.S. history classes. This research case study primarily focused on contextual conditions that may had an impact on effective student learning for historical understanding in the classroom, and how student incorporated the core concepts of learning for historical understanding despite contextual challenges.

Because I was some of the participating teachers’ supervisor and primary evaluator in one of the high schools participating in this study, the teachers were assured that the
responses in the semi-structured interviews were solely for the purpose of the case study, and their responses would not be used in the school district’s formal teacher observation and evaluation process. The teachers were also informed that they did not have to answer any questions if they felt uncomfortable in answering. The participating teachers for this qualitative research case study are not scheduled for formal observation and evaluation during the 2012/2013 school year. The informed consent also disclosed that should any teacher or student revealed an incident or issue pertaining to abuse or bullying within or outside the school premises, I as the primary evaluator have the professional responsibility and legal obligation to inform appropriate school officials to conduct an investigation on the said incident.

I currently serve as the K-12 director of history and social studies for a suburban school district located south of Boston, Massachusetts since 2007. My classroom teaching experience included teaching middle school United States history for nearly nine years. I then requested to teach at the high school and taught Modern World History and U.S. Government and Law from 2001 to 2006. By 2003, I completed two Masters degrees program in curriculum development with a concentration in history and social sciences. Between 2001 and 2006, I also served as project director for several education grants through the U.S. and Massachusetts departments of education, which focused primarily on developing project-based units, which incorporated the core concepts of historical understanding. My combined professional teaching and administration experience of 20 years in several public school districts across eastern Massachusetts has given me a personal perspective on how students today developed deep understanding of the historical past.
As the primary instrument for data collection, it was imperative that my ego had to be checked at all times throughout the research collection and analysis processes. I constantly checked for any first-hand judgment and bias through my personal experiences as a U.S. history classroom teacher and as a K-12 history and social studies director, and made sure that it would not create bias in the final findings of this case study; as Seidman (2006) wrote, “All too often the only interests served are those of the researcher’s personal advancement” (p. 13). The purpose for qualitative case study research was to primarily gain greater understanding of the problem of practice. A helpful approach that kept me in check was maintaining a memo or journal of all activities of data collection in order to maintain the objectivity of the entire research process. This memoing process checked for any personal assumptions, prejudices, and insights in the collection and analysis of the research data.

**Protection of human subjects**

This research case study did not present any physical or emotional risks to the participants. The participants were to provide pertinent data to further investigate the problem of practice; the data also helped to find answers to the research questions of this case study. No experimentations were conducted during the data collection process. All participants have remained anonymous and shall remain confidential. The final report of the case study does not offer any identifiable information. All names identified in the recordings of the interviews and focus group activities have been masked or hidden. All participants were identified by pseudonym. Only I, as the primary data collector, have access to such data. The participants have been informed of their data security and protection prior to agreeing to participate in the case study.
Digital recordings have been archived on a CD-ROM and stored in my files at home. I plan to destroy all records, print and digital, within three months of the study’s completion. All written communications were conducted through personal e-mails and/or letters, for school e-mail is considered public records that can be collected and read by legal counsel at any given time. Only authorized faculty and personnel of the Northeastern University College of Professional Studies shall have privileged access to all records to ensure the proper conduct and use of the data for this qualitative research case study.

**Conclusion**

I attended a pre-released screening of Steven Spielberg’s *Lincoln* and I happened to sit next to three high school students, who were able to obtain tickets to a sold-out showing. Even before the film started, these students appeared to be very excited to watching the movie. They were not required nor were they assigned to watch the movie; they simply wanted to watch the movie. When I asked the students what was it that attracted them to watch this particular historical-based film, the students replied that the trailer preview caught their interests and to learn more about President Lincoln and the Civil War. One student commented to me that it is more interesting to witness something, even if it is a dramatization of a historical event, and that watching a movie is more engaging than reading about it in a boring textbook or hearing from a dull lecture. I began to reflect upon recent historical-based films such as HBO’s *John Adams* and *Game Change*, Ben Affleck’s film on the Iranian hostage crisis, *Argo*, and Steven Spielberg’s *Lincoln*, and how these films, albeit primarily for entertainment purposes, were able to increase mass interest in studying and learning American history in recent years. It led to me ask myself what can typical high school U.S. history classes learn from these films to catch the grand interest and full attention of students
in a high school U.S. history classroom? In some ways, this research project sought for clues to better understand how high school students approach learning for historical understanding.

The intent of the qualitative case study research project was to offer school administrators and teachers recommendations on creating opportunities to enhance the study and learning of United States history that is engaging and valuable to students as they prepare to become productive adult citizens in a democratic society in the twenty-first century. This project looked to increase the acknowledgement of school administrators, school committees, elected officials, and community and business leaders, that a high-quality history education in our public schools lays the groundwork for producing active and productive adult citizens. Another primary goal is to introduce how to integrate the core concepts of historical understanding in the U.S. history curriculum in schools of education, teacher professional development, and the impact that a comprehensive U.S. history curriculum have in improving student learning overall in high schools across the nation. The appreciation and support of history as a viable and important subject area in the curriculum is not only a priority to the U.S. public education system, but also of great national interest.
Chapter IV: Results of the Research Data

Introduction

Chapter four presents the results from the research data gathered for this qualitative case study. The fundamental goal of collecting research data and the subsequent data analysis was to identify what learning for historical understanding looked like in these U.S. History classrooms in two U.S. public high schools. The data collection process included semi-structured teacher interviews and classroom observations in U.S. History classrooms in two suburban public high schools located outside Boston, Massachusetts.

Throughout the data collection process, I kept written research memos and notes in a log to capture the evolution of my thinking and analysis, to maintain transparency of the research, and to have an audit trail of my study. Entries of the memos can be found in Appendix I. Participants were provided with the results of the study and have had the opportunity to respond. Participants were invited to strike and/or to clarify their contributions to the study or share additional information for the final report.

Data collection

Teacher interviews. Four high school teachers were interviewed to share their lived experiences and observations both as learners and teachers of U.S. History. The central focus of the semi-structured interviews was to gather personal insights from U.S. History teachers about how they recognize effective student learning for historical understanding in their U.S. History classes. The interviews were intended to gain a better understanding of what high school U.S. History teachers observed about how today’s high school students approach their
learning for historical understanding and what occurred when high school students have
developed historical understanding in their U.S. History classes.

Below is a table detailing the demographic information of the four U.S. History
teachers from two Massachusetts public high schools who were interviewed for this case
study. The participants’ names have been changed to protect their identities.

Table 4.1

Demographic of interview participants

<table>
<thead>
<tr>
<th>Interviewee</th>
<th>Gender</th>
<th>Age</th>
<th>Years teaching high school</th>
<th>Years teaching U.S. history</th>
</tr>
</thead>
<tbody>
<tr>
<td>George</td>
<td>M</td>
<td>Late 30s</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>Brian</td>
<td>M</td>
<td>Early 30s</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Anne</td>
<td>F</td>
<td>Mid 30s</td>
<td>14</td>
<td>10</td>
</tr>
<tr>
<td>Stephen</td>
<td>M</td>
<td>Mid 40s</td>
<td>16</td>
<td>16</td>
</tr>
</tbody>
</table>

The semi-structured interview format was restructured to accommodate teachers’
schedule and time. The interviews were conducted after school and lasted for roughly 90
minutes. The general format of the interview was loosely based from Dolbeare and Schuman
(see Schuman, 1982), but rather than having three separate interview sessions, I consolidated
it into one session with three half-hour segments. The first of three segments focused on the
teachers’ early life experiences in learning U.S. history as students; I asked them to reflect on
encounters, events, and situations that captured their interest in U.S. History, and also how
they decided to become a U.S. history teacher. The second segment of the interview
concentrated on their lived experiences as a U.S. History teacher. The interviewees were
asked about their memories of their early years teaching U.S. History and describe some of
their best as well as their most frustrating moments in the classroom. The third and final
segment of the interview allowed the teachers to reflect and make meaning of their lived experiences and observations, and how these experiences and observations have shaped their general perceptions, insights, and ideas about how high school students today have developed a deep understanding of the historical past in their U.S. History classes.

The four teachers who were interviewed for this case study each recalled positive memories of learning and teaching U.S. History. The teachers smiled and sometimes laughed as each reflected back and responded to the questions asked throughout the interview. At the conclusion of one interview, Anne, a veteran teacher of fourteen years, remarked, “I am so glad we had this interview. It really made me think about myself as a U.S. History teacher, which I have not done so in a long time and should do more often!”

**Classroom observations.** For this case study, I was able to observe three U.S. history classrooms from Washington High School. George and Brian, who were also interviewed for this case study, each taught one of the three classrooms I observed. Robert, who was unable to meet for an interview but invited me to come and observe his Honors U.S. history class, taught the third U.S. history class.

Three high school Grade 11 U.S. History classes were observed for this case study. Figure 4.1 shows Washington High School’s course description for the U.S. History II course in the high school’s program of studies:
U.S. HISTORY (Grade 11)

This course is required for graduation and conforms to the outline provided by the Massachusetts History and Social Science Framework. Students in Grade 11 will study the major turning points in American History in the 20th century. After a brief review of the causes, events and results of the Civil War and Reconstruction, this course will examine the rise of Industrial America and the labor movement, immigration and the shift in population to the cities, along with the changing ethnic composition of America. Also included will be the position of the United States in a changing and hostile world of the 20th century, adjustments brought on by the Great Depression and the New Deal, the Civil Rights struggle and achievements, the Vietnam War and the changing scientific, cultural, economic, and political developments of the late 20th century. Students will have the opportunity to discuss major events and elements of the Cold War.

In addition to the treatment of all core knowledge topics, the course will begin with a featured examination of the Constitution, our governmental system of checks and balances, assorted case studies, as well as the rights and responsibilities of citizenship.

The three classes were identified as Honors and College Preparatory. Two of the U.S. History classes were scheduled in the morning (9:50 a.m. and 11:25 a.m.) and the third class observed was scheduled in the afternoon (1:30 p.m.). All three classes ran for 54 minutes. All three teachers described their students as “overall good students.” One teacher, George, commented that in past years, he felt he was “pulling teeth” to get his students motivated and engaged in class; “This year, my students have been pretty good at getting a conversation going.”
Table 4.2 on the next page details the demographic information of the three U.S. History teachers whose classes they taught were observed for this case study. The participants’ names have been changed to protect their identities.

Table 4.2

Demographic of observation participants

<table>
<thead>
<tr>
<th>Interviewee</th>
<th>Gender</th>
<th>Age</th>
<th>Years teaching high school</th>
<th>Years teaching U.S. history</th>
<th>Period observed</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brian</td>
<td>M</td>
<td>Early 30s</td>
<td>7</td>
<td>3</td>
<td>Period 3</td>
<td>College</td>
</tr>
<tr>
<td>George</td>
<td>M</td>
<td>Late 30s</td>
<td>15</td>
<td>11</td>
<td>Period 4</td>
<td>College</td>
</tr>
<tr>
<td>Robert</td>
<td>M</td>
<td>Mid 40s</td>
<td>14</td>
<td>10</td>
<td>Period 6</td>
<td>Honors</td>
</tr>
</tbody>
</table>

A fourth teacher, a female, invited me to observe her U.S. History class, but due to scheduling conflicts, we were unable to schedule classroom observations. It should be noted that the primary focus for this case study was how high school students responded to curriculum, materials, and instructional practices in their U.S. History classes and how they demonstrated learning for historical understanding and not on the gender of the course’s instructor.

At the time of the observations, two of the U.S. History classes (periods 3 and 6) were focusing on the New Deal policies and programs of the 1930s. According to the teachers, Brian and Robert, the main objectives were: (1) describe the New Deal policies and programs; (2) explain why the New Deal policies and programs were created and implemented; and (3) evaluate the consequential affect and impact of the New Deal in the United States today.
Both teachers incorporated an activity from the History Alive!® (HA) U.S. History curriculum resource kit. This curriculum resource program contains activities that place students into various situations and simulates certain experiences through simulations, role-plays, investigatory research, or debate; one of the tenets of HA was to allow students to “discover information for themselves” (Harmon, 2006; Teacher Curriculum Institute, 2013). Brian implemented the HA activity as it was originally designed in the curriculum resource kit, while Robert provided his students the contents from the HA activity to prepare for a Socratic discussion on the roles, advantages, and disadvantages of federal and state government programs and charities (by churches and independent organizations) that were responsive to the severe economic depression of the 1930s.

In both U.S. history classes, students were given the option to collaborate with a classmate or work independently. The teachers in both classes introduced the New Deal policies and programs assigned their students to read about two to three New Deal policies and programs to each group of students and encouraged them to conduct further research using their textbook and online resources. The students were also informed they will present their assigned policies and programs to the rest of the class.

Both Brian and Robert planned the activity so that their students learned the New Deal policies and programs through inquiry and research. The teachers encouraged students to ask questions and that “by asking questions creates paths to find answers,” as Brian said to his students. In his interview, Brian expressed his belief that a consistently effective learning tool for his students was to simply ask questions to seek or find the truth:
I noticed that whenever [my students] found the answer to their own question, they seem to remember it more than had I asked them the question. I think when they asked the question, they own it whether they’ve realized it or not…. In my opinion, to get deeper understanding, you have to really investigate… you have to get inside the issue; it can’t be just memorizing something. It has to be something where that, like, they don’t know what they are looking for but they have to kind of investigate and do some deep research.

As students researched and later presented the assigned New Deal policies and programs, both teachers played the roles of facilitator, fact-checker, and devil’s advocate to ensure that their presentations were based on students’ research and valid data.

In George’s period 4 U.S. History class observed, students were assigned to research and create a multimedia presentation on a selected artist from the Harlem Renaissance or the Jazz Age. The objectives in this assignment were: (1) research the life of an artist from the Jazz Age; and (2) describe how the Jazz Age reflected African American life and their struggles for equality and civil rights in the early twentieth century. After playing some selected video clips from Ken Burns’s documentary Jazz, George described how jazz music symbolized what and who we (society) are; “[Democracy] is something that is bigger than ourselves,” he explained to his students.

Students were instructed to “focus on [Jazz Age artists’] personality.” George said to his students as he introduced the research assignment, “You want to tell stories about the person because one has a better context about what they did and why they did it; who they are.” George also explained to his students that they would spend the next couple of days in
the computer lab to research and create their presentations. Students were given the opportunity to work independently or collaborate in small groups.

Students were given a handout sheet that contained the task, content guidelines, and instructions of the Jazz Age assignment, and listing of web sites to several artists during the Jazz Age. Students were assigned to a particular jazz artist to research and present. George then took the students to the school’s computer lab. He encouraged his students to conduct research freely but reminded them to verify the credibility of web sites they visited. Students also accessed YouTube and listened to some of the works of their assigned artist. As students were conducting research in the computer lab, George circulated around the area to make sure his students were on task and also provided additional guidance and support when it was warranted. For much of the class period observed, students were allowed to explore and research on their own so as long as the information they came across were pertinent to the project’s content guidelines. “Kids need that freedom to explore on their own,” George explained to me, “If [teachers] constantly tell students where they should look for information, they will never know how to look for information themselves. They need to learn which information is accurate, and which is not.”

On my next observation visit to George’s period 4 U.S. history class a few days later, the students had finished their multimedia presentations and presented their work to the rest of the U.S. History class. One group of students delivered a presentation on Langston Hughes and another group shared their research on Billie Holiday. Like Brian and Robert, George played the role of facilitator and fact-checker, and asked questions to check for students’ understanding of the topic they presented. After both students presented their assigned artists, George proceeded to probe students’ understanding of the Jazz Age by asking them what
characteristics did these two artists—Hughes and Holiday—shared, and how did these two artists became emblematic of the lives and struggles for equal rights for African Americans in the United States during the first half of the twentieth century.

**Salient results of the research data**

**Emerging key themes.** Four key themes emerged from the initial analysis of the data collected. The key themes that emerged were:

1. Positive encounters and experiences in learning U.S. History student’s level of interest and engagement to develop historical understanding.
2. High school students were more likely to practice, obtain, and demonstrate learning for historical understanding when actively engaged in some type of learning activity.
3. Expanded access to explore, research, and examine historical data and content have increased opportunities for high school students to learn and develop a deep understanding of the historical past.
4. Teacher preparation through quality professional development and curriculum planning was an essential component to create opportunities for student learning for historical understanding in the U.S. History classroom.

**Theme 1: Positive encounters and experiences in learning U.S. History student’s level of interest and engagement to develop historical understanding**

The first theme emerged from the four semi-structured teacher interviews. When the teachers were asked about how they became interested in U.S. History, each described a personal experience or observation early in their childhood that caught his or her curiosity, interest, or fascination about him or herself as a member citizen of the United States or the
world. The teachers interviewed have collectively fostered a heightened degree of curiosity, interest, and fascination to learning for historical understanding. They each described some form of childhood experience—whether it was being exposed to U.S. history by an individual, or learning experience in a U.S. history class in junior high or high school, or visiting an historic site or museum—that immediately grabbed their interests in U.S. history and become fascinated with the subject from that point on in their lives. George talked about visiting historical sites and watching reenactments of battles in Lexington and Concord:

I can remember…when I was four or five, going to several reenactments of battles in Lexington and Concord, and my father and mother sort of explaining those things to me and I just immediately becoming very interested in what was going on.

Brian did not recall a specific moment but commented about his overall fascination in learning about the past. He also credited his upbringing in New England, where history is everywhere:

I was just always obsessed with learning about history, going to places whether it be something local, in my community, or just taking out a library book on my own. I remember doing a report about the moon landing and having to research that and…it was like, I can’t believe this stuff happened…and my parents were alive [when it happened]! It’s kind of all around you…. Thanksgiving would come around, and we live around where these events happened….
There was at least one adult figure from their respective childhoods, either a history teacher or family member, who was regarded as a major influence to them on learning and eventually teaching U.S. History. Stephen talked about listening to stories from his father, “Probably comes from my father…. His father was involved in politics; briefly he ran for state representative…. He always had stories about Jack Kennedy, and going to see him speak…his father brought him down to Washington to the funeral. The way he described everything was in human terms so he made it personal, which made it more interesting.”

George also credited his parents for having a deep interest in U.S. history. “My parents very much wanted me to sort of have a very good understanding of the nature of what goes on… and sort of the founding of the nation,” George recalled, “I remember them reading stories to me and I think some of the first few books I learned how to read were actually about the American Revolution. My parents exposed to museums and historic sites; that’s where it all started.” Anne talked about her father and grandfather as being great storytellers, which got her interested in U.S. History early in life. “[My dad] would talk about it and I would just pick it up from him or listening to my grandpa telling stories. I always liked family history and that sort of thing, so I just developed my love of history from there.”

In addition to family members, peers played an instrumental role in Anne’s life as a student. “I remember in particular fifth grade…having a contest with a kid who sat next to me to get the highest grade on the U.S. History test… I would study really hard just to beat him.” Stephen credited his friend, who also became a high school teacher after graduating from college and talked him into teaching. “[My friend] was telling me how he was having a great time, and he was doing what he loved what he was doing, and it really just hit me one day. I literally woke up and decided that’s what I want to do.” When asked if he knew what subject
he would teach, Stephen replied, “I don’t think there was much debate. Do I want to teach math or… History just seemed natural.”

George talked about his teachers as having a huge impact on him on loving to learn history:

I had teachers who made the subject come alive. For me, I was already interested in history so it wasn’t really a hard sell… but there are [teachers] who I think I connected with personally, and so that sort of helped me to… not only develop a relationship with them but also sort of have a connection with the material that I may not have had.

Another attribute to this theme was how the teachers were able to make meaningful connections between the historical past and their personal lives or an event or situation that was happening in their lifetime. In the interviews, the teachers talked about how their interest and fascination to studying and learning history greatly increased whenever they discovered some sort of personal connection between what they were learning and what was going on in the world around them. Stephen described the times when he was growing up and how the world around him prompted him to learn history in order to gain a better understanding of why significant world events and problems existed. “The Cold War seemed to kind of heating up again in the early eighties… just when I was turning 10, 11, 12, 13,” Stephen recalled, “and then starting to study U.S. history… I think that kind of forced us all to grow up thinking that we could get nuked at anytime, so it kind of forced our interest in it.” Brian described how while in high school he was researching the landing of the moon and knowing that his
parents were alive when it happened. “That’s really when [history] starts to become really interesting,” he commented.

Each of the teachers described how the human element was a major influence in their fascination with history in general. When was asked about what made history so interesting, they talked about how major historical events have impacted human actions and behaviors as well as the interactions between groups of people. “I always liked the relationships between people,” Anne commented. “I like the individual stories, the biographical stories… I always found that interesting.” She also talked about women in history and how some American women did something that changed the course of history. Brian talked about the relationships between ethnic groups and issue of race, “I remember being in high school and did not get the exposure to some of the diversity of American history learning; about Native American tribes, or immigrant groups, or women. It was very much, like, you had to be a white guy to get talked about,” he said.

“I think for me, empathy is the big one,” Stephen said. “I think that’s what made it interesting for me; learning about it as a kid that these events were real, and that these are real people. I’m 44 now, so I’m older than John F. Kennedy when he was elected president; and James Madison was in his thirties when he wrote the Constitution. That’s pretty impressive.” He went on to say in the interview that history should be presented and delivered in human terms and that he wanted his students to understand or realize the situations or the positions that peoples in the past were placed causing them to decide or act on things that had occurred. “The human element. That’s always the angle I try to go after. Because once you can identify with it, then it becomes interesting. How can it not?”
Not all experiences were positive, however. Stephen described his high school history teachers as neither outstanding nor memorable; “To be honest, I cannot remember my high school U.S. History teacher. I can’t remember who he was. [His name] may come back to me,” Stephen commented in the interview, but did remember his freshman world history teacher, who he remembered as dry and boring:

He gave you the notes and then just sort of read it all at you… but there was without any passion whatsoever; there was no explanation, there was no stuff to clarify. It was just regurgitation... just a monotonous lecture, no questioning. Nothing.

Stephen later remarked how this negative experience helped him in knowing how not to teach.

Three of the four teachers interviewed did not think about teaching history while in college. George worked for the National Park Service shortly after graduating from college. Both Brian and Stephen graduated with a Liberal Arts degree in either business or marketing, and later became U.S. history teachers. However, all expressed the desire, particularly upon deciding to become a teacher, to teach history because the subject had always interested or fascinated them since childhood.

**Theme 2: High school students were more likely to practice, obtain, and demonstrate learning for historical understanding when actively engaged in some type of learning activity.**

Active learning often involves student participation or interaction in their learning (Bransford, Brown, & Cocking, 2000). Students are challenged to use their mental abilities
while learning (Stern & Huber, 1997). Each of the teachers in the case study designed and planned instruction in their U.S. history classes that prompted and encouraged students to engage with the content and materials through inquiry and experience. In nearly every instance throughout the data gathering for this case study, the teachers described particular moments when their students exhibited signs of having reached deep understanding of the past in class, whether it was in a small group discussion, during an activity, or working on a task independently. In the interview, Brian remarked, “When [my students] do something that gets them engaged… they don’t realize they are starting to examine stuff; they become part of the [learning] process and they see relevancy; why [learning history] matters to their world.”

The teachers interviewed reported planning activities and tasks that incorporated the core concepts of historical understanding as defined by Stoskopf and Bermudez (2008) and Seixas (1996). In the interviews, the teachers each described how they planned activities that encouraged students to examine and analyze primary and secondary sources (evidence), investigate factors that influenced why and how events and decisions were made (causality), make connections between past and present (continuity and change), explore motivating factors that have resulted to actions and events (agency), and reflect on the past to make sense of the present and forecast the future (significance).

**Student-centered activities.** In the interviews, the teachers expressed that learning through experience was an effective strategy for students to develop historical understanding. The teachers noticed how students were more likely to develop an understanding of the past whenever they were actively engaged in some learning-centered activity. George remarked, “I found it to be usually when we’re doing mock trials, or… simulations of some kind. Even though it tends to require more work, and they say this over and over again, they tend to be
able to have emotional as well as intellectual connections to what was going on.” He continued on to say, “I think it’s those activities that tend to stick with kids and seem to have the most meaning.”

“One of my favorites is the rock-paper-scissor lesson… on Communism. It’s just so good,” Stephen remarked. In this hands-on HA activity, students were provided with two or three tokens, often in the form of candy thus raising the incentive to participate, and they play a round of rock-paper-scissors. The student who lost the round had to hand over his or her token to the winner, and students who gave away all of their tokens were then taken out of the game and sat down. Playing the game under Communism, however, the teacher would take a student’s excessive winnings away and redistributes the tokens to other students, particularly to those who had given all of their tokens away. According to Stephen, students who found themselves having their tokens, or in this case candy, taken away and redistributed by the teacher began to complain. “The activity, the game, is kind of the hook… but I think they get the concept of Communism, what Marx wanted or predicted; then it becomes, like, you see the light bulb warm up,” Stephen said.

George’s fifteen-minute lecture on the roots of Jazz, for instance, was interactive and engaging. The lecture was a combination of interactive discussion, physical activity, and using technology to learn through sight and sound. George deliberately avoided straight, teacher-led lecture, and instead invited and encouraged his students to take part in the conversation about the roots of Jazz music. He started by asking students what emotions do they feel when they hear certain types of present-day music, and then segued to the emotions that inspired Jazz, and how Jazz created emotions among the African American community. George went onto YouTube and played selected musical works of notable professional
ragtime and jazz artists such as Jelly Roll Morton and Scott Joplin, and showed selected scenes from Ken Burns’s *Jazz* documentary.

Another particular moment occurred in Robert’s period 6 U.S. history class, when students were engaged in a spirited round table discussion over the federal government’s role in implementing and enforcing the New Deal policies and programs of the 1930s. What caught my attention was how these students applied their knowledge to discuss whether or not the federal government had overreached its power, and if the federal government’s involvement in the New Deal programs was necessary or unconstitutional. The students not only cited specific New Deal projects or critical responses from opponents of the New Deal of that time period to argue for or against the federal government’s involvement, but they also incorporated present-day examples and issues to clarify or validate their position. Students made references to the present-day debates over reforming entitlements and taxation, and passing legislation to address a weakened national economy and unemployment. It was a moment that reminded me of what the teachers who were interviewed in this case study described; which was when and how they observed their students attain historical understanding of a particular topic in U.S. history.

**Investigating historical evidence.** All of the teachers who were interviewed described a situation in the classroom where their students employed certain strategies and techniques to explore and investigate, and then applied their newfound knowledge to develop a claim or thesis and cite evidence to support it. Brian described planning a unit in which students examined several primary documents from the Immigration Restriction League to investigate multiple theories on why Americans were advocating reasons to restrict immigration to the United States: “To get deeper understanding, [students] have to really
investigate… [students] have to get inside the issue, it can’t be just memorizing something… they have to kind of investigate and do some deep research.”

Anne also talked about using primary source materials in her U.S. history lessons. In the interview she described using the carousel method in which she posted several primary documents were posted around the classroom. She then assigned a group of students to one of the posted documents to examine. Students were also given a graphic organizer or document analysis worksheet to record their observations. The students in their groups would spend a couple of minutes analyzing and discussing what they have examined. Then the groups rotated to the next primary document. The carousel activity, Anne explained, got students out of their seats and at the same time to engage with the content and each other. “I think anything that requires [students] to read a document promotes the deeper understanding of history,” she later remarked in the interview.

**Historical perspectives and points-of-view.** All of the teachers who participated in the case study mentioned the importance of acknowledging multiple perspectives and points of view in U.S. history. The teachers interviewed described a moment in which students assumed a role of a historical figure and simulated the mindset and attitudes of that person at that place and moment in time. “We stress the word empathy a lot,” Stephen said in the interview. He later talked about how he would place his students into some situation that forced them to make a decision; “You’re President Johnson [confronted with Mississippi in 1964]. You have this advisor saying this, this advisor saying that. Which one do you decide and why?” He then encouraged his students to explore the differing views, analyze and evaluate each position, and determine the appropriate course of action.
In their respective interviews, Brian and George talked about their students would develop an understanding of topics and issues in U.S. history by assuming roles of historical characters who have lived in the past. George described a lesson activity where his students assumed characters back in time to discuss the matter of immigration to the United States in the nineteenth century; “They [used] historically accurate period-correct language that today would be highly offensive… and usually students aren’t willing to throw themselves into acting and learning as much,” George said. He continued on to describe how shocked his students were to realize how offensive the rhetoric and tone was, but his students began to “see and understood the issues at hand and how these moral and ethical things these folks were dealing with and in some respects are stuff we are dealing with today.”

Brain talked about how his students would get into character when exploring social and economic implications of industrialization in the United States; “[My students] were playing certain characters and arguing things based on the character… like Ida Tarbell just laying it into John D. Rockefeller, or having Mother Jones yelling at Andrew Carnegie about the mistreatment of his workers,” Brian described, “there was deep understanding; there were deep exploration of the issues. It was great to see.”

Making personal connections with the historical past. Having students make personal connections and identify with historical figures in U.S. history was a common emerging theme in the interviews with teachers. Some teachers also talked about how historical content must be presented in which students can make some relevant or personal connections or meaning to the topic. Historical understanding can be seen as a cognitive process of making sense of the student’s new experience in relation to the already constructed knowledge (Harmon, 2006).
For instance, in the interview, Stephen remarked, “Asking questions that make it personal to them… have a human element… I think makes it more interesting for them; something they can identify with.” Brian commented in his interview, “If kids can sort of make emotional connections to historical figures, first of all they become more real.” He continued on to say that making such a connection would offer guidance and inspiration to struggling students on overcoming personal challenges and preparing for the world of work.

There were times when a student or the teacher made parallels with historical events and topics that were addressed and learned in class. In all three U.S. History classes observed, the teachers allotted the first five minutes of class to engage their students to share and discuss events and issues of the present day and to explore its significance and relevance to their lives. The objective of this practice, according to the teachers, was to allow students to recognize and appreciate the decisions and actions of individuals or group of individuals that can impact others directly and indirectly. “I want my students to know that this has often been the case throughout history,” George commented.

There was no coincidence, in one instance, for George to make reference to the Triangle Shirtwaist Factory fire in New York City in 1911 when discussing the recent clothing factory collapse in Bangladesh. In another class observed, Brian made reference to critics’ arguments against President Franklin D. Roosevelt’s New Deal programs when discussing the ongoing present-day debate in the U.S. Congress over proposed cuts to entitlement programs such as Social Security and Medicare. “To better understand the debate that’s happening today, we need to know its history—from the moment of conception. It’s just amazing how this debate has carried on since the 1930s,” Brian remarked to his students.
“Sometimes, current news event does not necessarily tie directly to [the topic] we are studying in class,” George commented; “It’s just getting students to be well informed of what’s going on in our country or in the world. It’s about thinking critically.” He further claimed that allowing students to learn about current events increases students’ ability to think critically when studying learning history in general.

In a conversation shortly after his class was observed, Brian described how he made it a goal to have his students see relevancy of the past and why it matters today, and once his students saw the relevancy and why it matters in the modern world, their indifferent attitude seemed to fade away. “[My students] are doing something and not just sitting there and having something said to them… they are part of the process…. and they are engaged… they care about it, and see why it matters,” Brian commented.

**Opportunities to reflect on learning.** What follows the activity is the reflection and discussion, where students deliberated and debated on the good and bad of both Communism and capitalism. “Once [students got] the concept of Communism, what Marx wanted or predicted, you see light bulb [turned on above their heads],” Stephen described. “I try to have them write about [what they have learned],” Stephen said in the interview, “[my students] look excited…when they make a connection to another unit that we studied. You know that’s when they know; when they make connections…and they know they got it.” George stated a similar comment; “I have seen a bunch of different moments when you almost can see the light bulb turn on. It usually happens… as a result of activities and in a debrief; we’d be talking about it.”
Brian regarded this stage of the lesson where students can begin to make sense or meaning of what they have learned and when the student’s knowledge and understanding of history is retained. “I try to get students to be like, well, now you know this, so what? How are you going to take this and apply it to the modern world?” Brian mentioned in the interview, “when you see kids doing that, furring their brow, and thinking about it, that’s when you know you’re on to something.”

**Balanced approach.** It should be noted that active learning does not only occur in activities where students are constantly collaborating in groups, role-playing, participating in simulations, or moving around the classroom; active learning can occur through lectures, reading texts, and research so as long as the student is engaged with the content and their learning (Stern & Huber, 1997). One teacher, Stephen, defended teacher-led lecture and discussion; sometimes, he asserted, it is necessary to deliver historical background to provide students proper context as to why and how certain historical events have occurred. “I think the whole teaching of the balanced approach is good,” Stephen commented, “active learning through collaboration, using technology… but we also need time for [traditional instruction]; straight lecture, general discussion… and teaching skills in reading and writing.”

**Theme 3: Expanded access to explore, research, and examine historical data and content have increased opportunities for high school students to learn and develop a deep understanding of the historical past**

**The U.S. history textbook.** In the interviews and observations for this case study, the presence and use of the U.S. history textbook was considered merely as one of many tools used for learning for historical understanding. In the classes observed, the U.S. history
textbook was neither mentioned nor used. All of the participant teachers mentioned that the U.S. history textbooks are useful by providing historical content background and that the textbook is best used as a springboard for students to delve into complex and challenging concepts and themes in U.S. history. “[The textbook] is rather a convenient tool that packs a lot of information into a pretty small space, a digestible space,” Stephen commented.

Both George and Brian liked their U.S. history textbook and described how the textbook was well organized and written. “What I do like about [the textbook we use in class] is it’s generally well written. I think compared to what I was looking at in the 1980s and the early 1990s it’s… it’s a far cry from that,” Brian commented. Brian also liked about how the textbook placed students to imagine or stand in the shoes of a historical figure and instructs them write a personal letter or editorial that ties in directly with what they just read or learned, “I love assigning those to them because again I think the more they can sort of put themselves in the shoes of people of the past the more all of this make sense to them.”

Anne did not like the U.S. history textbook used for her U.S. history classes; “I’m just not a fan of the textbook [we currently use], and there are mistakes in it… and it seems biased, and there are just some chapters I won’t even use for it and I end up doing my own thing, because [the textbook is] so distracting, so yeah, I’m not a fan of the textbook at all.”

None of the teachers regarded the textbook as the sole primary tool for learning, as Stephen commented, “I’m sure some people had those kinds of teachers [who say] ‘Go ahead and turn to page such-and-such and start reading and then answer questions at the end….’ but I would never, ever consider that. That would drive me nuts. Just sit there and watch them read and then answer the questions.” George preferred to incorporate readings that were
equivalent of undergraduate-level readings and primary sources such as newspaper articles, photographs, and written letters, rather than relying on the U.S. history textbook as the authoritative source of history content.

Even though the majority of the teachers have found the U.S. history textbooks helpful in presenting their students historical background content knowledge in small doses or chunks that are reasonably manageable for basic historical comprehension, they preferred that their students spend the time in the classroom sharing, analyzing, and discussing or debating the topics with one another. The teachers felt that the U.S. history textbook, or any history textbook for that matter, should not be looked upon or regarded as the authoritative source of what happened, how it happened, and why it happened. All teachers agree that history textbooks, in general, typically present one view—often that of an old white American male—and, as one teacher commented in his interview, the textbooks “perpetuate the notion that U.S. history is stale, static, decided upon history.” Rather, they felt the U.S. history textbook should only be used to help construct a historical context of a situation, issue, or event, and allow students to draw their own interpretation as to why and how something occurred the way it did, or why and how decisions and actions by certain individuals were made.

Engaging curriculum resource materials. In any given U.S. history classrooms, resource materials are readily available to support high school students to learn topics and concepts in U.S. history in meaningful ways. In the three U.S. history classrooms observed for this case study, the classroom walls had visually appealing posters and maps that displayed and presented history content information. The teachers were armed with a variety
of curriculum resource materials to use in order to engage their students including supplemental resources and interactive web sites and online activities.

**Accessing U.S. history content.** Unlike the U.S. history textbooks, the Internet has allowed opportunities for students to engage with history content. For instance, in George’s period 4 U.S. History class, students spent a couple of days in the computer lab to create their multimedia presentation on the Harlem Renaissance or Jazz Age. In our post-observation conference, George remarked, “It’s nice that students can access [YouTube]…. Having students to be able to listen to the music from that time period, I think it enhances students’ understanding of why the Jazz Age was an important time in American history. The textbook can’t do that.”

The Internet and the web have enabled high school students the ability to increase, and expand their knowledge base of U.S. history and develop a deep understanding the past. However, like U.S. history textbooks, there are still no guarantees that history content information were always accurate. In fact, students are more likely to come across completely inaccurate or biased historical content information online than what has been printed and published in history textbooks, creating a false sense of confidence in identifying trustworthy and credible sources in the learning process (Lorenzen, 2001).

Furthermore, Stephen noted that the constant introduction of new historical evidences and the rise of historical research being published have further complicated the American historical narrative:

> It can get complicated. The world is complicated. Our government is complicated…. I don’t want to say there’s too much information out there,
but there’s a lot more. A lot more information available than when we were their age.

But all of the teachers agreed that multimedia and online technology including social media such as Facebook, YouTube, and Twitter, have expanded learning opportunities to develop and reach historical understanding. In one of the high schools participating in the case study, websites such as YouTube, Facebook, and Twitter are blocked from access. Some teachers expressed frustration about not having access in the classroom as these sites contain really good information to initiate or stimulate in-depth conversations in their U.S. history classes, but also conceded by stating they understood the potential dangers of allowing students access to sites that contain objectionable or inappropriate materials.

In one of our post-observation conversations, George described the pedagogical objective to have students build and practice skills in using technology, as they were expected to master as they enter the workforce in the twenty-first century. He explained to his students in class, “Originally, I was going to have you create a poster. But when you go out into the world of work… really, who creates posters anymore? More likely than not, you’re going to use some type of media with your presentation, so I’ve modified this project where you will create and design a PowerPoint presentation.” Brian also talked about preparing his students to build skills for college and work; “I stopped making them do posters… let’s do PowerPoint instead; let’s do presentations; let’s do more performance-based assessments.”

All of the teachers interviewed for this case study reported discouraging their students to cite, let alone even visit, Wikipedia simply due to its open source community concept in which anyone can contribute information to the site with little to no moderation. Only
recently did one teacher concede that he began allowing students to use Wikipedia but as “a starting point” for preliminary research only and cite from the actual sources where the information was taken:

I used to prohibit [Wikipedia] but now I’m like go ahead. [Wikipedia has] come a long way; there are footnotes, check the source. I wouldn’t allow them to use the site as a source, or cite it as a source, but for basic research and then locate the source… fine.

Stephen raised concerns how the instant gratification of finding historical information through Google or the Internet has enabled a false sense of learning for historical understanding, and how it can result to greater frustration among students. He also cautioned that students must realize that learning takes time.

I think on their end they live in an instant gratification constant connection to technology world, and sometimes getting into the issues and to understand them, they’re complex, their layered, their nuances; that sometimes take time, sometimes that takes getting things wrong, or I don’t understand it, or read that passage again, having to look up… you know, sometimes I think those challenges can happen that kind of make it tougher for kids, it take a lot of effort to get real history learning.

One research study revealed that high school students who have been conditioned in accepting content information from their teachers and from textbooks experience difficulty in determining the authenticity of information from web sites and evaluating the credibility of web sites (Lorenzen, 2001). Anne addressed the issue of not teaching students basic skills to
use technology properly to learn for historical understanding; “I don’t think we… teach them [how to use technology properly and effectively],” she commented. “They’re so used to not thinking about what they find; they just Google something [to find information]. They don’t understand that they need to read as much as look for it and think for themselves.” She went on in her interview to describe general observations of her high school students experiencing difficulty in articulating thoughts in their own words and more likely to plagiarize.

Despite the challenges, Anne felt that incorporating technology in her lessons overall has increased her students’ interest in U.S. history, “I think for the kids who don’t naturally like U.S. history, I think [their learning experience has improved] for them.” One of the advantages of incorporating technology in U.S. history was the increased accessibility of detailed content available for research. “I think content is much more detailed now than when I was in school,” remarked one teacher. “I think there are more people represented in history, so maybe that’s what makes content more detailed.” Another advantage was the visual appeal of history content information. Students tend to visit and pay more attention to web sites that contain pictures (Kafai & Bates, 1997, in Lorezen, 2001).

Theme 4: Teacher preparation through quality professional development and curriculum planning was an essential component to create opportunities for student learning for historical understanding in the U.S. History classroom

Teacher training practicum experiences. In the interviews, the teachers were asked to describe their teacher training in their undergraduate or graduate years in college; all of them have claimed their teacher training experiences helped them learn how to plan and deliver instructional practices that fostered and enabled effective student learning for
historical understanding in the classroom. In the interviews, the teachers reported a negative view toward undergraduate teacher training programs in college. “As an undergraduate [student], I had a few education courses and I actually disliked them tremendously,” George commented in the interview. Anne described how she was assigned to write lesson plans but had never been introduced nor taught how to write one: “[The professor] completely tore it apart, and I was like, you didn’t teach me how to write a lesson plan; I don’t understand what you are looking for, and I really felt that nobody really taught me about lesson planning.” Stephen described his introductory education foundations course as basically a bull session; “Every class, it wasn’t really going anywhere. We didn’t really have to do anything, and I walked out of there with an A… maybe A minus, but how did I get that? We didn’t do anything.”

It was interesting to note, however, that the teachers commented on how the quality of their teacher training improved once they were enrolled in class management and strategies courses. Stephen described his classroom management course as terrific. “The professor was terrific. The strategies course was good. There were plenty that was good… very helpful [and] very eye-opening.” Anne commented, “The strategies classes, which is what you would take before you go student teaching… I felt better because I finally knew what [education professors] were looking for.”

One of the more positive aspects of the teaching training among the teachers was through the student teaching practicum experience. “I definitely learned from on the job from the people I did my student teaching with, and from my co-workers, who… picking their brains and seeing their activities and trying different things,” Brian commented. “My student
teaching [experience] was great,” Anne had nothing but compliments to the classroom teacher who supervised her practicum experience:

> The lady who I taught with, she was incredible. She was a great teacher; I used to actually observe all her classes because whether I was going to teach it or not she had great techniques…. She was very encouraging; any problems that arose, she was very helpful, and calming me down and was always looking at the situation. She was good at teaching me not to take kids’ comments personally and kind of develop a thicker skin, which was something I had an issue with in the beginning of my student teaching and the beginning of teaching, in general. So she was great; she was very encouraging, I learned a great deal from her.

George admitted that while he had no formal student teaching classroom experience, he felt his time working for the National Park Service teaching school children had helped him tremendously. “When I was hired… I really had no formal classroom teaching experience whatsoever, so [the school district] took a bit of a chance but I think the fact that I had National Park Service credentials… that helped tremendously,” he said.

**Professional development opportunities.** The teachers in the case study were asked to describe the types of teacher professional development opportunities they felt were necessary to maintain currency, rigor, and effectiveness in student learning for historical understanding in the classroom. “I think it’s really important… whatever subject you are teaching, to have a firm knowledge of the content,” George remarked. “I think that there are [teachers] who have taught history that never majored in it and I find that problematic.” He
then also questioned whether many of his history professors from college had ever taken education classes. “So I think there is a huge disconnect between academic historians and public school teachers,” he concluded.

Teachers spoke of professional development workshops that focused on strategies to enhance students’ skills in the content area, particularly reading and writing in history. “Skills is [what] you want to be teaching, and probably reading is the crux of it all,” Stephen said. “I looked for courses on teaching reading in the content area, but not a lot of them are at the secondary level.” Each teacher who was interviewed mentioned the necessity for teaching and applying skills in the content area. Brian suggested the need for more workshops to enhance teaching strategies and to develop lessons dealing with controversial content and how to bring relevancy of obscure historical topics to the modern world, “There could be more time spent on strategies on how do you foster a healthy debate on controversial issues. We touch a lot of third rail topics, sometimes.”

The teachers interviewed would like to see more meaningful professional development that primarily focused on U.S. history topics and content. “This summer, I have a chance to participate in a [National Endowment for the Humanities] program in Mississippi and I’m really excited about that,” George commented. He then also talked about participating in another professional development summer program on the landmark case Brown v. Board of Education in Kansas through the Gilder Lehrman Institute of American History; “I get all these people and places that I’ve read about but have yet to go and visit.”

According to Stephen, one major benefit in taking part of such professional development workshops is “breathing new life in the curriculum… one thing I found this year is that having done this for the better part of almost ten years now, some of this stuff is getting a bit
stale.” Students are quick to know when their history teacher feels burned out, as Stephen recalled one of his high school history teachers.

**Need for a strong and viable U.S. History curriculum.** A sub-theme that emerged from the teacher interviews was the need for a strong and viable U.S. history curriculum framework at the local, state, and national levels. All of the teachers who were interviewed reported having a general positive attitude toward the 2003 Massachusetts History and Social Science Curriculum Framework. George had a generally positive view toward the framework; “I think [the state’s history curriculum framework] is adequate,” George remarked, “I think they tend to give emphasis on things that should be talked about, so I…don’t have issues with them at all.” Anne felt the state framework was broad enough to allow flexibility in terms of what to address and focus in class; “You can include a lot of things,” she said. Both Brian and Stephen mentioned how the framework attempted to expand to other subjects such as economics, government and law; “[State curriculum framework] try to have a balance of social history and political history,” Stephen commented in the interview. “It does a pretty good job,” Brian said, “because there is…weight toward economics and law….”

But there were general critiques of the document as well. Brian described the state curriculum framework as too dense: “You have to cover a lot of stuff. I’ve never come close to covering everything I’m supposed to cover in the framework… I just can’t. There’s not enough time.” Stephen presented it this way: “It’s like a laundry list; you got to cover this, you got to cover that…. I think it turns off a lot of students I think the history… that’s it just a bunch of… stuff.” Despite his earlier comments about the framework’s attempt to include other subjects in social studies, he criticized how the framework could have done more to address more social topics; “I think…there are more social, or groups of people and dynamics
of how people can get together… that could be more reflective in [the framework],” Brian remarked, “you’re not going to have everything reflected or be able to cover everything, you are not going to be able to go into much depth.” The teachers observed that the general organization of the state’s U.S. history curriculum diverts the focus of one historical theme to another without bridging the two together, sometimes taking the overall historical narrative into a totally different level of thinking. Anne expressed her opinions on the state’s U.S. history curriculum framework this way: “I don’t really like the way it’s organized. Like how some units, especially when you get to the Cold War or World War II, splits up in a way that is kind of awkward.”

Consider, for instance, the U.S. History standards in the Massachusetts History and Social Science curriculum framework (2003). The content standards are chronologically organized into time periods. While the framework identifies broad historical themes, the document does not clearly align the themes with the specific U.S. history content standards. The framework does introduce several broad historical themes for world history and U.S. history (see Massachusetts History and Social Science Curriculum Framework, 2003, pp. 8-10, 75) and it suggests how these themes can be incorporated into the curriculum. However, the descriptions of the themes simply state what students should learn and know and leaves it up to teachers to “develop other themes that might help students gain a deeper understanding of U.S. history in high school” (Massachusetts Department of Education, 2003, p.75).

Figure 4.2 on the next page displays an excerpt of the state’s History and Social Science curriculum framework, outlining U.S. history content learning standards for the time period between 1939 and 1989, which focuses on World War II and the Cold War Abroad:
Figure 4.2. U.S. History II Learning Standards

**World War II, 1939-1945**

USII.14 Explain the strength of American isolationism after World War I and analyze its impact on U.S. foreign policy. (H)

USII.15 Analyze how German aggression in Europe and Japanese aggression in Asia contributed to the start of World War II and summarize the major battles and events of the war. On a map of the world, locate the Allied powers (Britain, France, the Soviet Union, and the United States) and Axis powers (Germany, Italy, and Japan). (H)
   A. Fascism in Germany and Italy
   B. German rearmament and militarization of the Rhineland
   C. Germany’s seizure of Austria and Czechoslovakia and Germany’s invasion of Poland
   D. Japan’s invasion of China and the Rape of Nanking
   E. Pearl Harbor, Midway, D-Day, Okinawa, the Battle of the Bulge, Iwo Jima, and the Yalta and Potsdam conferences

*Seminal Primary Documents to Read:* President Franklin Roosevelt, “Four Freedoms,” speech (1941)

*Seminal Primary Documents to Consider:* Justice Robert M. Jackson’s opinion for the Supreme Court in *West Virginia State Board of Education v. Barnette* (1943) and Learned Hand’s *The Spirit of Liberty* (1944)

USII.16 Explain the reasons for the dropping of atom bombs on Japan and their short and long-term effects. (H)

USII.17 Explain important domestic events that took place during the war. (H, E)
   A. how war-inspired economic growth ended the Great Depression
   B. A. Philip Randolph and the efforts to eliminate employment discrimination
   C. the entry of large numbers of women into the workforce
   D. the internment of West Coast Japanese-Americans in the U.S. and Canada

**The Cold War Abroad, 1945-1989**

USII.18 Analyze the factors that contributed to the Cold War and describe the policy of containment as America’s response to Soviet expansionist policies. (H)
   A. the differences between the Soviet and American political and economic systems
   B. Soviet aggression in Eastern Europe
   C. the Truman Doctrine, the Marshall Plan, and NATO
Seminal Primary Documents to Read: The Truman Doctrine (1947), and George Kennan, “The Sources of Soviet Conduct” (1947)

USII.19 Analyze the sources and, with a map of the world, locate the areas of Cold War conflict between the U.S. and the Soviet Union. (H, G)
   A. the Korean War
   B. Germany
   C. China
   D. the Middle East
   E. the arms race
   F. Latin America
   G. Africa
   H. the Vietnam War

USII.20 Explain the causes, course, and consequences of the Vietnam War and summarize the diplomatic and military policies of Presidents Eisenhower, Kennedy, Johnson, and Nixon. (H)

USII.21 Analyze how the failure of communist economic policies as well as U.S.-sponsored resistance to Soviet military and diplomatic initiatives contributed to ending the Cold War. (H, E)

Seminal Primary Documents to Read: President John F. Kennedy, Inaugural Address (1961)
Seminal Primary Documents to Consider: President Ronald Reagan, Speech at Moscow State University (1988)

(Massachusetts Department of Education, 2003, pp. 78-80)

While the standards appeared comprehensive in scope, the teachers in the case study found some content learning standards inserted deliberately for the sake of inclusion; teachers also described the organization of the document, at times, disjointed or fragmented, thus making it challenging to develop smooth transitions from one topic, chapter, or unit to the next.

Massachusetts Comprehensive Assessment System. There have been many criticisms toward standardized testing, especially when there are high stakes involved—meaning, students must pass in order to advance or become eligible for a degree or diploma
But despite the general criticisms toward the state’s high-stakes standards-based assessments—the Massachusetts Comprehensive Assessment System, or MCAS—in U.S. history, the lack of such assessment became a primary concern of all the teachers who were interviewed because they felt it further marginalized the academic discipline in their school district and across the state. In 2009, the Massachusetts Department of Elementary and Secondary Education indefinitely suspended the U.S. History MCAS and waived its graduation requirements citing budgetary constraints (Chester, 2009). The teachers preferred having a high stakes assessment for U.S. history than not having one at all.

The teachers expressed concern that not having the state assessment for U.S. history impacted negatively on local school districts’ decisions to reduce funding for U.S. history programs, professional development, and teachers (see Babini, 2013; Wills, 2007; National Council for the Social Studies, 2008). “I worry that it sends this message that we are not on the same plane as those other subjects,” Brian said in his interview. “I hate the lack of MCAS,” George commented. “I think students and parents take it much more seriously you are a ‘tested’ subject, so if [English Language Arts, math, and science] is going to have [MCAS], then so should [U.S. history].”

**Common Core State Standards.** In 2009, the National Governors Association (NGA) and the Council of Chief State School Officers (CCSCO) developed a common core of state standards in English language arts and mathematics for K-12 students. The Common Core sought “to define the knowledge and skills that students should have to succeed in entry-level, credit-bearing, academic courses and in workforce training programs” (National Governors Association, 2011). In July 2010, the Commonwealth of Massachusetts joined 44
U.S. states, as well as the District of Columbia and four U.S. territories, and adopted the Common Core as part of its state English Language Arts and Mathematics curriculum frameworks.

Reaction to the Common Core was mixed among the four teachers who were interviewed. Stephen applauded the Common Core for making sure students are able to read and write critically. “It doesn’t get any better than that,” he remarked; “I mean, if [students] can learn how to read objectively… it’s just more valuable. It seems like we’re heading in the right direction; these are all things we should be doing.” Brian and George, for instance, expressed feeling conflicted over the Common Core, both recognizing the benefits and the disadvantages. They both viewed the Common Core positively in that it focused on critical reading and writing in history and social studies. “I like the idea… that it is more about skills… they can use in going forward, so I like the idea of trying to bolster that,” Brian remarked. “The emphasis on critical thinking skills, sort of dissecting documents, and being able to write critically about things is good. These are things that I have been trying to do in my classroom over the years,” George said.

While they saw merits in the initiative, they also felt that the Common Core completely ignored history as a stand-alone academic discipline. Anne was most critical on the Common Core in her interview; “I don’t like the direction of the Common Core because I don’t want curriculum to get dumbed down.” George and Brian also felt that some U.S. history content were inserted inappropriately simply for the sake of incorporating some U.S. history in a document that for the most part completely ignored the subject matter as an academic discipline. For instance, both Brian and George in their respective interviews questioned the use on certain primary documents in particular grade levels. “I have questions
about why a sophomore or junior in an English language arts class needs to be analyzing Federalist Papers Number 10 in ways that most law students haven’t,” George commented. “It seems like the Federalist Papers Number 10 is the holy grail of American political documents,” Brian remarked. “Maybe that’s great and all, but we’re talking about Federalist Papers from the [1700s]; there are other documents that are more recent; [Common Core’s] heart is in the right place… but their execution I think is not as successful.”

**Administration support of the U.S. History curriculum.** The four teachers interviewed collectively felt that their respective school administrators at the building and district levels provide adequate support for history and social studies, but more can be done at the district level to allow opportunities for students to acquire learning for historical understanding. “I think our district has always been very supportive of U.S. history and government. Making sure that government is a graduation requirement, making U.S. history a graduation requirement. I think that alone speaks volume,” Stephen commented. “Our department head is very focused on supporting and creating and growing a viable and rigorous U.S. history curriculum and showing why it matters,” Brian remarked.

However, the teachers also acknowledged that emphases on the English Language Arts, mathematics, and science curriculum by federal and state departments of education have prompted local school district officials to concentrate on increasing personnel, curriculum, and instructional support to those academic disciplines than to history and social studies. Brian made the following remark in his interview in response to that reality:

I realize the global world we live in; that science, technology, engineering, and math are places America has fallen behind… but I also think that the skills and
concepts and ideas discussed in history and social studies curriculum help in so many areas…. Unlike every other subjects, we really do incorporate every subject; art, music, science, English, foreign language, physical education, health; they all get touched upon in the U.S. History curriculum.

Summary of emerging themes

The data gathered from the interviews and classroom observations in the two high schools were analyzed to investigate what key core concepts of learning for historical understanding looked like these U.S. History classrooms. Observation notes and researcher memos were used to help organize the data into emerging themes and research findings, and inform me, as the primary researcher, to scrutinize the teacher interview transcripts and classroom observation notes. The data was primarily used to explore and help answer the overarching research question, “What does learning for historical understanding look like in public high school standards-based U.S. History classrooms?” In addition to the overarching research questions, the research study also explored the following questions:

- How do teachers describe their experience with effective learning for historical understanding?
- How do students experience effective learning for historical understanding?
- What types of structures and strategies help support or impede opportunities for student learning for historical understanding?

Four key themes emerged from the initial analysis of the data gathered from the semi-structured teacher interviews and the activities that were observed in three separate high school U.S. History classrooms. The key themes that emerged were:
• Early positive encounters and experiences in learning U.S. History fostered motivation, interest, and achievement in U.S. History;

• High school students were more likely to practice, obtain, and demonstrate learning for historical understanding when actually engaged in some type of learning activity;

• Expanded access to explore, research, and examine historical data and content increased opportunities for students to demonstrate learning for historical understanding; and

• Teacher preparation through quality professional development and curriculum planning was an essential component to create opportunities for learning for historical understanding.

The first theme that emerged from the initial analysis of the data gathered came from the semi-structured interviews of four high school U.S. History teachers who shared their early memories as students learning U.S. History. The teachers described their first encounters—whether it was being exposed to U.S. history by an individual, or learning experience in a U.S. history class in junior high or high school, or visiting an historic site or museum—that immediately grabbed their interests in U.S. history. They also shared their own curiosities about their own identities as American citizens, and how they became fascinated with the subject from that point on in their lives.

The second theme focused on teachers’ observations of today’s high school students in their respective U.S. History classes. In the teacher interviews and the U.S. History classes observed, the students were expected to become active participants in the learning process rather than passive recipients of information in U.S. history classrooms. The teachers were
constantly encouraging their students to engage in class discussions, to make present-day or personal connections with the historical topic that was learned in class, to conduct research through primary sources and technology to answer an essential question or to explore theories of an historical event or decision, and to articulate historical findings and support their findings through historical fact and data.

In the third theme, teachers discussed how accessing historical content has evolved over time and how it has impacted ways in which today’s high school students learn for historical understanding in U.S. History classrooms. U.S. history textbooks are simply one of many tools for effective learning and are often times used improperly or relied upon too much to the point it becomes counterproductive in the learning process. Teachers also discussed how the quality of the history content, format, and readability in U.S. history textbooks are essential components to determine its role and use in learning for historical understanding in their classrooms.

The fourth theme that emerged was that teacher preparation through quality professional development and curriculum planning are essential components for creating meaningful learning opportunities for historical understanding in high school U.S. history classrooms. The teachers interviewed felt that the U.S. history curriculum must maintain a balance between history content and skills, particularly in reading, writing, and critical thinking and reasoning. Attitudes toward the Common Core state standards were mixed, but all agreed that the well-intended focus on historical literacy was important and should be incorporated into student learning expectations in the U.S. history curriculum.
The teachers also all agreed that teacher professional development opportunities in which core concepts of learning for historical understanding were incorporated are highly effective in, as one teacher stated, “breathing new life” into a subject area that can quickly become stale and monotonous as well as expanding their teaching repertoire for the classroom. These types of professional development, teachers asserted, must be continually supported by local school districts and state and national departments of education in order to increase and enhance meaningful opportunities for effective student learning for historical understanding in U.S. history classroom in high schools across the state and the country.
Chapter V: Discussion of Major Findings

Revisiting the problem of practice

While there have been recent efforts to improve the overall public education system in the United States; American students continue to graduate from public high schools with limited knowledge of United States History (Ravitch, 1988; Evans, 2004; Ross, 2006; St. Jarre, 2008; Dillon, 2011). Despite the recently growing access of history content through the Internet and popularization of U.S. history topics and figures through television and motion pictures such as HBO’s Band of Brothers mini-series and Steven Spielberg’s Lincoln, there has been no evidence of any improvement in student achievement in U.S. history in U.S. public high schools (Dillon, 2011). Former Supreme Court Justice Sandra Day O’Connor raised concerns in response to the 2010 NAEP test results in U.S. history, government and civics, in which fourth grade and eighth grade students tested fell below the basic proficient category. “We have a crisis on our hands,” Justice O’Connor remarked in a press release (National Assessment Governing Board, 2011).

As I now enter my third decade of service in public education, I have found myself reflecting on how certain aspects in teaching and learning for historical understanding have evolved and, at the same time, how some aspects in teaching and learning have remained unchanged and persist the problem of educational practice. Earlier and recent studies have asserted that U.S. public high school students continue to learn U.S. history through traditional methods of instruction such as teacher-centered lectures, teacher-led class discussions, independent note-taking, textbook readings and answering questions from the readings, and multiple-choice and written examinations (Gross, 1977; Weiss, 1978; Harmon,
Instructional activities and practices that incorporated core concepts of historical understanding have remained underutilized in many public high school U.S. history classes because of certain contextual constraints (Goodlad, 1984; Downey & Levstik, 1988; Mehlinger, 1988; Stiggins, 2002; Harmon, 2006; McGuire, 2007; St. Jarre, 2008).

The problem of educational practice presented in this qualitative research case study has challenged high school administrators and curriculum leaders, U.S. history teachers, and students to identify elements and conditions that impact learning the key core concepts for historical understanding. What encouraged high school students to learn for historical understanding? How can U.S. history classes enhance and expand opportunities that would enable high school students to develop a deep understanding of the historical past?

The primary focus of my qualitative case study research was to investigate how students develop historical understanding looked like in standards-based high school U.S. history classes at two suburban public high schools in Massachusetts. The case study intended to assist U.S. history teachers to look for the tools and resources to plan learning opportunities in high school U.S. history classrooms to enable students develop deep historical understanding and achievement in U.S. history classes. Perhaps if this case study could capture and identify the characteristics and qualities of effective learning for historical understanding in high school U.S. history classrooms, then teachers could create and expand opportunities to design and plan learning-centered activities that foster historical understanding; more meaningful opportunities for learning would increase students’ academic success and achievement (Boykin & Noguera, 2011).
This qualitative case study research was designed to address the research question, “What does learning for historical understanding looked like in public high school standards-based U.S. history classrooms?” The case study involved a thorough review of the literature on the topic of historical understanding and the gathering and analysis of data from two public high schools in the suburbs of Boston, Massachusetts. The data gathered included one-on-one semi-structured interviews with four high school U.S. history teachers and direct and unobtrusive observations of three high school U.S. history classrooms. The entire data gathering process occurred from late April to mid-May 2013. Interview transcripts, observation notes, documentary evidence analysis notes, and researcher’s memos were carefully and thoroughly read and methodically coded according to major common themes that emerged in the initial analysis.

High school students were invited to participate in small student focus groups that would meet after school to capture and analyze students’ perspectives on learning for historical understanding. Because the data collection occurred late in the school year, students declined to participate due to after school athletic events and other commitments. After repeated attempts to reschedule the student focus groups, this portion of the data collection was abandoned for this case study research.

Discussion of major findings from the case study

The research data gathered were analyzed through the lenses of the literatures, theoretical frameworks, and research questions. Key themes emerged through multiple sources of data that help identified some major findings in this qualitative case study research (Saldaña, 2009). I found the major findings conclusive based on the nature and scope of the
research data that was collected and analyzed. Although the scope of the research data was limited to five high school U.S. history teachers in two public high schools, I am satisfied that the participants of this case study were representative of a larger unit.

There were moments in my research when I discovered and explored different avenues of thoughts on what learning for historical understanding looked like in U.S. history classrooms. These avenues of thoughts allowed me to challenge my preconceptions from prior and present knowledge on learning for historical understanding and helped me avoid bias in my final report of this case study. The moments occurred during the data gathering process from the semi-structured one-on-one interviews and the observations in the U.S. history classrooms.

Through my research, I have come to realize some new thoughts on learning for historical understanding: students who were actively engaged with the curriculum and instruction exhibited deep historical understanding; U.S. history classrooms are equipped with many tools and resources for learning that can easily incorporate the core concepts of learning for historical understanding; these tools and resources were underutilized due to some contextual constraints that exist in U.S. public high schools; meaningful teacher professional development and curriculum planning have compelled teachers to create more opportunities to learn for historical understanding in U.S. history classrooms; and learning for historical understanding has prepared students to practice and acquire higher order intellectual skills and to become critical and analytical thinkers.

The major findings of this case study are (1) historical understanding is the integration of content knowledge, its relationships to larger historical contexts, and significant
implications to the present-day world, (2) students were motivated to learning U.S. history when it was interesting and relevant in their lives, (3) teachers utilized various tools and resources that foster learning for historical understanding in U.S. history classrooms despite contextual challenges, (4) high school students employed their higher order cognitive thinking and analytical skills when instructional activities incorporated the core concepts of historical understanding, and (5) local school districts’ U.S. history curriculum is the key to foster historical understanding in the classroom.

**Historical understanding is the integration of content knowledge, its relationships to larger historical contexts, and significant implications to the present-day world**

The first finding simply defines historical understanding. While some contemporary researchers in history education have used terms such as historical literacy (Van Drie & Van Boxtel, 2007), historical thinking (Seixas, 1993; Wineburg, 2001), and historical reasoning (Leihardt et al., 1994), the term “understand” has been commonly used in the national and states’ social studies curriculum frameworks, published curriculum materials including many textbooks and workbooks, and teacher-developed unit and lesson plans. However, “understanding” is different from knowledge, as McTighe and Wiggins (1999) wrote, “Knowing the facts and doing well on tests of knowledge don’t necessarily mean that students understand what they know and doing poorly on tests of factual knowledge doesn’t mean that students lack insight into the key ideas of a topic” (p. 8).

McTighe and Wiggins (1999) credited much of their work in *Understanding by Design* to Benjamin Bloom (1956) for his work, *Taxonomy of Educational Objectives, Handbook 1: Cognitive Domain*; Bloom asserted that understanding can be broken down into
Six levels from knowledge (lower order thinking) to evaluation (higher order thinking).

Decades later, in the 1990s, to better align instructional practices for the twenty-first century, former students of Bloom revised his taxonomy in which creation, not evaluation, was determined as the highest level of understanding (Wilson, 2006). In *Understanding by Design*, knowledge is just one of many facets for students to develop deep understanding of a topic (McTighe & Wiggin, 1999).

Many educational researchers have acknowledged historical understanding as integrating history content knowledge, its relationships to larger historical contexts, and significant implications to the world and society in which we today (Seixas, 1993; Gardner & Boix Mansilla, 2000; Bain, 2005; Stokof & Bermudez, 2008; Wineburg, 2001; Van Drie & Van Boxtel, 2007). Historical understanding can also be viewed as the total sum of basic historical knowledge of the content and the historical context (Anderson-Inman & Kessinger, 2000). According to the National Center for History in the Schools (2011), reaching deep historical understanding requires students to be actively engaged in the learning process such as asking questions about a past significant event, interviewing individuals who lived in the community or lived through an historic event, analyzing primary source documents, thinking critically through cause-effect relationships, and constructing time lines and narratives of their own.

The teachers who were interviewed for this case study looked for moments when their students were able to develop deep understanding of the historical past through critical inquiry, analysis, and evaluation. While their students sit through many lectures and presentations in their U.S. history classes, the teachers created opportunities to allow students to make sense of the information presented to them and to think critically about its validity.
and its impact to society, to the world, and to their own lives. It is this moment of opportunity when students became actively engaged with historical content information and sought historical reasoning of a past event, act, or decision.

**Incorporating core concepts of historical understanding fosters student interest level and active engagement in learning U.S. history.**

So what did it look like when students “understand” the political and economic factors that led to the market crash in 1929, or when students “understand” the argument for and against the ratification of the United States Constitution? How did teachers know when their students show an “understanding” of the political, economic, and social impacts of Reconstruction in the South? How did students know when they have “understood” the implications of the Supreme Court’s ruling on the Dred Scott case? If the first finding defined historical understanding, the second finding described what historical understanding looked like in U.S. history classrooms.

A review of the literature and the research data have revealed that instructional activities that incorporate the core concepts of historical understanding enabled students’ interest levels in the topic and are more like to become actively engaged in learning U.S. history (see Downey & Levstik, 1991; Wineburg, 2001; Bremer & Morocco, 2003; Marzano, 2003; Pattiz, 2004; Wineburg & Martin, 2004; Hawkey, 2007; Barton, 2008; Stoskopf & Bermudez, 2008; Schmoker, 2011). The teachers interviewed reported their students were able to provide plausible explanations for why and how events occurred in the historical past. The teachers interviewed also reported observing students who were actively engaged in class tended to retain history content long after it was first introduced to them; “It’s those activities
that tend to stick with them and seem to have the most meaning,” George remarked in his interview.

However, part of the problem of practice has been planning and implementing multiple learning opportunities that enabled high school students to become actively engaged in learning. History has often been seen as boring and disconnected from the human spirit (Zuckerman, 2000; Wineburg, 2001; McGuire, 2007). Limited instructional time, extensiveness of U.S. history content standards, and objectivity of standardized assessments has forced many U.S. history classes into teacher-directed recitation, memorization of facts, and frequent use of the U.S. history textbook as an authoritative source of content.

This is not to say that teacher-led direct instruction and some memorization of facts are bad and should be avoided. In fact, the teachers felt there are times when such instructional practices are necessary to discuss contexts to topics that are being introduced or addressed in class or from the readings. They don’t believe that students should be engaged in some type of “fun” activity in class every day. The teachers all agreed that there must be a balance in terms of instructional practices to learning history. The challenge, though, is how to maintain the right amount of balance that keeps students engaged in learning for historical understanding. In recognizing this challenge, the teachers interviewed discussed two key contributors to keep students actively engagement in learning: interest level and relevance of the content in their lives.

Make U.S. history interesting. According to research, as students get older, their interest and motivation toward general academics decline (Schiefefe, 1991; Hidi & Harackiewicz, 2000). To make matters worse, many high school students have already found
U.S. history as an academic subject completely boring and irrelevant for a variety of reasons: rote memorization and regurgitation of trivial facts, dates, and events, boring teacher-led lectures, wordy textbooks, and dull filmstrips, etc. (Weiner, 1995).

So how can we generate greater level of interest and engagement to unmotivated and disengaged students? Hidi and Harackiewicz (2000) suggested creating and utilizing situations to generate greater interest. Such situations may trigger situational interest, which could result in motivation to learn more about a topic or subject matter, and transform into intrinsic interest that would sustain over time. Increasing a student’s level of interest would enable the student to develop meaningful personal connections to the subject matter (Bruner, 1977). As a result, the student would pay more attention to details and easily encode more content information (Mazer, 2013).

In exploring how to raise any student’s level of interest in U.S. history, the case study interviewed four high school U.S. history teachers and asked them to reflect on how they became interested in learning about the nation’s past. All the teachers interviewed reported getting excited about learning U.S. history when they were visiting a historic battlefield and watching a battle reenactment, or visiting a historical site, or sitting at home listening to their parent or grandparent about an historic event they lived through or witnessed, or witnessing an historic moment such as the assassination attempt on President Reagan, the Challenger spaceship explosion, and the tearing down of the Berlin Wall. These were moments the teachers recalled that captured their attention and interest in learning U.S. history, and many of these moments did not occur in the U.S. history classroom; and for those that may have happened while in the classroom was not particularly part of the formal instruction that took place that was planned.
When the teachers were asked what motivating factor steered him or her to want to learn U.S. history as high school students, each of them described a sense of humanity in the subject matter; that history was the story of human existence—it was about us as participating members of a global community. To them, learning history was learning about ourselves, who we are as Americans, and what it means to be a United States citizen. It was this sense of identity and self that brought a greater level of interest in learning U.S. history.

Content must be worth learning and knowing, and able to reach all students in ways that will raise their level of interest. Initiating historical research can introduce topics in U.S. history that can place students in a situation where their interest level rises (see Hidi & Harackiewicz, 2000). Historical research allowed students to “get lost in research” and to discover or construct new interpretations about the historical past. Teachers need to plan effective approaches in having students utilize their skills in using technology to further their learning.

Learning for historical understanding helps to create a sense of identity of oneself and nation, and foster respect of the past and make sense of the present (Partington, 1980; Bradley Commission on History in Schools, 1988). History, according to Sam Wineburg (2001), is the only subject area in the school curriculum where students can learn about being part of the human experience. Throughout his interview, Stephen made several references to the human element and empathy as the impetus for learning U.S. history; “I tried to tell that to my students,” Stephen remarked, “History is about people; it’s about humans; humans making mistakes, making decisions… changing their ideas, their points of view; we’re all human, so we can identify with…. We stress the word empathy a lot.” Stephen’s sentiments were not
alone, as the other teachers have also made references to the human element in their interviews.

Sometimes taking students out of the everyday environment (i.e., classroom) can stimulate their interest level. This is why some teachers would like to take their students to nearby or local historical sites as primary sources; these places, such as Old Sturbridge Village, Plimoth Plantation, Lowell Mills, have been planned and designed for students to watch, observe, and to some extent experience what life was like in the historical past (Harper, in Shiroma, 2000). One teacher, Robert, arranged after school film screenings to the local movie theater for students in his U.S. history classes to see films such as Lincoln and 42; he then arranged post-screening chats at a nearby diner where students can debrief, critique, and compare a “Hollywood” version and historical accounts from primary sources.

**Making U.S. history relevant in students’ lives.** When students encounter content that appears relevant in their lives, they are more likely to be motivated and engaged in the learning process (Newmann, 1992; Tileston, 2004). Simulated activities such as mock trials, mock debates, and role-playing can increase relevancy of the content being learned to the student. Experiencing a situation—even in a simulated situation—enables the student to observe or witness, hear, and react to what is happening around him or her. It helps to create a context to the historical event or issue that is being learned because now that student has lived through, albeit simulated, or imagined the conditions those who once witnessed or lived had experienced.

Part of making U.S. history relevant and real is to include the student as part of the American historical narrative (Mayer, 1998). Students enter the classroom with their own past
lived experiences and understanding of their world. The culture—racial, ethnic, national background, etc.—or lifestyle of the student’s family can also have a significant influence on how the student views the world, the government, and our nation’s history. The U.S. history curriculum must allow students to make their own meaning of the content (Donovan & Bransford, 2005).

The teachers interviewed and observed described activities planned for the classroom that enabled their students to incorporate or apply their prior and current knowledge to construct new interpretations and understanding. Students brought with them preconceived understandings of U.S. history, which could affect their constructed interpretations of new history content that are introduced and addressed in the class either from the textbook, teacher, or their fellow classmates (Maypole & Davies, 2001). Students enter the classroom with knowledge that was generated from their parents and relatives, television and film, newspapers, literature, and the Internet. The U.S. history classroom is where a student’s prior and current knowledge and preconceived understandings of the world intersect with new content information introduced or discussed in class. Students may perceive the political, socio-cultural nuances of the American historical narrative in the U.S. history curriculum as a validation to their lived experience or they might encounter conflicting narratives that counter their personal beliefs, interpretations, or understanding (Chisholm, 1994; Maypole & Davies, 2001). Students who found themselves in such conflicts become frustrated and withdraw themselves from the class activities and assignments (VanSledright, 2004; Fredericks & McColskey, 2011), thus reducing their level of interest and engagement in their learning.

Therefore, teachers must remain mindful of their students’ cultural or historical backgrounds, lived experiences, and preconceptions of the subject matter, and embrace
multiple interpretations of historical content and evidence introduced in class. Teachers in the case study have worked to create safe learning environments where their students could freely share their own interpretations and views of the history content information presented in class. Teachers have asked students questions such as, “have you ever been in a situation…” to place them in a past situation or encounter that was similar to an event that occurred in the past. Keep in mind that simple association or comparison examples may be too simplistic for students to sincerely comprehend or understand the event or topic, but it would certainly help provide student an entry point of learning to construct deep understanding of the current unit of study (Marzano, 2007). However, associating or assimilating a personal lived experience can help enable students to develop an understanding of the action or decision made by an individual who lived in the historical past (Sheehan, 2005; Marzano, 2007; Riggs & Gholar, 2009).

The teachers also posed questions to place students back in time to empathize with those who lived back then. Through simulated role-plays and experiences, students have the opportunity to acquire a personal glimpse of what life might have been like back then or what it was like to be in a situation, in order to understand the decisions and actions that people who lived in the past have chosen. Some of the teachers have incorporated current news events because students are familiar with the event introduced, and they make it easier for students to transfer the knowledge of the event to an event that occurred in the historical past.

It was also important to the teachers that their students construct new knowledge and understanding on their own or even with each other, rather than having students read from the U.S. history textbook or take copious notes from a teacher-led lecture. Students who construct knowledge independently tend to retain content knowledge (see Dewey, 1938; Kobrin,
Abbott, Ellinwood, & Horton, 1993). Some teachers found Socratic round table discussions, collaborative activities and projects, and simulated activities to be more effective approaches in fostering prior and current knowledge into new avenues for learning.

Many historians and education policymakers have maintained that learning U.S. history produces a “well-informed and civic minded citizenry” in order to sustain democratic traditions and institutions (U.S. Department of Education, 1983; Stearns, 1988; Bradley Commission on History in Schools, 1988; Risinger, 1993; McGuire, 2007; National Council for the Social Studies, 2008). The two public high schools used the following terms in their mission statements and beliefs: community, members of a diverse and global society, civics, democratic, and citizens. The teachers also saw learning U.S. history as a civic duty and therefore relevant in students’ lives; “We’re not only making better students,” Brian affirmed in his interview, “We’re making better citizens.”

**Teachers utilized various tools and resources that foster learning for historical understanding in U.S. history classrooms despite contextual challenges**

The present contextual challenges described in Chapter Two have affected the utilization of available learning tools and resources for high school U.S. history classes. One of the more impactful challenges was the standardization and testing movement, which constrained the U.S. history curriculum by concentrating on the breadth rather than depth of the subject matter (McGuire, 2007). The teachers interviewed have conceded that they cannot cover all of U.S. history in a single survey course. At the same time, they do not want to have high school students approach learning U.S. history simply through teacher-led lectures, rote memorization of facts, events, people, and places. This complicates learning for historical
understanding given the contextual challenges such as the nature of the U.S. history curriculum and the limited time for meaningful instruction.

**History textbook take a background role.** The case study investigated how teachers and students made use of the existing learning tools and resources in the classroom. The case study found that the U.S. history teachers have reduced the role of the U.S. history textbook and focused more on using primary source documents and materials and curriculum resource kits that offer engaging activities including mock trials, mock debates, and role-playing simulations. Some of the teachers interviewed reported hardly making use of the textbook in class and instructed their students to leave their textbook at home until the end of the school year.

Consistent to Lavere’s (2008) findings, the notion of the textbook as an authoritative source of information is no longer the popular belief among the teachers interviewed. The progression of technology use for instruction and learning has expanded access to examine first-hand and multiple perspectives and points-of-view on historical events and major historical issues that U.S. history textbooks would otherwise tend to omit (Loewen, 2008; Robelen, 2011). While the U.S. history textbook has no longer been used as the primary instructional tool, the teachers interviewed were not willing to abandon the U.S. history textbook. The U.S. history textbook, for all intents and purposes, remains “familiar, efficient, portable, and relatively cheap” (Sewall, 2000, p. 4), and still presents valuable context to certain topics in U.S. history that students are expected to know and understand. The teachers all agreed that the textbook they use, from time to time, provides sufficient background information or overview on certain topics in U.S. history, and prefer students to learn through multiple sources of information.
The teachers have now started using the U.S. history textbook as a springboard to introduce and address topics and issues that are aligned with the students’ current knowledge and understanding of their world. In other words, the teachers planned instruction to deliver content that is relevant to students, something they felt their textbooks lacked, echoing current research (Sun, Heath, Phlegar, & Dimock, 2007). The teachers value these circumstances as opportunities to plan and implement engaging lesson activities and assignments that foster historical understanding.

**Alternative resources and tools.** The teachers interviewed and observed have each demonstrated their resourcefulness by making the best use of the learning tools and resources available. All the teachers interviewed described implementing or assigning learning activities using curriculum materials that would enable students to research or investigate an historical event, interpret and analyze data, and produce works that reflect their learning for understanding. These activities and assignments can lead to active learning and foster critical thinking, historical reasoning, and problem solving (Shiroma, 2000). Some teachers described moments when a student attained historical understanding of a topic or concept after having participated in a simulated mock trial or mock debate because the student was able to make meaningful sense or recognize historical implications of events, people, and issues of the past.

Through the interviews and observations, the teachers described incorporating primary source documents and artifacts in their U.S. history classes throughout the school year. Primary sources are first-hand documents or artifacts that contain evidences about the historical past (Shiroma, 2000; Robelen, 2011). These can include newspapers and magazines, letters, diaries and journals, music, architecture, paintings, and photographs. What teachers like most about using primary sources is that these documents or artifacts can be
presented without interpretation by an historian author or even by the teacher. Primary sources can offer different or multiple perspectives and points-of-view on an historical event or period (Robelen, 2011).

**The role of technology.** The teachers have also moved toward more research-based tasks and activities by taking students to the high school’s media center or computer lab and have them create multimedia presentations on their research. Technology integration has transformed the way history content is delivered in U.S. history classes today (Sun et al., 2007; Kolikant, 2010). The teachers interviewed and observed also created opportunities for students to use technology to acquire history content as well as skills to access, research, and expand new content. All the teachers have taken students to the media center where there are computer stations or computer labs to conduct research, construct charts and tables using statistical data, and create presentations, wikis, websites or blogs, and even short videos to communicate content knowledge learned.

Technology as an instructional tool has also enhanced the way in which content is delivered. Technology allowed teachers to create opportunities for students to apply content knowledge into deep understanding of the historical past. All the teachers reported using their computers on a daily basis to design curriculum, develop instruction, write assessments, and manage their classrooms. The teacher’s computer is frequently relied upon and used to provide history content in varied formats, including visuals, video, and sound. Access to the Internet in the classroom has also transformed how additional content through current news websites and YouTube help clarify the targeted content standards or bring content to life. The teachers interviewed described how technology integration had a considerable impact on their
ability to bring in new content, resources, and materials to the existing curriculum, and also finding new lesson activities and ideas from other teachers in a different school district.

Thus, the general approach in learning for historical understanding is for students to construct and convey their own interpretations of historical events and actions by examining and analyzing primary source documents, historical accounts, and other pieces of historical evidence as well as secondary sources to corroborate and verify their findings or reasoning. This finding supports the previous finding on empowering students to be actively engaged in their learning by contributing their knowledge and worldviews through discourse rather than consuming historical content information. This not only makes learning U.S. history interesting, it also allows students to realize the relevance in their lives.

**High school students tend to utilize their higher order cognitive thinking and analytical skills when instructional activities incorporated the core concepts of historical understanding**

The fourth finding of the case study discusses the impact of learning for historical understanding on high school students. The teachers interviewed described how students were more likely to utilize higher order cognitive skills when the activity incorporated one or many of the core concepts of historical understanding. The teachers believed the core concepts made it easier for history content to be interesting and relevant in students’ lives. Activities that allow students to become “active investigators” have provided meaningful opportunities and practice to enhance their critical and analytical thinking skills (Stoskopf & Bermudez, 2008). The teachers also said their students not only retain history content information, but
they have acquired the ability to use history content to explain an historical event or to justify their reasoning or claim on a past event or decision.

The teachers in the case study found that examining and analyzing primary sources was the most popular approach in getting students to become active investigators of the past. The teachers liked to incorporate primary sources because students are then able to visualize a past event. Teachers saw primary sources helped students generate meaningful questions (i.e., historical inquiry) and conduct further research on the evidences found in the primary source (Maypole & Davies, 2001). The teachers wanted to create situations where students become curious to investigate the historical contexts of the primary source. They also saw primary sources helpful in clarifying the historical contexts of the topic introduced in class. One teacher quoted that students could grasp what those who had lived back then were able to see or witness and imagine how they felt, which a textbook could not do as easily; “I think most [students] are visual learners,” he said, “Seeing an image, I don’t see how it is a negative.”

The teachers also discussed how integrating technology was important because of its demand in college and work (Salpeter, 2003; Trilling & Fadel, 2009). Some of the teachers stated they no longer have students create posters by hand, for example; instead students designed slideshow presentations using PowerPoint. The teachers liked how integrating technology skills provide students not only access to new content knowledge for understanding but also to construct historical thinking, interpretation, and reasoning of their own.

The teachers also liked having students engaged in some form of role-playing such as in a mock trial or debate. They describe how they have their students spend time prior to trial
examining evidence to build their cases, preparing testimonies, and writing their arguments. Throughout the simulation activity, students are investigating, analyzing, and making sense of the history content they have researched. These activities have also enabled students to realize and acknowledge multiple perspectives, points-of-view, and empathy (Poorman, 2002). The teachers discussed how their students found topics in U.S. history more interesting through simulation activities because students realized how past events and decisions have impacted individuals and families. Simulation activities can also help enable students to exchange differing perspectives and points-of-view through civil discourse to seek reasonable consensus or common agreement (Meziro, 2000).

This is an important finding especially since students are expected to demonstrate proficiency in literacy and communicating skills including reading, writing, speaking, listening, analyzing, evaluating, and using media and technology; skills that are defined in the Common Core State Standards. The activities in which students utilized the senses and their emotions can enhance their understanding of the past; “The textbook can’t do that,” one teacher commented in his interview.

The activities that incorporate the core concepts of historical understanding fosters learning opportunities for students to utilize and practice their skills in inquiry, interpretation, analysis, and reasoning (Stearns, 1998; Wineburg, 2001; Bain, 2011). In order for students to demonstrate their understanding of the historical past, they must also utilize their communication skills such as critical writing and speaking as well as using technology skills to produce videos or design multimedia presentations (Means, 2004).
Local school districts’ U.S. history curriculum is the key to fostering historical understanding in the classroom

The fifth finding of the case study focuses on the local school district’s U.S. history curriculum. Robert J. Marzano (2003) has maintained that a “guaranteed and viable curriculum,” which includes opportunities to learn and time, impacts student achievement. Teachers need to integrate their knowledge about the curriculum and how to effectively deliver it through meaningful and engaging instruction that foster student learning (Timperley, Wilson, Barrar, & Fung, 2008). Additionally, content must be worth learning and knowing, and able to reach all students in ways that will show relevance in their lives and raise their level of interest. However, when the curriculum appears disjointed or fragmented, going from one content standard, topic, unit or chapter to the next becomes challenging for students to sustain the momentum of high level of interest, motivation, and engagement in learning. School leaders and teachers need to examine its district’s U.S. history curriculum to ensure it allows for clear and gradual transitions between themes across time and presents broad or overarching themes that are relevant in their lives that are embedded throughout the curriculum. The incorporation of essential questions is a great example to link overarching themes to content (see Wiggin, 2007); “One meaning of essential,” he writes, “involves important questions that recur throughout one’s life” (para. 3).

The U.S. history curriculum must show significant relevance in students’ lives (i.e., why it matters) while, at the same time, open opportunities for students to apply and practice skills necessary for college, career, and civic life. Students are more apt to learn something when it matters to them or if it can help them later in life (Frymier, 2002). Some teachers looked to having students create PowerPoint slide show instead of a poster to use as part of
their in-class presentations because they will most likely create PowerPoint presentations in college and the workplace.

This case study has revealed the great potential of capturing a student’s level of interest in a subject area that many consider it boring, dull, and obscure. Several researchers in the field of history education found that the U.S. history curriculum is disconnected, unclear, overwhelming, and inconsistent (Mehlinger, 1988; Jackson, 1989; Duea, 1995; Zenger & Zenger, 2002; McGuire, 2007; St. Jarre, 2008). Upon reviewing the state’s History and Social Science curriculum framework, a few selected high school U.S. history textbooks, and local school districts’ U.S. history curriculum documents or curriculum guides currently implemented in public school districts across Massachusetts, I observed how the documents lacked conviction by downplaying the human element and the explanation about why learning U.S. history matters.

The school district’s U.S. history curriculum is the primary and central document that guides high school’s U.S. history teachers to plan and implement in their classes. The document must (a) align with the U.S. History content learning standards as outlined in the state’s History and Social Sciences curriculum framework, (b) reflect the Common Core State Standards for Literacy in History and Social Studies, and (c) identify specific learning tools and resources that are available to all U.S. history teachers in the school district. Such a document becomes more helpful when it specifies meaningful methods or available assessment tools to measure a student’s proficiency or mastery in topical knowledge and understandings of the content standards in U.S. history (McTighe & Wiggin, 1994; Kemp, 2006; Resnick & Resnick, 1992). This document must also be designed so that all stakeholders—e.g., students, teachers, school leaders, parents, etc.—can easily and clearly
identify the learning outcomes in U.S. history that all students are expected to learn and know upon graduating from high school.

**Professional development.** The local district’s U.S. history curriculum does not only drive instruction and learning, but it should also call for and support meaningful professional development for U.S. history teachers (Mooney & Mausbach, 2008). Even though the participants in the case study are highly qualified to teach high school U.S. history, they collectively found the number and quality of professional development opportunities offered for U.S. history teachers have been modest. When asked about the kinds of professional development they would like to see, a common response was professional development that focuses on linking content and instructional practices that engage students to learn for understanding. The teachers really liked to participate in content seminars or institutes, such as the Gilder-Lehrman Institute, National Endowment for the Humanities, and Teaching American History grants. Some, however, require long distance travel at the individual teachers’ expense and they must be able to participate on their own free time. While these programs offer a wealth of content and pedagogy to enhance student learning, these may not be viable or affordable for many U.S. history classroom teachers.

Many teachers felt comfortable with the content knowledge and they would like to have time to develop strategies to teach students how to research, think, and write like a historian. The teachers’ sentiments were reflected in a 2013 report on the current state of the Massachusetts History and Social Science curriculum framework, authors Lewis and Stotsky (2013) argued that there are few professional development opportunities that can effectively link content and pedagogy.
Previous findings of the case study revealed that the core concepts of learning for historical understanding—i.e., agency, evidence, inquiry, significance, causality, continuity and change—have enabled students acquire and practice skills to become active investigators and not passive learners consuming history content information (Stoskopf & Bermudez, 2008). The local U.S. history curriculum has great potential for raising student interest level and motivation in learning for historical understanding by making sure U.S. history content standards are applicable and relevant in students’ lives; increasing attention and participation in class activities and discussions, thus improving higher order cognitive skills that will prepare them for college, career, and civic life (Stearns, 1998; Klein, 1999; Anders & Stotsky, 2012). It would behoove public schools to recognize the value and importance of U.S. history as an academic core subject and continue sustaining a guaranteed and viable U.S. history curriculum equal to the “high stakes” tested subjects of English Language Arts, mathematics, and science.

**Summary of the Findings**

Historical understanding is the sum of history content information, its relationships to larger historical context, and the significant meanings to the present-day world (Seixas, 1993; Gardner & Boix Mansilla, 2000; Bain, 2003; Stoskopf & Bermudez, 2008; Wineburg, 2001; Van Drie & Van Boxtel, 2007). The U.S. history curriculum can prove to be very powerful to student learning when it incorporates the core concepts of historical understanding. The core concepts of historical understanding have enabled history content to appear or become interesting and relevant, enabling students to engage with the content to develop a deep understanding of the historical past. The teachers in the case study have constantly explored and planned ways to make history content as interesting and relevant possible by instilling the
human element in the subject matter and by creating opportunities for students to use their higher order cognitive skills as well as apply technological and communication skills that are becoming necessary in college and the world of work today.

The teachers recognized that not all their students are interested in U.S. history and so making the content as interesting and relevant as possible are most critical if students are to become engaged in their learning and develop a sufficient, if not deep, understanding of the historical past. They looked at the state’s curriculum framework and noted how extensive the list of content topics that students are expected to learn and know; to the point the curriculum has included too many topics and facts to address with any meaningful depth. They also looked at the Common Core State Standards related to U.S. history and saw how the standards focused too much on critical thinking skills that prepare students for college and career and treated U.S. history content no more than as a side note. Despite the comprehensiveness of the two documents, the teachers were challenged as to finding balance in fulfilling the expectations and at the same time finding ways for their students to stay engaged in learning U.S. history.

Realistically, the U.S. history content standards in the state’s History and Social Science curriculum framework and the standards outlined in the Common Core State Standards for Literacy in History and Social Studies are fixed or grounded and it would take years to make recommendations for change. However, such documents are merely frameworks or blueprints, even though some local districts have adopted them as the official U.S. history curriculum. Thus, the key lies in the local school district’s U.S. history curriculum. Through professional development and collaboration, U.S. history teachers can
incorporate and imbed the core concepts of historical understanding in its U.S. history curriculum while staying aligned to the state frameworks and the Common Core.

**Critical Implications for practice**

The teachers in the case study have developed and planned instructional activities and practices that fostered active engagement in learning U.S. history by making content as interesting and relevant as possible. Teachers did not want their students to memorize the content; they wanted students to know why learning the content were significant and important in their lives. Teachers also wanted their students to learn how to acquire life-long learning skills that will help prepare them for college, career, and civic life. The teachers looked for teachable moments and learning opportunities for students that would engage their students to continue learning for historical understanding.

The original intent of the U.S. history curriculum was to provide history content that would help prepare high school students become productive American adult citizens (Mehlinger, 1988; National Council for the Social Studies, 1992; Bain, 2005). However, several research studies and articles have described the general scope and nature of the high school U.S. history curriculum as disconnected and unclear with lofty expectations (Mehlinger, 1988; Jackson, 1989; Duea, 1995; Zenger & Zenger, 2002; McGuire, 2007, St. Jarre, 2008: Schmoker, 2011). The problem rested in enabling high school students to learn a “long laundry list” of topics, facts, dates, places, people, and events in U.S. history and graduate from high school with a basic knowledge and understanding of the nation’s past.

While many research studies have focused largely on instructional activities and practices, the findings of this case study have led me to focus on the general scope and nature
of the U.S. history curriculum. It should be noted that “active engagement” does not particularly refer to activities where students are collaborating with one another through simulated activities, mock trials and debates, or engaging in Socratic-like round discussions, or constantly moving around in the classroom; students can be actively engaged with history content through a lecture or from reading text independently. E.D. Hirsch (1996) have long argued that learning for historical understanding requires extensive content information, which have been diluted because schools have overly emphasized on the Deweyan “learning by doing” approach in the classrooms. Many teachers in the case study found, though, that instructional activities and practices that balance history content knowledge, the core concepts of historical understanding, and tools for learning have worked extremely well for their students.

The teachers in the case study insisted on a U.S. history curriculum document that balances U.S. history content, core concepts of historical understanding, and the available tools and resources to support student learning. The local school district’s U.S. history curriculum has been the primary curriculum document that guided teachers to plan their U.S. history classes. The document aligned the U.S. history content learning standards as outlined in the state’s History and Social Science Curriculum Framework (2003) and the literacy in history and social studies standards as outlined in the Common Core State Standards (2009), and identified specific learning tools and resources that are available in the school district. The document was also helpful in specifying meaningful outcomes and assessment tools to measure students’ content knowledge and understanding of U.S. history content. The curriculum document was designed so that all stakeholders—e.g., students, teachers, school
administrators, parents, etc.—could easily and clearly identify the learning outcomes in U.S. history that all students were expected to learn and know upon graduating from high school.

The teachers wanted to have a U.S. history curriculum that incorporated core concepts of historical understanding, which would enable students to get interested in learning U.S. history content and find relevance in their lives. They wanted their students to appreciate the human element imbedded in topics throughout the U.S. history curriculum by capturing the lived personalities of notable figures of the past through role-playing in mock trials and mock debates or having students conduct research on biographies of fascinating historical figures and individuals who once lived long ago. The findings of the case study revealed that the core concepts of historical understanding enabled high school students to develop a deep understanding of the historical past. The teachers also wanted a U.S. history curriculum that will allow students to be active investigators and contributors to learning the subject matter rather than simply a consumer of history content information. The teachers preferred their students to take an involved role in the learning process not only through simulation activities or Socratic-like discussions, but also through lectures, independent reading and research, and reflection.

**Limitations of the study**

Since I was unable to conduct and facilitate small student focus groups as described in Chapter Three, I was unable to include high school students’ attitudes and insights on learning for historical understanding. To address this gap in my research, I was able to document students’ activities and works through classroom observations with the expressed consent from the Superintendent of Schools and the teachers and students in the U.S. history
classes observed. The case study was small in scope; two public high schools, a total of four teachers were interviewed, and three U.S. history classrooms were observed for three to four consecutive days. I attempted to add a third high school, which would have provided additional data, and perhaps would have provided me with an opportunity to conduct and facilitate small student focus groups. Unfortunately, due to timing and scheduling conflicts, I was unable to include a third research site to the case study.

**Need for further study**

Additional research is needed to explore ways in which high school students approach to attain historical understanding in their U.S. history classes. Small student focus groups would provide. Since the focus of this case study research is on student learning for historical understanding, data on students’ experience in learning U.S. history in the classroom as well as outside the classroom would be extremely valuable. Once a teacher is able to identify what his or her students currently know and the ways in which they learn the material, the teacher can tailor instruction in order for students to acquire new knowledge and understanding in U.S. history (Bransford et al., 2000; DuFour et al., 2008).

While the research data gathered and analyzed have already provided a wealth of information to develop the major findings in the study, students’ experiences and insights on how they incorporate the core concepts of learning for historical understanding would provide additional pertinent information that will help teachers, administrators, and education leaders to develop effective policies on history education, instructional practices fostering historical understanding, and new curriculum resources to support learning for historical understanding. How much do students remember when they learned through lecture and reading from a
textbook and how much do they remember when they learned through active and engaging exercises that fosters core concepts of learning for historical understanding? I suggest future mixed methods research that includes common constructed response assessments that specifically look for students’ ability to make meaning of historical topics learned months earlier through engaging activities that fostered historical understanding.

Another topic of interest as a result from this case study is a pursuing an action research project by having public high school teachers design standards-based curriculum to expand opportunities fostering historical understanding through the professional collaboration. Schools must be able to provide common planning time for U.S. history teachers to collaborate on a regular and frequent basis. Additionally, U.S. history classrooms serve as excellent research sites to explore ways to enhance learning for understanding (Harling, 2002; Creswell, 2003; Yin, 2009). In addition to designing curriculum, teachers should also develop formative and summative assessments in U.S. history that can inform teachers to create engaging activities that fosters learning for historical understanding. People learn best by doing (DuFour et al., 2008).

Conclusion

This qualitative research case study examined contextual conditions that have allowed the fulfillment of student learning for historical understanding in honors and college preparatory level U.S. history classes in two public high schools in eastern Massachusetts. The research data gathered and analyzed revealed findings, while appearing obvious, that shed light to how educators can enhance their abilities to create engaging and meaningful learning opportunities for historical understanding in their classrooms. Overall, the findings
of this case study shifts the central focus in the U.S. history classroom from teacher to student: by allowing high school students the ability to explore, approach, and discover real topics in U.S. history that are most meaningful and relevant in their lives; by having the opportunity to express, voice, and convey their processes of critical analyses and thoughts, and demonstrate mastery of content knowledge of topics and issues that define the American historical narrative; and by helping students identify and take advantage of their current strengths and talents to enrich their existing current knowledge and skills to construct new understandings, ideas, and intellectual knowledge that will enable them to achieve and succeed in the world of college, work, and civic life.

Pursuing this qualitative case study research has strengthened my abilities in identifying and exploring a real problem of educational practice particularly in the areas of curriculum and pedagogy, reviewing academic research and literatures to augment my existing knowledge of the problem and dismiss any preconceived assumptions and biases, and collecting and analyzing data from the research. I have been able to utilize this approach to address other problems of practice in my field, and guide my colleagues and peers, my students, and even my superiors on implementing sound research methodologies to inform and enhance our practices as professional practitioners in public education.
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Appendix A
Participants Memorandum of Understanding Document

Northeastern University, College of Professional Studies, Department of Education

Name of Investigators: Gorman Lee, Doctoral Student, Dr. Jane Lohmann, Principal Investigator
Title of Project: Enhancing Student Learning for Historical Understanding

Request for Consent to Participate in a Research Case Study

March 1, 2013

Dear potential participants,

The goal of this research case study is to observe and collect information on ways in which high school students demonstrate effective learning for historical understanding in U.S. history classes. By agreeing to participate in this study, you maintain that:

1. You are currently teaching in a high school Honors or College Preparatory level U.S. History course at the research site.
2. You have been teaching in a regular education classroom at the research site for at least 5 years.
3. You have consistently incorporated the core concepts of learning for historical understanding in your instructional practice.

As a potential participant in this study, you will be asked to:

1. Participate in three (3) in-depth, semi-structured, confidential, audio or video recorded ninety-minute interviews to be held at the research site after the regular school day.
2. Share your experiences related to effective student learning for historical understanding.
3. Allow the primary researcher to observe complete units in two of your U.S. history classes.
4. Allow the primary researcher to collect copies of instructional handouts and worksheets, and anonymous completed students’ works pertaining to the units observed.
5. Review my interpretations of your responses to ensure that you and your points of view have been accurately represented in the study.

Participation in this study is completely voluntary. You, as participant, may decline to answer any of the interview questions during the interview and may withdraw from the study at any time with no questions asked. All digital recordings will be deleted and destroyed immediately upon the completion of data transcription and analysis.

There is no compensation for participating in this case study. However, you may find participating in this study as a great opportunity to speak openly about the types of professional development training you would like to see offered, and the types of curriculum and instructional materials you would like to incorporate in the classroom.

Complete confidentiality at the local level cannot be guaranteed. Part of this approval process includes the disclosure of the school district and site, Headmaster, the Superintendent and Assistant Superintendent, the Principal Investigator of this study, Dr. Jane Lohmann, and the IRB approval department at Northeastern University in Boston, Massachusetts. However, the primary researcher will not identify any of the participants by name or by any other identifiable factor in the draft and final publications of the case study project. The names of the school district and site will also not be
disclosed in the publication to ensure that readers will not be able to identify you as a participant or
know the exact location of the study.

Your participation in the interviews, classroom observations, and sharing of documentary evidences
for this case study will not be reflected in any informal and formal evaluations on your performance or
your role as an employee at the research site. All data gathered specifically for this case study will
remain completely separate from your professional profile. This study will not have any effects to you
or your evaluation as an employee.

If you have any concerns or questions regarding this memorandum of understanding, do not hesitate
to contact Gorman Lee at 857-288-9996. You may leave a confidential voice message at 617-297-
2339, or email Gorman at glee0524@gmail.com. Concerns and questions may also be directed to the
Principal Investigator, Dr. Jane Lohmann, by phone 617-756-3237 or email her at
j.lohmann@neu.edu. For information or answers to any questions you have regarding your rights as a
participant, contact Nan Regina, Director, Human Subject Research Protection, 960 Renaissance
Park, Northeastern University, Boston, Massachusetts 02115, at 617-373-4588 or email her at
jrb@neu.edu.

Please indicate your consent to the interview, observation, documentary evidence gathering, and
member checking by signing below:

_______________________________  _______________________
Signature of prospective research participant  Date

_______________________________
Please print name

_______________________________  _______________________
Primary researcher  Date

_______________________________
Please print name
Appendix B-1
Teacher First Interview Protocol

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<th>Interviewee:</th>
<th>Interviewer:</th>
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<td>Position or Title of Interviewee:</td>
<td>Location of Interview:</td>
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<tr>
<td>Date of Interview:</td>
<td>Time of Interview:</td>
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Thank you for taking the time to participate in this research study on student learning for historical understanding.

As you know, this is the first of three in-depth ninety-minute interviews. The goal for this interview session is to give you the opportunity to talk about your first encounter and experiences in learning United States history, and your experiences in learning to become a United States history teacher. The questions are open-ended so feel free to share as much information as you like. This interview is being recorded, and the information will be used as the basis of a research case study report. Your name and school will not be identified in the draft and final publications of this study. No identifying information will be used. All of your responses will be kept confidential.

1. Can you describe the moment you first studied or learned United States history?

2. What attracted you to learning United States history? Do you continue to feel this way today?

3. What particular time period in United States history fascinates you the most? The least?

4. Can you describe the moment when you felt great joy while learning United States history?

5. Can you describe the moment when you felt great frustration while learning United States history?

6. Can you describe a time you overcame a challenge while learning United States history?

7. What did you enjoy most, as a student, from your high school U.S. history class?

8. What did you enjoy most, as a student, from your undergraduate college history courses?

9. Did you ever thought about becoming a United States history teacher before or upon entering college (as an undergrad)?

10. When did you know you wanted to become a United States history teacher?
11. Please describe your educational training in becoming a United States history teacher.

12. How would you describe your experience in learning to become a United States history teacher?

13. Do you have or have you had a mentor? [If the answer is no, then proceed to question 14]

14. How would you describe your mentor?

15. What is the one thing you appreciate the most in learning from your mentor?

16. Do you currently remain in touch with your mentor? How often do you meet or speak to your mentor? What are the occasions for interacting?

17. [If no mentor] In what way do you think you would have benefited from a mentor?

18. Is there anything else you would like to add?
Appendix B-2
Teacher Second Interview Protocol

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<th>Interviewee:</th>
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<td>Position or Title of Interviewee:</td>
<td>Location of Interview:</td>
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<td>Date of Interview:</td>
<td>Time of Interview:</td>
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Thank you for taking the time to participate in this research study on student learning for historical understanding.

This is the second of three in-depth ninety-minute interviews. The goal for this interview session is to give you the opportunity to talk about your experiences with student learning for historical understanding as well as your experiences in teaching United States history. The questions are open-ended, so feel free to share as much information as you like. This interview is being recorded, and the information will be used as the basis of a research case study report. Your name and school will not be identified in the draft and final publications of this study. No identifying information will be used. All of your responses will be kept confidential.

1. Before we begin our second interview, is there anything you would like to share or clarify from the previous interview?

2. How long have you been teaching United States history?

3. Can you describe a U.S. history lesson that you observed in which you watched students demonstrating deep understanding of an historical event, concept, or issue?

4. What do you remember about the very first time you taught United States history in the classroom, either as a student teacher or as a teacher? Do you remember how you felt that day?

5. Can you describe a U.S. history lesson that you planned and implemented in the classroom in which you watched your students demonstrating deep understanding of an historical event, concept, or issue?

6. Can you describe what your students were doing, or how they were behaving, when they were exhibiting deep understanding of an historical event, concept, or issue in the classroom?

7. Can you describe the moment when a student discovered a significant historical concept in class? What was the student doing at the time of discovery?

8. Do you notice or have you noticed any common styles of learning that students utilize or employ while studying and learning United States history in your classes each year?
9. What do you generally like about the students in your United States history classes?

10. What do you generally find challenging about the students in your United States history classes?

11. Generally speaking, what do you find challenging in teaching United States history in a (any) public high school today?

12. Generally speaking, what do you see as major challenges for high school students in learning United States history today?

13. How would you rate the U.S. history textbook used in your class? What do you generally like and dislike about the textbook?

14. On a scale from very favorable, indifferent, very unfavorable, how do your students respond to using the textbook?

15. How would you describe the level of support from your district and building administrators to having and maintaining a viable and rigorous United States history curriculum in your school district?

16. What are your general thoughts on the U.S. history content learning standards outlined in the 2003 Massachusetts History and Social Science Curriculum Framework?

17. What are your general thoughts on the Common Core reading and writing standards for literacy in History and Social Studies?

18. What are your thoughts or feelings about U.S. history not included in the Massachusetts Comprehensive Assessment System (MCAS)?

19. Are you or have you been a mentor to a prospective United States history teacher? If so, how would you define your role as a mentor?

20. Is there anything else you would like to add?
Appendix B-3
Teacher Third Interview Protocol

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<th>Interviewee:</th>
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<td>Location of Interview:</td>
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<td>Date of Interview:</td>
<td>Time of Interview:</td>
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Thank you for taking the time to participate in this research study on student learning for historical understanding.

This is the third, and final, of three in-depth ninety-minute interviews. The goal for this interview session is to give you the opportunity to reflect upon your experiences as both a student learning United States history and a teacher teaching United States history, and how your lived experiences have shaped your insights on the necessities and challenges in student learning for historical understanding in today’s classrooms. The questions are open-ended, so feel free to share as much information as you like. This interview is being recorded, and the information will be used as the basis of a research case study report. Your name and school will not be identified in the draft and final publications of this study. No identifying information will be used. All of your responses will be kept confidential.

1. Before we begin our third and final interview, is there anything you would like to share or clarify from the previous two interviews?

2. Do you find your students learning United States history more challenging today than when you were a high school student learning United States history, or is it the opposite?

3. Given what you have said in earlier interviews, have your perceptions or attitudes toward student learning for understanding changed in any way? If yes, how?

4. Reflecting upon your experiences as a professional United States history classroom teacher, what would you recommend colleges and universities to consider changing or improving in regards to training prospective United States history teachers?

5. Now, as a classroom teacher, how would you describe your continued or ongoing level of interest in learning United States history compared to when you were a high school or undergraduate student?

6. If you had to come up with one statement to describe your experiences in teaching the key core concepts of learning for historical understanding, what would it be and why?

7. Is there anything else you would like to add?
## Appendix C
Classroom Observational Documentation Protocol

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<th>Class:</th>
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**Unit objective:**

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<th>Lesson objective(s):</th>
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**TEACHER**

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<td>00:11 – 00:20</td>
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<td>00:21 – 00:40</td>
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<td>00:41 – 00:49</td>
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**STUDENT**

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Appendix D
Student Focus Group Discussion Protocol

Informed Consent: Parent Consent for Student Focus Group

Purpose

The primary researcher, Gorman Lee, is requesting permission for your child to participate in the data collection for a case study examining how students demonstrate effective learning for historical understanding. The purpose of the study is to explore the experiences of high school students while learning United States history in high school classrooms today in order to assess the quality of (1) national, state, and local curriculum guidelines in United States history, (2) design and practices of instruction in United States history classrooms, (3) curriculum resource materials including textbooks, print and online sources, and media, (4) teacher professional development opportunities. This case study will involve multiple data collection strategies.

Students will be asked to participate in focus groups. Your child will engage in a short learning activity, which involves using skills to obtain a strong understanding in United States history, and then be asked about what they experienced during the process of learning for historical understanding. The focus groups are designed to last no more than one hour.

Risks and Discomfort

There are no considerable risks other than your child feeling compelled to take part in the focus group activity and discussion. You should know that your child’s participation in the study is entirely voluntary, and that your child may withdraw from the focus group at any time without any questions asked and without penalty.

Benefits

Your child’s participation in this case study will contribute to improving the learning experiences for all students learning United States history in U.S. public high school classrooms today.

Freedom to Withdraw

Your child’s participation in this case study is completely voluntary. Your child may pass on any question that is asked and your child may withdraw from the study at any time.

Privacy and Confidentiality

Northeastern University College of Professional Studies Department of Education follows the confidentiality and data protection requirements of the Institutional Review Board (IRB) and Human Subject Research Protection. Responses to this data collection will be used for research purposes only. The reports prepared for this case study will summarize findings across the sample and will not identify specific district, school, or individual. No information that identifies your child, your child’s school, or your child’s district to anyone outside the study team will be provided, except as required by law.

More Information

If you have any concerns or questions regarding the research case study and/or this informed consent memorandum, do not hesitate to contact Gorman Lee at 857-288-9996. You may leave a confidential
voice message at 617-297-2339, or email Gorman at glee0524@gmail.com. Concerns and questions may also be directed to the Principal Investigator, Dr. Jane Lohmann, by phone 617-756-3237 or email her at j.lohmann@neu.edu. For information or answers to any questions you have regarding your rights as a participant, contact Nan Regina, Director, Human Subject Research Protection, 960 Renaissance Park, Northeastern University, Boston, Massachusetts 02115, at 617-373-4588 or email her at jrb@neu.edu.

Informed Consent

I have read the above information. I have asked questions and received answers. I consent to allow my child to participate in the study.

_____________________________________________  ___________________________
Parent’s signature                                      Date

_____________________________________________
Please print name

_____________________________________________
Please print child’s name

_____________________________________________  ___________________________
Primary researcher                                      Date

_____________________________________________
Please print name
Thank you for taking some of your time to participate in this focus group for this research case study. This focus group should last approximately an hour.

The primary purpose and goal of this focus group is to learn about and understand your experiences in learning United States history. The questions I will ask you are simply to keep the discussion focused throughout the time we have together, but it is meant to be an informal, open discussion amongst everyone. This interview is being recorded, and the information will be used as the basis of a research case study report.

Anything said in this focus group will be held in strict confidence. The information you provide will be combined with that of other focus groups, and all analyses will be written in summary form. Your name and school will not be identified in the draft and final publications of this study. No identifying information will be used. Everything said in this focus group will be kept confidential.

The activity
In this activity, as a group, you will examine eight (8) images and photographs.

You will need to find clues in each of the images, and then determine the chronological order of the images from earliest to most recent.

Using the Post It notes, jot down the clues that helped you determine the chronological order of the images.

Once you have placed the images in chronological order and have jotted down the clues for each image, using the blank white sheet of paper, write a general statement that describes what these eight images collectively say about our nation’s history. In other words, what were the images representing?

After the activity
1. What is your overall opinion of the activity? (i.e., did you like it, hate it, didn’t care for it, etc.?)
2. Can you summarize how and what you did in this activity?
3. Could you describe what was going through your mind when you were being instructed on what to do for this activity?
4. Could you describe the process you took, step by step, in performing the tasks in this activity?
5. Did you rely on any prior historical knowledge or what you have already learned before to help you perform the tasks in this activity, or did you just use whatever knowledge you were gaining while performing the tasks in this activity?

6. How did you feel throughout the activity? (Depending on the response, follow up by asking… What was so enjoyable about it? or What was so frustrating about it? What made you feel indifferent about it?)

7. Did you, at any point, feel personally connected with the topic while performing the tasks in this activity?

8. In this activity, you worked as a group or team. How did you feel working as a group or team?

9. How would you feel if you were performing this task as an individual?

10. What did you think of the instructions? Were the instructions helpful or could the instructions been presented in a different way? What would have made the instructions clearer?

11. What did you think of the primary sources that were used in the activity? What could have been used to make this activity better?

12. Did you find the overall experience a meaningful experience?

13. Did you find the activity worthwhile in learning about United States history?

14. Do you think by doing this activity, you learned something about the Civil Rights Movement? Why or why not?

15. Do you think if you had read about and studied the Civil Rights Movement prior to this activity would have helped you in the activity, or do you think this activity gives you a better understanding of the Civil Rights Movement if a reading assignment on the Civil Rights Movement were assigned to you?

16. Would you recommend this activity to other students? Why or why not?

17. Is there anything else you would like to tell us about your experience with this activity?

Thank you very much for your time. I promise to use the information you have provided to improve how we study and learn United States history!
Appendix E
Documentary Evidence Analysis Protocol

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<th>Class:</th>
<th>Block Period:</th>
<th>Teacher:</th>
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<td>Date of Observation:</td>
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☐ Teacher agrees to share this document or artifact for the purpose of this research case study and understands this and all other documents will be kept confidential. ______

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<thead>
<tr>
<th>Type of Document:</th>
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<tbody>
<tr>
<td>☐ Completed student work</td>
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<tr>
<td>☐ Unit or lesson plan; plan book</td>
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<tr>
<td>☐ Handout or worksheet for students</td>
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<td>☐ Other (specify):</td>
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Describe main purpose or use of document:

Evidence of core concept of learning for historical understanding:

Learning objective based on (verbal or written) directions, instructions, etc.:

Evidence of student learning for historical understanding:
# Appendix F
## Memoing Protocol

<table>
<thead>
<tr>
<th>Date:</th>
<th>Time:</th>
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- ☐ Teacher Interview
- ☐ Student Focus Group
- ☐ Classroom Observation
- ☐ Documentary Evidence

### Notes:

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<th>Reflections:</th>
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