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The Wiley International Handbook of History Teaching and Learning

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Foreword: History Educators in a New Era

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Scott Metzger and Lauren Harris's volume is an extraordinary testament to the robust growth and development of an international field that existed only in the most embryonic form three decades ago. The chapters herein are evidence of the remarkable number and quality of its scholars, publications, programs, and projects. In recent years, a broad, international dialogue has developed, in part based on earlier, more insular movements in Germany, the United Kingdom, the Netherlands, the United States, and elsewhere. Networks, communications, and conferences—including the American Educational Research Association's (AERA) Teaching History special interest group—have vastly enlarged the scope of history education research, fostered its nuance, and facilitated its depth. From this point forward, this collection of reviews will be both the authoritative survey of where the field has been and the launching pad for what should be coming next. It is appearing, however, at a dangerous moment, globally, for the liberal arts, education, and research, for democratic values generally, and for history and history education specifically.

The deep forces of destabilization include increasingly polarized wealth, migrations from desiccated equatorial regions of the globe, and new modes of communication which are increasingly rapid, pervasive, dispersed, accessible, and open to manipulation. Perversely, ascendant ideologies foster public policies that may promote the acceleration of all of these trends.

While the threat to liberal traditions is global, nowhere is it more palpable than in the US after the surprise election of Donald Trump. Does the US represent just an endpoint on a global continuum, or—with its exponential supremacy in military expenditures, its outlier status from health care to gun ownership, and its vastly disproportionate concentration of the world's wealth—is it, in fact, exceptional? In either case, Trump's inauguration speech provided a benchmark for the wider populist phenomenon. "From this day forward," he promised, "a new vision will govern our land" (Inaugural Address, 2017).

Of course, a diktat does not make the past vanish. On the other hand, Trump's advent can be seen as the beginning of a new era in the US and beyond. Trump's

radical proposals and erratic *modus operandi* challenged domestic institutions of governance, the press, education, the economy, environmental protection, healthcare, and welfare—as well as long-term relative international stability achieved through post-World War II defense alliances and trade pacts. Moreover, his words appeared to resonate among populist politicians with similar proclivities in other historically democratic nations. Le Pen in France, Farage in the UK, and Wilders in the Netherlands challenged the progressive consensus that held the European Union together. On the borders of Europe, states that since the end of the Cold War appeared to be working toward inclusion in a larger, open, Western democratic project have embraced nationalist autocracy under the leadership of Erdogan in Turkey and Putin in Russia.

On the other hand, Trump's inaugural promise to forget the past and look only toward the future was, in some ways, nothing new. The idea that we are living in an age when the future will differ from what came before us is the condition of modernity: All that is solid, as Marx famously wrote, melts into air. From the late 18th century, in the words of Reinhard Koselleck (1985), "it became a rule that all previous experience might not count against the possible otherness of the future. The future would be different from the past, and better, to boot" (p. 267; see also Clark and Grever in Chapter 7).

François Hartog (2015) takes a further step, offering an ongoing "crisis of the present" as the defining characteristic of the era since the fall of the Berlin Wall and the end of the Soviet Union, where "the distance between the space of experience and the horizon of expectation [has] been stretched to its limit, to breaking point … with the result that the production of historical time seems to be suspended" (p. 17). Writing originally in 2003, Hartog anticipated the unease of our own moment.

Many of the modern, liberal traditions that have been challenged by Trump and his fellow travelers were recently so fundamental to the generations living now that we barely gave them a passing thought. Academics hardly needed to rally to defend the idea of *truth* because the only threat was from some of our own poststructuralist provocateurs, delivered in prose so tortured that it had little apparent impact on the broader public sphere. When the Trump administration began in 2017 with a flurry of unsubstantiated allegations and "alternative facts" rhetoric, the game changed and the stakes were raised.

The implications for history education and its scholars, internationally, are profound. If we need to revisit our stances on the concept of truth, so too do we need to re-examine those on research and knowledge, interpretation and evidence, community and nation, identity and difference, and citizenship and solidarity.

It is quite unremarkable to note the prominence in recent decades of "considerations of the role of sociocultural identity markers such as *positionality* and *situatedness* in knowledge production" (Crocco in Chapter 13, italics in the original; see also Seixas, 2000, pp. 28–29). But where does positionality leave knowledge, in relation to the purveyor of "alternative facts" who claims they are the truth from their own position in Memphis or Moscow? Of course, highlighting people's varieties of experience and belief, and differences in relation to power and privilege, is at the core of the social, educational, and historical sciences. But

building *knowledge* must ultimately emerge through dialogue, debate, and discussion as a common project, conducted on a common basis of civility and with a shared respect for evidence. In the current climate, we cannot afford to toy with separate islands of identity-based theory, research methods, "epistemologies," or even "ontologies." Notions such as women's ways of knowing and multicultural epistemologies—to the extent that they close down dialogue and debate or, conversely, open up "anything goes" as long as it is deeply held or strongly believed—pose new dangers.

The problem of teaching about historical interpretations, similarly, needs to be examined through a different lens in this political environment. Most history education scholars in recent decades, myself included, have seen a central challenge in destabilizing the notion that what is in the textbook—or any contemporary account—is *the* story of what happened. We have focused on the categorical difference between interpretations of the past and the past itself. That difference has not vanished nor has the importance of teaching it, but the burden is upended. That is, our central challenge will have to focus on helping students to understand the *limits* of interpretation, the *constraints* that bind what we say to the evidence that we have, and the importance of defending interpretations that are supported by the weight of evidence, not as just one among many possible ways of seeing things.

Insofar as contemporary political, economic, and social conditions start to shift popular culture's grand narratives of nation and world civilizations, there are further implications for history educators. The triumph of Trump, the ballot on Brexit, and the popularity of Le Pen have made visible a tectonic shift in popular narrative templates (to use Wertsch's, 2004, term). As with geology, the hidden forces of change have long been at work beneath the surface, building pressure. The earthquake that is Trump rattled the world with a dire picture of Americans wracked by pain, carnage, depletion, disrepair, and decay, robbed by post-War allies, and impoverished by parasites within. Le Pen and Wilders imagined their countries overrun and cultures besieged by non-White hordes. Those pictures apparently resonated with a large number of their fellow citizens. How will their populist vision affect the academic history and history education communities, whose scholars have focused on the flaws and cracks in the grand narratives: in the US, imperialism, the economic foundations of slavery, genocidal policies toward Native Americans, the persistence of Jim Crow since Reconstruction, the growth of economic inequality since the 1970s; and in Europe, the history of colonialism and, varying with national setting, collusion with Nazis during the Holocaust? Perhaps we will find ourselves countering nationalist distortions by a new appreciation for a (qualified) narrative—open, of course, to reasoned critique—of progressive opportunity and open democracy that long have been the staple of school teaching and textbooks.

Many history education researchers have focused on students' gender, sexual, and racialized identities as fundamental elements in students' understanding of the past. Sociocultural theory, in the context of history education research, examines connections between a community's collective memory and students' construction of their own identities. *Vice versa*, it examines how students' social location shapes their historical understanding. It has thus provided explanations

for many minority students' alienation from school history and prescriptions for a revised history curriculum that could foster more effectively their processes of historical orientation. Our focus on the concept of historical significance has similarly highlighted the differences that arise in various identity-groups' understandings of the past. Events and people who occupy a key role in the collective memory of Los Angeles Latinos sit in the margins of that of the descendants of blueblood Bostonians. In our new circumstances, history educators may logically shift their focus to look more forcefully toward fostering the larger narratives that will pull these memories into focus with each other and build toward common understandings. Again, this is not a new idea, but one that will need renewed attention.

Mark Lilla (2016) has argued that the politics of identity and consciousness of diversity have displaced liberals' other concerns with class, war, the economy, and the environment (i.e., the common good). He suggests that liberal teachers should "refocus attention on their main political responsibility in a democracy: to form committed citizens aware of their system of government and the major forces and events in our history" (Lilla, 2016). David Frum (2017) offers further rationale for such a refocus, in view of the looming threat of arbitrary, autocratic orders in the US and Europe. He contrasts the personalized nature of autocratic power with the respect for ongoing institutions, traditional norms, and the rule of law that provide the basis for managing power relationships and reform in democratic nation-states. As history educators, we have shaped our research agendas and policy prescriptions in an environment where we could largely take those institutional foundations for granted. Accordingly, our work has tended to focus on recognition of historically marginalized communities and movements that challenged the exercise of state power. While these continue to be crucial, they now need to be set within the context of the glaring erosion of the democratic institutions and values that have made reform possible.

History educators will thus have to amend our potential contributions to the new political culture. This does not mean shuffling systemic racism, colonialism, homophobia, and gender inequality back into obscurity much less silence, but it does bring with it a call to remember the promises and obligations of democratic rule, the achievements of a peaceful post-WWII European system, the importance of institutional norms, and, not least, the moral virtues and qualities of character that enable both good leadership and active participation in a democratic state. Most of us have not foregrounded these issues, which were prominent in my own "citizenship education" in the 1950s and 1960s: Now we must. The new California History–Social Science Framework exemplifies the new citizenship education:

> Students learn the kind of behavior that is necessary for the functioning of a democratic society in which everyone's fundamental human rights are respected.... They should learn how to select leaders and how to resolve disputes rationally. They should learn about the value of due process in dealing with infractions, and they should learn to respect the rights of the minority.... Students will gain an appreciation of how necessary an informed electorate is in making possible a successful democracy. (Slutsky 2017, p. 7, quoting from the Framework)

Where we might once have dismissed such language as bland bromides, we can no longer assume these understandings as an unspoken baseline.

David Brooks (2017) applied Tönnies's bifurcation, *gemeinschaft/gesellschaft*, to the conundrum of the new populism. "All across the world," Brooks wrote,

> we have masses of voters who live in a world of *gemeinschaft*: where relationships are personal, organic and fused by particular affections. These people define their loyalty to community, faith and nation in personal, in-the-gut sort of ways. But we have a leadership class and an experience of globalization that is from the world of *gesellschaft*: where systems are impersonal, rule based, abstract, indirect and formal.

Into this gap stepped Trump, "the ultimate *gemeinschaft* man" (in Brooks's words), making appointments more on the basis of personal loyalty and relationship than on relevant expertise or experience, as he took control of the levers of the world's most powerful military, administrative, and bureaucratic (*gesellschaft*) enterprise.

But historians and history education scholars have similarly welcomed the introduction of the personal and the local in recent years. In the large-scale surveys of adults' interests in and uses of history, researchers remarked on people's engagement with personal histories and proximate heritage (Rosenzweig & Thelen, 1998; Ashton & Hamilton, 2003; Conrad et al., 2013). These people supported a rationale for history education and museology that was "familial, experiential, and tactile" (in the words of Clark and Grever in Chapter 7), one that pulled toward the local, personal, and place-based—and away from concerns with states, institutions, and the *longue durée*.

Ironically, there is a peculiar parallel here to the populist denigration of distant experts and cosmopolitan elites. The lineage from social history through the "cultural turn" to memory studies has a populist trajectory: The past belongs not just to expertly trained historians but also, in Carl Becker's term, to "everyman." Similarly, post-Foucauldian academics had a tendency to see historiography as no more than one among many ways to understand the past, the use of historical sources just another kind of myth, and the use of reason just another act of faith, moreover one whose undeserved position of power occluded the rightful voice of the nonexpert, the untrained, and the antiscientific. This position may increasingly become an intellectual indulgence we cannot afford.

Most of the chapters in this volume were drafted before the inauguration of Trump. Nevertheless, there is plenty of language that faces our new world circumstances clearly. Two quick examples will suffice. Goldberg and Savenije (in Chapter 19) advise "in a climate of 'post truth' and mudslinging, of political polarization and delegitimization, it behooves us as educators to uphold a sane, rational, and evidence-based alternative." Margaret Crocco's conclusion (in Chapter 13) is similarly well crafted to integrate our important attention to diversity within a universalist "human condition":

> As a matter of social justice, but equally as a matter of truth-telling, history education would be well served by greater attention to gender and sexuality

> as part of its research agenda so as to illuminate the many facets of the human condition now obscured by the partialities of traditional and limited perspectives on the past too often encountered within history education.

It is much easier for a retired person to question the intellectual stances upon which a career was built. Perhaps what I have written here represents only a subtle change anyway, in the positions I have always defended. Nevertheless, this is a historical moment at which academics and intellectuals need to take stock. Of the liberal national and international order, what is worth defending even if we never felt called upon to defend it before—indeed, even if we built our careers criticizing it?

Will the field of history education write itself into the margins of relevance in this new era, or will it continue to move toward the central place that it deserves? The answer depends, in large part, on the directions taken by those whose work is represented in the pages that follow.

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Introduction: History Education in (and for) a Changing World

Scott Alan Metzger[1] *and Lauren McArthur Harris*[2]

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As Peter Seixas observes in the Foreword, the growth of history education as its own research field over the past three decades is striking. This is due in no small part to pioneering scholars who, in the 1980s and early 1990s, examined teaching, learning, and thinking specifically for history—including Denis Shemilt (1983) and Ros Ashby and Peter Lee (1987) in the United Kingdom; Peter Seixas (1993, 1994) in Canada; and Sam Wineburg, Suzanne Wilson, and Linda Levstik in the United States (Levstik, 1986; Levstik & Pappas, 1987, 1992; Wilson & Wineburg, 1988, 1993; Wineburg, 1991; Wineburg & Wilson, 1988, 1991). After the early 1990s, more researchers—many of whom are cited in the chapters that follow—built on this foundation and expanded the field in new directions. By the turn of the 21st century, the field had developed enough to warrant specialized edited volumes in North America (e.g., Stearns, Seixas, & Wineburg, 2000) and the UK (e.g., Arthur & Phillips, 2000).

The expanding international scope of the field is just as remarkable. Prolific research on history education is being produced by scholars from around the globe, including Australia, Germany, Israel, the Netherlands, Spain, and Sweden. Even more work is being done in other countries and in languages other than English, and future technology should make crossing the language barrier easier. Today scholars around the world contribute to a truly international literature base on history education (Carretero, Berger, & Grever, 2017; Köster, Thünemann, & Zülsdorf-Kersting, 2014).

A central force in the development of this field is the Teaching History Special Interest Group (SIG) of American Educational Research Association (AERA). Formed in 1997 by signatories including Wineburg, Wilson, Seixas, Levstik, and Lee, the Teaching History SIG has been instrumental in cementing history education as a distinct field of scholarly inquiry through the research of its founding members and a whole generation of scholars following them. Conferencing in the US and Canada, the Teaching History SIG has benefited from an influx of international participation in recent years that should continue to grow in the future.

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As former executive officers of AERA's Teaching History SIG, we are honored to have had the opportunity to propose this *International Handbook of History Teaching and Learning* to Wiley and serve as its editors. The project brings together a diverse range of veteran, mid-career, and promising new scholars to review, synthesize, and discuss the research literature on history teaching and learning from the past to the present moment. The product is a comprehensive reference work that we hope will be of service to scholars and students of history education worldwide in the years to come.

History Education in the World (As Seen From a U.S. Perspective)

The growth of this field is even more impressive considering that history has been a widely recognized school subject in most places for only a little over 100 years. While "history" loosely conceived has been in schools at least since the days of primers using historical topics to help students learn to read, or reading Caesar and Cicero to learn Latin, actual study of the past was (at most) a secondary goal. The emergence of historical inquiry as an academic profession in German, British, and North American universities established history as a discipline by the 1870s (see Novick, 1988), which then filtered into the familiar curriculum of common schools by the 1890s. Throughout the 20th century, this conception of history as a school subject spread to other parts of the world influenced by U.S. or Western European systems.

From its early days, history has had to contend with other subjects for instructional time and curricular value, and proponents have had to find some way to present it as useful. Perhaps it should come as little surprise that history education in public schools was connected to nation building virtually from inception. For example, most 19th-century textbooks from the US (particularly after the Civil War) placed great weight on patriotic socialization, with reverence for established political values of U.S. society (Elson, 1964). Whether history as a subject should aim to inculcate patriotism (or "nationalism" as some preferred to call it in the years after the World Wars) became a question of intense debate in the US and other countries during the Cold War era—and perhaps even more so in our current era of globalization.

Educators from the 19th century to the present have advocated other purposes for the teaching of history. There is a long tradition of history for liberal, humanistic, even humanitarian purposes. Proponents of the work of Harold Rugg in the 1930s, then and since, have included history in education for social reconstruction (Riley, 2006). These goals were not always seen as oppositional to patriotic purposes. Nonetheless, since World War II and European decolonization, history curriculum often has been in the political crossfire between liberals and conservatives, revisionists and traditionalists, and the global and the national.

Political debates heated up as educational reform efforts including history curriculum expanded beyond the localized level. In the US, national attention to history education was raised by professional historians participating with Paul Gagnon and the Bradley Commission on History in Schools (1989). In 1989 and

the early 1990s, the National Governors Association's education summits put into motion the standards-based reform (accountability) movement that has come to dominate the educational agenda in the US, as well as other countries. As history standards became, at least in part, a national question, political stakes over "whose history?" would determine the standards led to rancorous arguments in the US involving educational organizations, conservative critics, national media, and even Congress (Symcox, 2002). Political fights over history were not unique to the US—similar "history wars" were waged in Australia during the 1990s and early 2000s (Macintyre & Clark, 2004).

In the aftermath, the Common Core movement in the US (2010–2015) relegated history and social studies to an ancillary role within literacy and writing. It is not clear how many of the 50 states have appetite for renewed political battles that come from trying to revise history content standards. History (and social studies broadly) remains largely untested (or tested without formally counting) in the Common Core environment. Whether this lack of high-stakes testing attention is a good or bad thing—autonomy or irrelevance—is ambiguous for history educators.

In the US and many other countries today, history in schools is at another crossroads. What should history education aim to do for students who are going to be citizens of a national polity but also live in a globalized world and economy, who bring to school their own sociocultural backgrounds and received traditions but who will be interacting with culturally diverse global populations? How this difficult question is addressed in policy unavoidably privileges certain political and cultural values over others. Perhaps as a consequence, history education today is being asked to do a lot of different, at times contending, things. Even within this handbook, we see history education being asked to:

- motivate students for civic engagement and social justice;
- challenge historical stereotypes of and limitations imposed by race, gender, and sexual orientation;
- explicitly include more focus on Black diaspora, Indigenous perspectives, and these peoples' unique historical experiences;
- develop students' historical thinking skills and capacity to understand themselves as historical beings who are shaped by the past and will contribute to the present and future;
- develop in students empathy that allows for understanding different contexts in the past but also caring how the past affects people in the present;
- represent big ideas of global history;
- prepare students to think, read, and write in ways associated with historical scholars;
- engage in evidence-based historical interpretation of causation and significance;
- train students to critique uses of history in media, museums, and cultural sites.

Not all of these goals are in conflict by any means. However, many emphasize quite different elements, even conceptions, of what history is. They certainly do not run the full gamut of what all political stakeholders, to say nothing of parents and students, might want.

Major Themes and Issues in History Education

This handbook is organized around what we see as the major themes and issues predominant in the field of history education over the past 30 years and with an eye to the future. Below we articulate how these themes and issues are grouped in this handbook in order to illustrate why these chapter topics were selected.

Policy, Research, and Societal Contexts of History Education

A useful way to discuss the evolution of the field is by starting with the contexts in which it occurred—the policy environment in which the purposes, curriculum, and materials of history education are decided; changing currents of research methodologies; and socio/political milieu that shapes how history education is implemented in schools and experienced by students. Taken together, these contexts constitute a rich lens for exploring other elements, perspectives, and experiences in history education.

The educational policy environment, both in the US and internationally, has changed radically over the past three decades with the rise of standards-based reforms, accountability testing, and educational outcomes in global competition. History has not been immune to these developments. In Chapter 1, Tim Keirn overviews U.S. experiences with history in school curriculum both prior to and especially since the 1980s. In Chapter 2, Mark Baildon and Suhaimi Afandi offer global perspectives on history education, curriculum, and research through selected countries in Europe and Asia.

Research approaches available to scholars of history education have proliferated considerably since the 1980s. As narrowly behaviorist orientations gave way to alternative psychological techniques, doors opened to the development of new qualitative and, more rarely, quantitative methods, mixed methodologies, methods utilizing technology, and approaches grounded in reform advocacy. In Chapter 3, Terrie Epstein and Cinthia S. Salinas survey research techniques and their purposes in history education.

Conflicts and anxieties in broader society and the political discourses that flow from them inevitably influence school curriculum and educational materials. Since the acceleration of European decolonization and the end of legal segregation in the US in the 1960s, racism and racial tensions have remained among the most persistent and sensitive social issues. Scholars increasingly have called for history education to include more racially diverse perspectives and experiences and attend to the needs of historically marginalized racial identities. In Chapter 4, LaGarrett J. King and Crystal Simmons review critical literature on the treatment of race in history textbooks in the US and Canada. They also offer original content analysis of select Black History textbooks from North America to substantiate their argument for more explicit integration of Black historical experiences into school history curriculum.

Conceptual Constructs of History Education

One of the most important accomplishments of the history education field is the development of robust conceptual constructs for studying and describing what teachers and learners do with history. Rather than just loosely borrowing concept

labels from the historical discipline, researchers of history education have labored to articulate specialized concepts that encompass different modes of cognition, instructional practices, and educational purposes. These terminologies have proven exceptionally powerful for advancing nuanced understanding, but their distinct meanings—what precisely distinguishes each term from the others—are not altogether clear. Different terms have emerged or tend to be used in different parts of the globe. Meanings often overlap.

The chapters in Section II ambitiously address the clarity problem by reviewing worldwide research literature on the field's important conceptual constructs and discerning what elements and features might define them. These efforts should help the field as a whole reach, if not formal definitions, at least recognized distinctions and clearer understandings of what they look like applied to educational practice. In Chapter 5, Stéphane Lévesque and Penney Clark examine what is arguably the field's key construct since the 1980s: *historical thinking*. In chapter 6, Carla van Boxtel and Jannet van Drie discuss *historical reasoning*. In Chapter 7, Anna Clark and Maria Grever explore *historical consciousness*.

These three constructs manifest implications for other psychological, interpretive, and classification categories. Other chapters in this section expand on these constructs to clarify another relevant concept or classification. In Chapter 8, Jason L. Endacott and Sarah Brooks address what in the 21st century is one of the most widely used concept labels in history education: *historical empathy*. In Chapter 9, Kent den Heyer takes on a term that rose to prominence in historiography in the 1990s and analyzes how it applies to history education: *historical agency*. In Chapter 10, Brian Girard and Lauren McArthur Harris look at larger-scale conceptualizations of history beyond the traditional regional or national scale and examine what constitutes world or global history.

Ideologies, Identities, and Group Experiences in History Education

Since the social and intellectual revolutions in the 1960s and 1970s, antiracism, postcolonialism, liberation, and other social justice theories have exerted substantial influence on academia, including historiography and history education. Neo-Marxian/critical-structuralist theories were among the first, predating the 1960s at least in historiography. The postmodern or "literary" turn, which gained prominence in historiography by the 1980s and attracted some scholars in social studies and history education, offered poststructural lenses for critiquing how race, class, sex/gender, and other identities were typically operationalized in schools and curriculum. Since the 1990s, critical race theory has provided a framework for scholarship on racialized experiences in history.

Drawing on these philosophical lenses, a growing body of history education scholarship focuses on nondominant/historically marginalized identities. Critical theory, particularly in conjunction with postmodern/poststructural perspectives, has been a provocative force in the social studies as a whole. In Chapter 11, Avner Segall, Brenda M. Trofanenko, and Adam J. Schmitt survey the influence that critical theory has had on history education and research. Communities of scholars also have formed to argue for history education to more explicitly attend to other identities or group experiences. In Chapter 12, Carla L. Peck reviews the literature on ethnicity and Indigenous identities and

experiences in history education. In Chapter 13, Margaret Smith Crocco draws attention to the literature on sex/gender and sexuality responsive to gay and transgender movements and queer theory.

Considering how to integrate social identities and different groups' historical experiences into curriculum and classroom teaching can be difficult and even potentially painful when the experiences involve brutal violence. The historical experiences of Jews and other victims in the Holocaust are a powerful example. No small number of states/provinces and countries around the world mandate Holocaust education in schools, but teaching the Holocaust can lead to difficult discussions of historical guilt, victimization, ambiguous moral lessons, and uncertain future obligations. In Chapter 14, Sara A. Levy and Maia Sheppard take on the problem of "difficult knowledge" in history education and specifically in regard to the Holocaust.

History Education: Practices and Learning

All who have engaged in teaching history in schools have pushed up against perennial problems, such as the subject's reputation for being dull. Youths today, like their parents before them, may complain that history mostly is memorizing names and dates (even if the particulars of what to memorize change with political and social shifts over time). There is reason for concern that the rise of high-stakes standardized assessments and teaching-to-the-test pressures may exacerbate longstanding overemphasis on discrete factual mastery. History education research over the past three decades has increasingly challenged simplistic approaches that excessively rely on content memorization—particularly without intellectually robust application. Collectively, research in the field envisions practices that are more stimulating and require higher-order thinking—that present history as ongoing discourses about what happened in the past, why the past happened the way it did, and what the past means.

Schoolteachers will be central to the implementation of any new ideas for improving students' experiences with history in the classroom. In Chapter 15, Stephanie van Hover and David Hicks review research on the preparation and professional development of teachers of history. What occurs in schools—curriculum and teacher practices—is another perennial question for the field. In Chapter 16, S. G. Grant recounts curricular developments in the US in the 21st century to lay groundwork for examining how teachers teach history in terms of the "Inquiry Arc" of the *College, Career, and Civic Life Framework*, a recent U.S. guideline document for state social studies standards. How student learning can be known and evaluated is a major issue of long standing for the field. In Chapter 17, Denis Shemilt offers a look back at what has been done in the past to speculate on what approaches to assessing student learning should be developed in the future.

Intellectually powerful history learning will not emerge suddenly in late adolescence without prior exposure—yet often history in elementary grades seems to receive little attention (perhaps by both schools and researchers). In Chapter 18, Linda S. Levstik and Stephen J. Thornton survey research literature on young children's ability to learn history to offer a reconceptualization of history in elementary grades for thematic civic and humanistic goals. Of course, intellectually powerful history learning requires taking on powerful topics, which

inevitably at times will involve issues that can invite intense disagreement. How teachers respond to—or choose to avoid—this challenge is a serious question for history education, especially at a time of political tension and bitter partisan divisions in many countries. In Chapter 19, Tsafrir Goldberg and Geerte M. Savenije offer an examination of teaching about controversies and controversial social issues in history and how challenges may arise in different contexts.

Historical Literacies: Texts, Media, and Social Spaces

One of the most influential concepts in all of education in the early 21st century has been *literacy*—not just in its literal meaning of learning to read and write fluently, but also in the wider notion that critical analyses of texts and effective communication of ideas are important practices in other subjects and academic discourses. "Texts" go beyond the traditional printed word. Electronic and digital media have enlarged the possible kinds of texts—from film and television programs, to video games and websites, to blogs and digital "apps." There is growing appreciation in educational research that the products of almost any human endeavor—including social spaces such as public art, theater, monuments, parks, and museums—can be "read" as sites for meaning making.

History has been no exception to this growth of interest in literacy. Certainly the strong role that reading and writing played in much of the pioneering history education research of the 1980s and 1990s helped predispose the field to focus on literacy—to say nothing of the traditional orientation of the academic historical discipline toward primary source documentation. The past three decades have witnessed a steady expansion of research interest in media literacy in various forms as well. Today *historical literacy* or even *literacies* is common parlance in history education.

What exactly does historical literacy look like? Section V provides a wide view. In Chapter 20, Abby Reisman and Sarah McGrew survey the substantial research in the field on one of the foundational aspects of literacy: the role of reading texts in history education and historical practices. Paired with it is Chapter 21, in which Jeffery D. Nokes and Susan De La Paz examine the role of writing and argumentation in learning history and the development of historical cognition. In Chapter 22, Richard J. Paxton and Alan S. Marcus survey the surprisingly long and extensive literature on educational uses of film media in teaching and learning history. Historical media literacy is broadened further by Chapter 23, in which Cory Wright-Maley, John K. Lee, and Adam Friedman look at the uses and implications for learning history of simulations (which increasingly are digitally mediated) and computer-based gaming (including popular video games and digital apps). Jeremy D. Stoddard's Chapter 24 concludes the section by examining informal history learning and the public pedagogy of museums and other cultural sites, including new virtual experiences made possible by digital technology.

Conclusion: Consensus and Dissent

As can be seen in the chapters of this handbook, the academic field of history education has achieved considerable consensus across diverse international contexts. This is no small feat for a relatively young field. Conference communities

including AERA's Teaching History SIG and the National Council for the Social Studies' College and University Faculty Assembly (CUFA) have played a key role as networks for dissemination, discourse, and collaboration. Just as important has been the support of history and social studies research journals in publishing the growing research base. At least in the English language, the field is developing an internationally shared conceptual vocabulary. While variation and overlap remain—as well as regional differences in what aspects tend to be emphasized in research—historical thinking, reasoning, consciousness, empathy, agency, argumentation, and literacy are recognized distinct constructs. There also appears to be consensus that learning history is a multifaceted experience that can and should begin in childhood, that history constitutes an important mode of literacy, and that history education extends to formal and informal encounters with media, museums, and cultural sites.

Additionally, commonly shared values have emerged in the academic field of history education—as can be seen in many of the chapters in this volume. Building on liberal, humanistic, and social-reconstructionist educational traditions, there seems to be widespread agreement that the study of history should be a way to challenge social inequalities by exposing the historically constructed nature of oppressive institutions. Historical thinking, evidence-based reasoning, and literacy should empower learners to promote social justice for historically marginalized identities and greater equality globally. It helps that these values in academic history education are widely shared by academic historians. Indeed, the values writ large may be shared across much of academia. Of course, commonly shared values do not mean uniformity. Differences in interpretation, evidence, and content are vividly possible. What they do mean is that decisions to focus on or emphasize diverse or marginalized perspectives over traditional or majority perspectives generally do not have to be explicitly justified.

What will the conceptual consensus and commonly shared values in the history education research field mean for its influence beyond academia—into the world of schools, teachers, families, and public policy? It may be worth pondering whether too much consensus, especially on communal ideological values, is necessarily healthy for history education as a field. If anything seems clear from the politically tumultuous outcomes of referendums, presidential elections, and political movements in the UK, the US, and Western Europe in 2016–2017, there is a growing reaction of dissent to some progressive assumptions. Meanings of identities and labels commonly assumed in academic discourses may be challenged by dissenters in wider society (perhaps even global society if one accepts posited commonalities between U.K. "Brexit" voters and Donald Trump supporters in 2016). History education in academia may have insulated itself against such challenges internally (in terms of what is discussed at academic conferences, the ideological range of doctoral students recruited and admitted, and faculty membership), but it cannot be insulated outside academia. If the history education field does not have to engage with ideological dissent or acknowledge alternative ways of framing historical issues, there is a risk that it could become irrelevant—dismissed as "liberal" or "leftist" propaganda by some sizable portion of the population and the policymakers elected by them.

The world today is globalized, but citizens still vote for leaders and parties in their nations. Conflicting ideological perspectives will continue to affect the political and educational courses of societies. Accepting debate and dialogue as healthy is manageable when there is at least some societal consensus on what democratic values mean. Maintaining civil discourse is hard when values and their meanings break down. If history education does not maintain or reestablish such healthy discourse with wider communities, could the next wave of "culture wars" over history in schools strike a mortal wound to the whole enterprise? There already is an alarming anti-academic/expert, if not outright anti-intellectual, tendency in the dissenting reaction in the US and the UK. This reflects an evaporation of trust in intellectual authority—academic expertise dismissed as merely another kind of political rhetoric. Perhaps if more ideological dissenters felt they had a stake in academia, the future direction and leadership of dissent reaction might be less anti-academic/intellectual. Substantively engaging with more pointed conservative critiques might even improve the quality of history education scholarship or draw more teachers or policymakers to read and consider using the research literature—which should be one of the primary goals of the field.

In conclusion, this handbook offers a picture of the growing international field of history education as it has evolved by 2017. The contributing authors include veteran researchers who have brought the field to where it is at this moment as well as promising scholars of the next generation who will, to borrow Sam Wineburg's (2001) ever-apt phrase, chart the future of teaching the past. With history education at a crossroads during a time of divisiveness within many liberal democratic societies as well as emergent global culture, it may be tumultuous to chart. What future history education will look like—if it can find a way to be inclusive across intense disagreement—is a public, perhaps global, decision involving schoolteachers, scholars, and graduate students, today and to come.

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Section I

Policy, Research, and Societal Contexts of History Education

1

History Curriculum, Standards, and Assessment Policies and Politics: U.S. Experiences

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This chapter traces the long-standing debates over history education and curriculum in the U.S. public school system that took place throughout the "long twentieth century" (1890s to the 2010s), with attention to historical and historiographic contexts as well to contemporary political and scholarly circumstances. The case will be made here that over the long 20th century, a number of recurring and in some cases overlapping debates centered on profound dichotomies in the character and efficacy of history curriculum that were always representative of changing political and social contexts. These curricular dichotomies, addressed in this chapter, are the scope of study (breadth versus depth); the learning outcome of study (transferable skills versus content knowledge and/or heritage); the spatial scale of study (the nation-state, the "West," or the world); and the disciplinarity of study (history or social studies). California, the most populous state in the United States, and one of the first states to adopt a formal history–social science curricular framework and standards, will receive special focus throughout as an example.

In this chapter a case will be made that the dichotomous curricular tensions of the long twentieth century appear to be abating, that positions are converging, and that broader—though not complete—consensus is being reached. In the vast majority of states, history is now studied as a standalone discipline at least in the secondary grades. In reaction to the expansion of accountability measures, most notably enshrined in the No Child Left Behind (NCLB) legislation of 2001, most states had written copious history standards that still privilege a progress-and-nation-building narrative but are more inclusive of the agency of people of color, women, and nonelites than was the case of curriculum and textbooks in the past. In addition, the rapid expansion of world history instruction, and attempts to internationalize U.S. history, represents a significant, if still incomplete, shift away from the curricular prioritization of national history. Moreover, greater curricular and instructional focus on *skills* relative to *content* has surfaced with

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contemporary interest in *historical thinking*. The development of what I call a historical thinking movement (Keirn & Luhr, 2012) within history education has significantly informed contemporary curricular change and bridged the false dichotomy between teaching either content or skills that has been articulated since the late 19th century. It will be argued here that the Common Core State Standards (CCSS) and the recently redesigned College Board Advanced Placement (AP) history curricular frameworks have made a curricular and instructional focus upon the teaching and learning of history with depth and attentiveness to the procedural knowledge of the discipline (i.e., skills) far more sustainable than in times past.

The History of History Curriculum

In the late 19th and early 20th centuries, the rise of the modern research university was associated with the formation of disciplinarity. The professionalization of history was marked not only by the conferring of the PhD in History but also by the creation of professional organizations such as the American Historical Association (AHA) in 1884 that helped formulate scholarly communities among those tasked with creating historical knowledge (Woolf, 2011). In the same period, education became a newly recognized discipline with the first PhD in Education granted in 1893. The reorganization of the university and its role in the creation and dissemination of knowledge pre-dated the systematic shaping and formation of curriculum and learning in schools. The top-down relationship between the diffusion of scholarly knowledge and its translation into school curriculum is best represented in the sciences but cannot be as easily characterized in terms of the discipline and curriculum of history. Although history curriculum in schools has always been connected to changes in the historiography diffused from scholarly monographs and periodicals into tertiary textbook accounts, unlike most other disciplines this trajectory of knowledge to curriculum is uniquely informed by political, cultural, and social agendas. Indeed, the creation of national historical narratives, and their dissemination through the teaching of history in schools, has been an important part of the historical process of state and nation building since the turn of the 19th century (Anderson, 2006). History curriculum in schools also carries with it the obligation of addressing and representing heritage as well as, in many cases, imparting civic knowledge, dispositions, and values with significant local variation (Barton & Levstik, 2004; Lowenthal, 1985).

Hence, while historical scholarship can be represented with some coherence across time and scholarly settings, school history curriculum in the US—where a national history curriculum has never existed and the role of the federal government in education was limited prior to the 1960s—demonstrates tremendous variability between states and local districts within them. Curricular decisions concerning history education were largely made locally, and history teachers had considerable latitude in terms of what and how they taught. This local control makes it difficult to construct a history of history curriculum. The emergence of

curricular history as a research field in colleges of education in the late 1960s, with considerable focus on the study of history curricula, has also remained largely segregated within the field of the history of education (Franklin, 2012; Reese, 2010). Moreover, history education in schools has been poorly served in the historiography of modern U.S. history where American historians paid little attention to the history of school teaching (Goldstein, 2014). Even today the expanding work by historians on historical memory, commemoration, and public history that has had much to say about the role of museums and monuments has had little to contribute to the history of history education (Bodnar, 1993; Lowenthal, 1996; Rozenzweig & Thelin, 2000).

History Curriculum in Elementary Schools

History instruction in U.S. elementary schools was limited in the first half of the 20th century. With origins in geographic and citizenship education deemed necessary for a democratic society in the 19th century, the *expanding environment* curriculum became well established by the 1930s. Popularized through a series of influential elementary textbooks by Paul Hanna, this curricular approach was based on notions that young children learned through a widening geography of experience from the local to the state to the national. The expanding environment curriculum was a social studies—as opposed to a history—curriculum and integrated multiple disciplines, including civics, economics, geography, sociology, and history (Barton, 2008; LeRiche, 1987; Schwartz, 2002). It was associated with notions that success in history and the learning and retention of facts were more appropriate for older learners in later elementary classrooms and beyond. The expanding environment curriculum contributed to the establishment of state history in elementary schools where it is taught in the fourth grade in larger states such as California, Florida, New York, and Texas (National History Education Clearinghouse, n.d.; Wade, 2002). The majority of states still have elementary curricula that vary little from the expanding environment model (Martin, Maldonado, Schneider, & Smith, 2011).

The larger contemporary debate about history education in elementary schools has not been about what is taught but rather if history and social studies should be taught at all. Since 2001 the focus on reading and math accountability measures inspired by NCLB has led to a significant decline in instructional time devoted to history and social studies in elementary schools within the enacted curriculum. Despite little change in their formal curriculum, teachers are pressured to focus upon reading and language arts to increase test scores, and history and social studies are marginalized as a consequence (VanSledright, Reddy, & Walsh, 2012; Wills, 2007). Districts that provide grade-specific curricular reading supports for history and social studies have not witnessed the significant decline in instructional time found nationally (Boyle-Baise, Hsu, Johnson, Serriere, & Stewart, 2008; Hutton & Burstein, 2008). This has also been the case where elementary teachers have more instructional autonomy and demonstrate strong dispositions and content knowledge to teach history and social studies (Fitchett, Heafner, & Lambert, 2014; Lintner, 2006).

History in Secondary Schools Prior to 1980

By the end of World War I, all states had imposed compulsory secondary schooling, and history had established itself as a core discipline in local curricula. In 1893 the National Education Association (NEA) formed the Committee of Ten to suggest a high school curriculum for social education. Dominated by academic historians, the Committee of Ten essentially promoted a form of history teaching in schools that was national and patriotic and that mirrored the teaching of history in universities, with a focus on the reading of foundational documents and texts in U.S. history. In 1899 the AHA, at the urging of the NEA, created a Committee of Seven that was influential in promoting a four-year secondary history curriculum that abandoned a focus on reading primary sources and foundation documents and argued for a narrative- and textbook-driven approach to history focused upon a story well told. This curriculum was highly influential in the first two decades of the 20th century (Evans, 2004). The primacy of history in American social education in the early 20th century was a result of the early professionalization of the discipline of history relative to others in the social sciences and humanities, and also reflected the interest of a generation of historians who often had been schooled within liberal education curricula that predominated in the 19th century and where history was perceived as a core and "civilizing" subject.

The primacy of history in U.S. secondary schools was challenged in the interwar years by advocates for a social studies curriculum in which history was one of a number of subjects taught that included geography, civics, sociology, and eventually economics. Social studies advocates came from a variety of social and political constituencies but generally were associated with the Progressives, who painted history as an inherently conservative discipline that focused on the past as opposed to training citizens to solve the problems of the present. By the 1920s, a new generation of American historians was much more interested in research than in the role of history in schools. In 1921 the AHA supported the creation of the National Council for Social Studies (NCSS) as a professional body for the teaching of history and social studies in schools (Novick, 1988; Townshend, 2013; Watras, 2002). Soon, however, NCSS proved to be an important organization for the promotion of a social studies curriculum at the expense of one centered upon history. From the late 1920s through the 1970s, most states and local school districts adopted a secondary social studies curriculum rather than one centered upon history. This trajectory was accelerated during the turbulent 1930s and again in the 1960s, when a present issues-oriented and problem-solving curriculum was attractive, and diminished somewhat by agendas to promote patriotic history instruction in the 1940s and a focus on the discrete study of different social science disciplines in the 1950s (Evans, 2004; Thornton, 2005).

The teaching of history—especially U.S. history—in secondary schools did not disappear with the prevalence of a social studies curriculum in the middle of the 20th century. Indeed, the so-called "culture wars" concerning the representation of U.S. history had their origins in the 1920s between Anglo-Nativists and European immigrants and their descendants, who promoted a more culturally plural form of patriotism and Americanization. Although fluctuating in the intensity of public interest, these culture wars have continued virtually unabated to

today's controversies concerning, for example, the recent Texas state history standards, the redesign of the AP U.S. History (APUS) and European courses, and revisions to the California History–Social Science Framework (Erekson, 2012; Gambino, 2015; Medina, 2016; White, 2014; Zubrzycki, 2016). Prior to the creation of state curricular frameworks and standards in the late 20th century, much of the controversy about *whose history* should be taught was embedded in conflicts over the selection of U.S. history textbooks. By 1930 the majority of state legislatures had passed measures to regulate and systematize the adoption of history textbooks. This regulatory intervention of the history taught in public schools was an important consequence of the culture wars in 1920s (Zimmerman, 2002).

Mirroring the politics of the New Deal, U.S. history textbooks in the 1930s were preoccupied with issues of class (and immigrants) as opposed to race (Kliebard, 1995). In Northern states, some African Americans entered into history textbooks and curriculum, but in Southern states neo-Confederate history textbooks were published for segregated White schools. In Southern Black schools, textbooks for a Black history curriculum were developed and published such that completely distinct histories were taught in racially segregated schools (Meier & Rudwick, 1986). These distinct history textbooks and curricula continued through the 1940s and were reinforced by U.S. conservatism during the early Cold War era, when anxiety about collectivism and communism surfaced more general support for Southern White textbooks that were perceived to support free enterprise and patriotism whilst rejecting racial integration (Zimmerman, 2002).

The 1960s and 1970s were important turning points in the development of history curriculum in the US. The preoccupation with contemporary issues, such as the Vietnam War, the Civil Rights Movement, the Cold War, and the economic and social transformations engendered by challenges to U.S. industrial supremacy, meant that the majority of states maintained social studies as opposed to history-centered curriculum. The *new social studies* of the 1960s and 1970s was characterized by an issues-orientated curriculum and a focus upon discipline-based social scientific study (Byford & Russell, 2007; Evans, 2004). However, U.S. history remained a core subject in all states. Inspired by the Civil Rights Movement and the Immigration Act of 1965, histories of people of color were also integrated into most textbooks and curriculum. By the 1970s, textbooks had expanded in size to include multicultural heroes of U.S. history; these heroes were, however, incorporated into textbooks and curriculum in ways that reinforced, as opposed to challenged, a progress narrative of U.S. history, nation building, and liberty. Although Black history courses increasingly lost ground to integrated U.S. history courses in public schools, the representation of minorities—and gender issues—in textbooks and curriculum was still encapsulated in separate sections or lessons and detached from the main narrative of American historical development (Zimmerman, 2002).

Creating History Standards in the 1980s and 1990s

While history, particularly U.S. history, had never lost its distinctive place in the school curriculum, it was supported by the growth of the conservative political movement and cemented its place as a stand-alone secondary school subject in

the 1980s—a trend that has continued to the present. Led by educators such as Diane Ravitch, and states such as California that began to create statewide curriculum in response to perceived failures in student performance and concerns about curricular coherence for large numbers of students who moved between school districts, history made significant inroads in the secondary curriculum at the expense of social studies. History-centered curricular reform was also associated with the *back-to-basics* movements that periodically became influential in the late 20th century. The 1987 Bradley Commission on History in the Schools—which became the National Council for History Education—made the case for teaching history through narratives and themes as a way to engage students in the study of the history and heritage of the past and to introduce concepts from the social sciences, such as economics and geography, through a history-centered curriculum (Barton, 2012; Evans, 2004, 2015). The publication and implementation of the *History–Social Science Framework for California Public Schools* in 1988 was influential in that other states created similar history-centered curricula, and educational publishers created textbooks aligned with the California framework. Based on this framework, in 1998 California adopted the *History–Social Science Content Standards for California Public Schools* (Fogo, 2011, 2015; LaSpina, 2009).

Anxieties about the global competitiveness of the US led to the publication of the influential *A Nation at Risk*: *The Imperative for Educational Reform* by the Reagan Administration in 1983. Followed by federal educational program goals such as *America 2000* in 1991 and *Goals 2000* in 1994, the 1990s witnessed a funded cooperative effort of national and state governments to create curricular standards and accountability measures to evaluate student learning (Evans, 2015). In the 1990s the federal government recognized history, geography, and civics as distinct subjects and provided funding to create national standards for each to serve as guidelines for the states. Academic professional organizations published national standards for geography (1994) and civics (1995) with little public fanfare; however, those created for history—and in particular those for U.S. history—reignited culture wars over whose history was to be represented in schools. Representing the currency of historical scholarship on race, gender, culture, and class, the national U.S. history standards inspired public criticism from conservatives for failing to focus upon the core nation-building developments, achievements, and canonical figures of U.S. history. In 1995 the national history standards were defeated in the U.S. Senate—ending not only the creation of national standards in history but also diminishing political enthusiasm for creating a national curriculum in general (Nash, Crabtree, & Dunn, 2000; Symcox, 2002).

Despite the defeat of the national history standards, the movement to create and revise state-level history–social science curriculum and standards has continued unabated to the present. This trend was further exacerbated by the passage of NCLB that tied federal educational spending to state testing of articulated learning standards (Evans, 2015). Although only 10 states specify history in the title of their standards documents, the majority of courses taught in history–social science in U.S. public schools are now in history, and half the states require a minimum of four years of state and U.S. history from fourth grade onwards

(Martin, Maldonado, Schneider, & Smith, 2011). Reflecting a move from a general social studies requirement to one centered on history or individual disciplines, approximately 40 states now mandate U.S. history as a graduation requirement—a figure that has risen over the past decade. Although in some decline due to budgetary restraints and the implementation of the CCSS, currently about half of all states engage in mandated testing of history in secondary schools (Martin et al., 2011). Demonstrating this trend in the growth of secondary history instruction, the expansion of test-takers in APUS has more than doubled since 2000. In the early 21st century, the teaching of U.S. history in schools also received federal support of close to $200 million dollars in Teaching American History grants that funded professional development for teachers (Ragland, 2015; Ragland & Woestman, 2009). Given the expansion of history as a mandated course of study, coupled with demographic expansion, the number of U.S. secondary students taking history courses has increased markedly since the 1980s (Barton, 2012).

In terms of content, when examining the variety of state curriculums created at the turn of the 21st century, U.S. history has changed only minimally since the "integration" of textbooks and curriculum in the 1970s and continues to support what VanSledright refers to as the "collective-memory project" with a nationalist orientation that renders U.S. history as an exceptional and successful democratic project (VanSledright, 2011). The focus of school instruction remains on the political history of the nation-state, although the historical representation and contributions of women and peoples of color has expanded, and the progress narrative of U.S. history and nation building remains unchallenged in most state curricula (Fischer, 2014; Fogo, 2015; Stern & Stern, 2011). The impact of this curriculum, now established for half a century, is reflected in a recent survey of public attitudes about "famous Americans" (who were not presidents) where the four most popular entries were Martin Luther King Jr., Rosa Parks, Harriet Tubman, and Susan B. Anthony (Wineburg & Monte-Sano, 2008). As is the case of the school teaching of national history in most countries, the promotion of national identity and heritage and a *memory-history* (Lévesque, 2008) remains dominant in the US. To some extent this curricular focus has been accelerated not only by political conservatism but also as a consequence of the expansion of history within curricula relative to social studies, whereby the obligations associated with a citizenship agenda have been increasingly foisted upon the teaching of U.S. history. Although the progress narrative remains a dominant paradigm in the school teaching of U.S. history, the NCLB focus on the testing of discrete factual knowledge has meant that few students remember this narrative on entry into university (Calder, 2013).

Global Perspectives in the History Curriculum

One major recent shift in the history curriculum of what is taught in U.S. schools is the rapid expansion of the teaching of world history. World history is a relatively new field within the discipline of history. From its genesis, and unlike any other field of history, writing and research in world history developed in synergy

with the teaching of the subject. In the 1950s William McNeill questioned the utility of teaching Western civilization to undergraduates at the University of Chicago at a time when the decisions of U.S. citizens had global significance within the context and tension of the Cold War. The world history course that McNeill initiated is now firmly established within the university general education curriculum around the US (Allardyce, 1982, 1990; Geyer & Bright, 1995).

McNeill's (1963) *The Rise of the West* magisterially examined and traced the history of the West in global context and in doing so represented a scale of historical investigation that went beyond a focus on the nation, region, or civilization. Into the 1980s, most of the writing and research associated with world history was still preoccupied with addressing the origins, timing, and consequences of the rise of the West. Hence when California was initiating a state K-12 curricular framework that was unique not only in requiring world history but also in requiring it at three grade levels, the representation within the curriculum was to some extent one of "the West in the world" and deviated only slightly from the accepted narrative of Western civilization courses. Some teachers and scholars, however, advocated against a Eurocentric version of world history. Inspired by multiculturalism and the recognition that a Eurocentric world history did not align with the increasingly diverse heritage of students in California public schools, there was considerable energy to construct a more inclusive world history curriculum that represented more of the heritage, culture, and history of non-Western societies (Dunn, 2006; Fogo, 2015; LaSpina, 2009). When the California History–Social Science Framework was implemented in 1988, the California state curriculum added important "non-Western" content in separate units of world history instruction, although the West remained at the center of the study of global development from ancient to modern times (Dunn, 2000).

The scholarship of world history has been radically transformed over the past two decades as historians responded to the contemporary intensification of globalization by investigating and surfacing the *connectedness* of historical development across large spaces and within premodern times. As a result, the integration of the contemporary world is not represented as a new and unique phenomenon but instead as one with origins and antecedents throughout world history. Moreover, in response to the resurgence of China at the end of the 20th century, world historians also resituated the significance of the West in world history relative to that of the East in the world historical narrative (Bentley, 1997; Gunder Frank, 1998; Marks, 2006; Subrahmanyam, 1997). Regarded as the *new world history*, this approach also advocated the teaching of world history with attentiveness to large spatial scales that transcend the nation, region, and civilization and enhanced by comparative forms of historical analysis and inquiry (Bain, 1997; Bentley, 2002; Dunn, 2010; Parthasarathi, 2016; Weisner-Hanks, 2007).

Since the introduction of the California state framework in 1988, the implementation of world history in state curriculums has been rapid. As of 2010, 44 states and the District of Columbia have world history curriculum, and like in California, 25 states begin the teaching of world history at Grade 6. Twenty-three states require world history for high school graduation (Martin et al., 2011). Well over 75% of U.S. students take a secondary course in world history—an increase of more than 125% since the 1980s (Bain, 2012). The Western civilization course

virtually disappeared from high schools with the creation of state history–social science standards and curriculum; however, scholars have shown that the curriculum of world history in virtually all states fails to be framed within the global perspective of current world historical scholarship (Bain, 2012; Bain & Shreiner, 2006; Marino & Bolgatz, 2010). In the few recent cases where the content of state world history curriculum has been modified, there are demonstrated attempts to represent world history from a global and comparative perspective. For example, the proposed Michigan Social Studies Standards pay considerable curricular attention to global encounters and interactions, and the recently adopted California History–Social Science Framework attempts to reorganize instruction with a relative focus upon concrete periods of time as opposed to disconnected regional and civilizational spaces, and in doing so both resituates the history of Asia relative to the West and is attentive to larger spatial frames, such as Afroeurasia and maritime basins (California Department of Education, 2016; Michigan Department of Education, 2015).

The growth of world history also can be seen in the development of curriculum projects. World History for Us All (WHFUA) has been developed since 2001 as an open-sourced online world history curriculum (with lessons and materials) that presents a unified chronology and examines the history of human societies through the lens of connectivity and integration. Some individual teachers and school districts have adopted WHFUA as an instructional tool to provide an important global curricular corrective to their state standards that they feel are Eurocentric or present world history in regionally aggregate terms (Dunn, 2007; National Center for History in the Schools, 2015). Inspired by the scholarship of historian David Christian and supported by Bill Gates, the Big History Project is another increasingly popular open-sourced online curriculum that examines human history within the larger and interdisciplinary scales of the universe, galaxies, and the earth (Big History Project, n.d.; Christian, 2011). The Big History curriculum has been adopted by close to 1,500 local teachers in a variety of districts, but the extent to which it is, or should be, replacing state-established history curriculum is debated (Sorkin, 2014).

In terms of the paucity of world history curriculum that is framed from a global perspective, one significant exception is the AP World History (APWH) course that was created and first taught in 2001–2002. APWH has been the fastest growing course ever offered by the College Board, with over 286,000 students having taken the exam in May 2016. Prominent world historians and history educators, such as Jerry Bentley, Peter Stearns, and Robert Bain, were directly involved in the creation and design of the initial curriculum to make it global and comparative in approach (Bain & Shreiner, 2005). The redesigned APWH course in 2016–2017 maintains a curricular focus upon global perspective, and the content coheres around a number of substantive concepts associated with the current scholarship of world history attentive to the significance of trade networks, human migration, state building, and transport and communication technologies in connecting and influencing human historical development across time and space (College Board, 2016).

This “global turn” in historical scholarship at the turn of the 21st century also has informed the study of U.S. history where scholars are increasingly focused on

the "US in the World" (Bender, 2006; Guarneri, 2007; Tyrell, 2007). However, beyond the introduction of a new theme, "America in the World," in the redesigned APUS course in 2014, this scholarship so far has had relatively little impact upon state U.S. history curricula (College Board, 2014; Reichard & Dickson, 2008; Symcox, 2009). For example, the recent revisions to the California State History–Social Science Framework (California Department of Education, 2016) for grades 8 and 10 provide little if any deliberate curricular attention to an examination of U.S. history in global context. In sum, although history teaching has been revived in one shape or another in the US, the history curriculum is still dominated by a commitment to national history and a version of world history for most students that critics see as largely Western and Eurocentric and still well removed from the historiographic and scholarly trends in the discipline.

Skills, Depth of Study, and Historical Thinking

Debates about the study of history in public schools in the long twentieth century have not been just about the content of the curriculum and the relationship of the discipline of history to the social sciences. There also have been recurrent debates about the development of student "skills" relative to factual content knowledge in the teaching of history that were integrated with similarly dichotomous representations of teaching history with attention to breadth and coverage or in-depth study. As noted above, prior to World War I there was considerable curricular focus on the study of U.S. history through a canon of foundational primary sources. Similarly, during the 1960s and early1970s under the aegis of the New Social Studies movement, there was considerable advocacy for teaching history through case studies with primary sources in the belief that students learned best when engaged with questions about historical evidence. Between 1960 and 1972 the Amherst Project developed over 70 teaching units on specific cases and topics for the study of U.S. history with primary sources and provided extensive workshops for teachers to write and teach these lessons without the use of the textbook (Brown, 1996; Cuban, 2016; VanSledright, 2011; Weber, 2014). In 1973 the Document Based Question (DBQ) was first introduced and enshrined within the APUS examination (Blackey, 2002; Rothschild, 1999). Accordingly, in the 1960s and early 1970s there was also significant advocacy for the *history laboratory* as opposed to the *history classroom* as the appropriate space of history teaching and learning (Sipress & Voelker, 2011). However, periodic promotion for the study of history through primary sources and in-depth study throughout most of the 20th century was trumped by the perceived need for breadth and coverage of content and the importance of promoting patriotism and a sense of a shared heritage through the history curriculum, all of which were associated with textbook-driven instruction (Sipress & Voelker, 2009).

The recent formation of a historical thinking movement that is now global in scope has had a much more extensive and sustainable impact on history teaching and curriculum in the US than previous drives to promote teaching with primary sources. The larger contexts for understanding the historical thinking movement relate to the cognitive revolution that surfaced the discipline-specific nature of

the construction, dissemination, and learning of knowledge as well as scholarly shifts in the humanities-focused inquiry from "what we know" to "how we know" (Wineburg, 2001). During this time, U.S. history educators became increasingly interested in the scholarship spawned by the 1972 Schools History Project (SHP) in Leeds, England, where teacher-practitioners and researchers began to investigate the impact of organizing instruction around disciplinary conceptual structures such as continuity, change, and causation. The instructional focus of the SHP on the disciplinary and procedural knowledge of history, as opposed to factual content knowledge, was incorporated within the National History Curriculum of England and Wales when initiated in 1990 (Cannadine, Keating, & Sheldon, 2012; Dawson, 1989).

By the 1990s, the scholarship of the historical thinking movement was distinctly Anglo-American, and the focus upon disciplinary thinking was aligned not only with the expansion of the study of history as a standalone subject but also with the growing disciplinarity that had been made possible by larger and more specialized numbers of teacher-education faculty within universities tasked with preparing teachers to meet the expanding enrollments in public schools after World War II (Cannadine et al., 2012; Labaree, 2004; Shulman, 1986). The publication of Sam Wineburg's *Historical Thinking and Other Unnatural Acts* (2001) was an important marker in the development of the historical thinking movement. He argued that when students engaged with primary sources they read them informationally for evidence without considering them historically or *sourcing* them with consideration of historical context, audience, and purpose. Wineburg's work also had implications for national discourses about literacy, as historical thinking was grounded in ways of reading that are also distinctly historical, and the distinction between historical thinking and literacy has become increasingly blurred and comingled (Downey & Long, 2016; Lee, 2011; Nokes, 2013; Schleppegrell, 2011; Wineburg, Martin, & Monte-Sano, 2013). Indeed, historical thinking currently dominates the scholarly literature in historical education in Britain and North America, is generating a burgeoning body of new research on an increasingly global scale, and has established what may be a canon of authoritative studies dedicated to the subject (Ashby, 2005; Bain, 2000, 2005; Barton & Levstik, 2004; Lee, 2005; Lévesque, 2008; Seixas, 1994; VanSledright, 2002; Wineburg, 2001).

However, it must be asked, what has been the impact of the historical thinking movement upon curriculum and teaching practice? For one, it has led to the proliferation of various schemes of history standards that specifically address student procedural as well as—or rather than—content knowledge (Andrews & Burke, 2007; Lee, 2005; Lévesque, 2008; Seixas & Morton, 2013). In the US, the National History Standards articulated five specific historical thinking standards (National Center for History in the Schools, 1996). The newly redesigned AP history course frameworks—currently the only national history curriculums in the US—contain nine specific historical thinking skills that frame the learning objectives in the course (College Board, 2014, 2016). The recent 2013 publication of the *College, Career and Civic Life* (*C3*) *Framework for State Social Studies Standards* promotes four specific thinking standards to frame inquiry in history. Adopted by the NCSS, the *C3 Framework* aims to guide states and districts in the

modification of their history and social science standards with explicit connection to the CCSS (National Council for Social Studies, 2013). Currently about 10 states, including Connecticut and New York, have modified—or are in the process of modifying—their state standards informed by the *C3 Framework*, and many of these states have been attracted to the *C3 Framework* due to its civics agenda rather than its articulated historical thinking skills (Center for Information and Research on Civic Learning, 2015). However, other states, such as California, have adopted CCSS but have not modified their history curriculum to align with *C3 Framework*. The new California History–Social Science Framework does not articulate any specific historical thinking skills and in fact only provides a few pages dedicated to teaching with historical problems within a 985-page curricular document (California Department of Education, 2016). The case of California is extreme, as most states have some articulation of specific historical skills in their curriculum, although standards and assessments (where specified and implemented) tend to focus on content rather than on procedural knowledge.

Historical thinking has had a significant impact on instructional materials—especially in building upon earlier advocacy for teaching with primary sources but doing so with greater concern for the historical and contextual reading of the documents and their reliability as evidence. For example, the 2014 redesigned AP history exams' evaluation of the DBQ (which had been unchanged since 1973) now requires significantly more sourcing analysis relative to the "flat" use of the documents as evidence in response to a prompt. No longer do students simply group documents but instead must put them in conversation with each other through corroboration, qualification, or contradiction. There has been a proliferation of teacher resources made available for teaching history with primary sources that provide a variety of downloadable templates, cognitive tools, and scaffolds to promote student sourcing of primary materials. For example, the Library of Congress and the National Archives provide these types of sources and resources electronically. The Teaching American History grant program also promoted significant in-service professional development for teachers in using primary sources to promote historical thinking (Westhoff, 2009). The Stanford History Education Group's (SHEG) *Reading Like a Historian* open-sourced curriculum currently has 110 inquiry-based lessons that focus on sourcing analysis of primary sources, with the majority of these lessons being in U.S. history (Stanford History Education Group, n.d.). Some districts, such as the Los Angeles Unified School District, have adopted the SHEG curriculum as a means to promote historical thinking rather than the factual approaches to learning associated with textbook instruction (Reisman, 2012; Watanabe, 2014).

Much of the research on historical thinking has revolved around the use of primary sources in history teaching and learning. Almost all of this research, and probably the majority of teacher practice in historical thinking, involves the teaching of national history (Gibson, 2014; Reisman, 2011). Working with primary sources requires the situating of documents in concrete and often local historical contexts, and to do so often narrows the scope and depth of instruction and makes it easier to comply with content curricular requirements within the narrower spatial and temporal scales of U.S. history compared with those of world history (Bain, 2012). Moreover, most of the curricular materials to support

the use of primary sources in world history align with isolated and episodic topics within world history, often associated with Europe as opposed to global historical developments (see for example Stanford History Education Group, n.d.). In doing so, these lessons and sources reflect the problems with the fragmented and/or Eurocentric forms of world history that predominate in state curricula. Barker and O'Brien's (2014) recent quantitative study of state standards also supports the notion that primary sources are far more likely to be named in state U.S. history standards. In addition, the primary sources that are identified in state world history standards are drawn almost entirely from topics in Western history (Barker & O'Brien, 2014).

Teaching world history from a global perspective requires maintaining a consistent focus upon large-scale connections and consequences of political, economic, and cultural interactions that cohere within a concrete periodization. To address this through the use of teaching with primary sources requires an astute instructional shift from connecting and squaring the local depth of study to the breadth of the global. This is one of the greatest challenges in teaching world history (Bain, 2012). There are other historical thinking skills beyond that of sourcing that facilitate student understanding of world history on a global scale. Since its beginning in 2001–2002, the APWH curriculum has required students to engage in historical thinking associated with comparison and continuity and change. These forms of historical thinking promote learning that recognizes the significance of larger historical contexts and forms of connectivity and causation that cannot be addressed in narrower instructional depths of study associated with primary source analysis. Beginning in 2014, all the newly redesigned AP history courses (in European, U.S., and World History) have historical thinking standards such as causation, continuity and change, and comparison that both frame instruction on larger spatial and temporal scales and at the same promote a multiplicity of modes of historical thinking beyond sourcing and evidencing documents. In addition, students must now also grapple with the thinking skills of historical interpretation and synthesis that are associated with the analysis of secondary historical materials. In this regard, historical thinking is better aligned with actual disciplinary practices as historians analyze primary evidence not only in historical contexts but within historiographic ones as well (College Board, 2014, 2016; Neumann, 2015).

Beyond limits associated with the depth and breadth of instructional study, there are many other challenges associated with the curricular expansion of historical thinking. Teaching historical thinking requires a form of teacher subject matter preparation that is grounded in the methodological and epistemological conventions of the discipline of history. State certification policies more often than not do not require a history degree to teach history in a secondary classroom. Assessments of subject matter competency in teacher certification exams, such as the Praxis or California Subject Examinations for Teachers (CSET), evaluate a candidate's factual content knowledge as opposed to their procedural knowledge of history. To promote historical thinking, preservice programs require stronger institutional connections between departments of history and teacher education. However, in many states, such as California, the institutional distances between the subject matter and pedagogic preparation of preservices are in fact widening (Hutton, Keirn, & Neumann, 2012; Keirn & Luhr, 2012).

Assessment

During the last quarter of the 20th century, history education did not escape the development, expansion, and centralization of accountability measures associated with the political climate that led ultimately to the passage of NCLB in 2001. In the 1980s the establishment of the National Assessment of Educational Progress (NAEP) created national tests of learning that included the assessment of U.S. history. Beginning in the 1990s, and aligned to the proliferation of state standards, just over half of all states created a variety of testing measures that were applied to learning in U.S., and to a lesser extent world and state, history. With some exceptions, as in the case of the New York Regents Examination, this system of history assessment was mainly implemented through forms of multiple-choice questioning (relative to the use of constructed response items) that assessed student recall of discrete factual historical content knowledge (Martin et al., 2011). More often than not, these forms of assessment were aligned with forms and domains of historical knowledge associated with progress narratives and a collectively memorialized nation-building story that was representative of the conservatism associated with the revival of history education in the 1980s (Grant, 2006; VanSledright, 2008). Students generally have performed poorly on these types of examinations (VanSledright, 1995). Some educators have claimed that teaching with a focus upon historical thinking and substantive concepts supports learners in retaining and remember the content knowledge of history (Lee, 2005; Lesh, 2011). However, until very recently, the move to make student historical thinking and procedural knowledge the focus of assessment has made little headway.

Perhaps the most significant reason why history curricula and standards have focused on the content as opposed to the procedural knowledge of history is because the latter has proven difficult to assess within reasonable parameters of inter-rater reliability, cost, and expense. The assessment of the factual sedimentary knowledge of history through multiple-choice items is relatively cheap. However, in many states the high cost of implementing Common Core language arts and math assessments through consortiums such as Smarter Balance (SBAC) and the Partnership for Assessment of Readiness for College and Careers (PARCC), and federal mandates to test science, have crowded out spending on state testing of other subjects, which contributes to the curricular marginality of history (van Hover, Hicks, Stoddard, & Lisanti, 2012). Some states, such as California, no longer test history (California Department of Education, 2014). Many states, including Connecticut and Colorado, are taking advantage of provisos in the Every Student Succeeds Act (ESSA) passed at the end of 2015 to shift middle and high school state testing measures to college-entry exams such as PSAT and SAT—neither of which assess history (Gewertz, 2016).

The high cost of assessing constructed responses, coupled with the marginalization of the state testing of history in general, has been a significant barrier to the furthering of the curricular advancement of historical thinking. I find this unfortunate because there have been many very recent innovations in history assessment that open the opportunity to assess historical thinking in ways that are both reliable and relatively cost effective (Breakstone, 2014; Ercikan & Seixas,

2015; VanSledright, 2014). Many of these new instruments also serve as important formative assessments and pedagogic tools for enhancing historical thinking. For example, History Assessments of Thinking (HATS), produced and open-sourced by SHEG, are useful measures for assessing student sourcing skills (Breakstone, Smith, & Wineburg, 2013; Stanford History Education Group, n.d.).

The new redesigned AP history examinations have created a mixed constitution of new assessment items that target nine distinct historical thinking skills across a variety of content themes, periods, and domains. The new Short Answer Questions contain sets of three short spiraled writing prompts that relate to a single topic or text, visual, or item of data and that address multiple historical thinking skills, such as historical interpretation, periodization, causation, and sourcing. The new Long Essay Question and format for the DBQ address and evaluate a specific historical thinking skill, and the scoring guides require that students engage in appropriate historical analysis (e.g., describing and explaining both similarity and difference in a comparative question) and do so with appropriate factual evidence, historical context, and attentiveness to sourcing with primary documents. The new multiple-choice items on the redesigned AP exam also evaluate historical thinking by assessing a student's ability both to interpret a stimulus and to apply that interpretation to the content and conceptual knowledge that is associated with the question (College Board, 2014, 2016; Charap, 2015). A recent study of piloted forms of these new assessment items demonstrated that they measure and elicit complex historical thinking with cognitive validity as opposed to surfacing test-wiseness, literacy, and historical content knowledge that has hampered efforts to measure historical thinking in the past (Ercikan, Seixas, Kaliski, & Huff, 2016; Reich, 2009). Indeed, many of the multiple-choice items on the current NAEP exam for history also engage students in the interpretation of primary sources of stimulus within the context of demonstrating content knowledge (Lazer, 2015). These assessments demonstrate that the traditional dichotomy between assessing content or skill is a false one (Counsell, 2000).

Conclusion

It has been argued here that the revival of history in the 1980s as an independent course of study in secondary schools brought with it a reassertion of the survey model that privileged breadth in the scope of instruction as well as the continued promotion of national progress and nation-building narratives in U.S. history and a tendency toward Eurocentric representations of world history. However, the promotion of historical thinking in history education provides an opportunity for history students to ponder how these narratives (and curricula) were constructed and to what purpose. Indeed, one of the strongest points of advocacy for historical thinking is that it surfaces critical approaches to the reception of information in what is an "information age" (Lévesque, 2008).

While historical thinking has made limited headway in state history and social studies curricula, I conclude that it nonetheless has provided an opportunity to end the cycles of recurring debates in history curriculum and education that

were common across the long twentieth century. The scholarship concerning the teaching, learning, and assessment of historical thinking has shown that the distinction between teaching historical content and teaching skills is a false one. So too is the perceived dichotomy that teaching in-depth is antithetical to teaching and covering the breadth identified in the curriculum. The new AP history frameworks have provided a model that squares the content of a survey course with historical thinking skills (such as continuity and change over time and comparison) that frame large temporal and spatial scopes of study, while also providing illustrative examples with narrow scopes of instruction that provide teachers and learners opportunities to engage in sourcing and contextual analysis. Furthermore, the introduction of historiographic analysis—identified in the AP framework as historical interpretation—provides students the opportunities to investigate and understand the disciplinary means by which all historical knowledge is constructed. Moreover, the innovative mixed constitution of assessments to be found in the redesigned AP history exams also provides an inspiration for assessing historical skills, and to do so at scale, and thus diminishing one of the principal impediments to expanding historical thinking within state curricula.

Teaching historical thinking can provide students with abilities to critically evaluate evidence, information, and arguments and, I argue, contribute to the development of skills and dispositions aligned with active civics agendas that converge the teaching of history and the teaching of social studies. These skills and dispositions need not be limited to AP courses. These same potentially transferable skills from history instruction are in alignment not only with the CCSS but also with the recently published College and Career-Ready Standards (CCRS) and Assessments put forward by the U.S. Department of Education as part of the ESSA rollout. It would seem that CCSS and CCRS, in conjunction with the model provided by the redesigned AP history courses, provide an opportunity for historical thinking to have a larger and sustainable curricular presence in the future in the US.

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2

History Education Research and Practice: An International Perspective

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This chapter examines history education research on curriculum and practices in selected European and Asian countries. Rather than develop case studies of specific countries, we develop broad overviews of regional examples and themes of research. We draw on literature from selected European (United Kingdom, Germany, and Sweden) and Asian (China, Japan, South Korea, Taiwan, and Singapore) countries to develop broad themes across cases and contexts. The chapter examines the ways history education is shaped and constrained in particular Asian contexts, the research tradition in the UK focused on second-order historical concepts and progressions of understanding that has influenced research in several other countries, and literature on historical consciousness in European contexts. We synthesize current scholarship and theoretical work found in the literature as well as discuss implications for curriculum and classroom practice and point to future areas of development for comparative international history education research.

We begin by developing three themes that make history education in East and Southeast Asia distinctive when compared to history education in Western contexts. We examine how particular traditions and historical experiences in Asia have generated certain conceptions of history and history education, which is especially evident in the production of textbooks in different countries.

History Education and History Textbook Controversies in Selected Asian Contexts

There has been substantial scholarship examining how history curricula and textbooks produce national narratives and official knowledge that shape national identity, collective memory, and the ways people think about the present and the future. Much of this work has examined history curriculum and textbook

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controversies in Asian contexts (e.g., Baildon, Loh, Lim, Inanç, & Jaffar, 2013; Foster & Crawford, 2006; Shin & Sneider, 2011; Suh, Yurita, Lin, & Metzger, 2013; Vickers & Jones, 2005). As Foster and Crawford (2006) have argued, textbooks serve as "powerful artifacts in introducing young people to a specific historical, cultural, and socioeconomic order" (p. 20). Saito, Alviar-Martin, and Khong (2014) have also noted that textbooks are important curricular devices that have "an intrinsic grammar of pedagogic discourse" (p. 75). School history provides selected resources for learning about the past and developing historically grounded identities (Barton, 2012).

In this section, we examine factors that have shaped history education and textbook controversies in selected Asian contexts. We highlight the ways particular historical traditions, World War II, occupation, colonialism, Western imperialism, and the emergence of developmental states integrated into the global knowledge economy have shaped history education in East and Southeast Asia. We find that history education in these regions is unique in a few ways. First, there is greater emphasis on values (often classified as "Asian" or "Confucian"), which means history education serves a more explicit moralizing function in the development of national identity. Second, we find that governments tend to more directly control history education curriculum and textbook production for nation-building purposes and to promote economic growth in the global economy. Third, history education and textbooks in these countries often give greater prominence to national traumas and offer narratives of historical grievance, national humiliation, and victimization that have complicated international relations in the region (Suh et al., 2013; Wang, 2008). These narratives are especially significant in shaping historical memory and national identity within each nation, but they also "chronicle relations with others" (Hein & Selden, 2000). According to Wang (2008), "The stories chosen or invented about the national past are invariably prescriptive, instructing people how to think and act as national subjects and how to view their relations with outsiders" (p. 787). Historical grievances are utilized by national elites for political mobilization and legitimacy and have become political battlefields between nations in East Asia (Sneider, 2011).

The education systems of China, Japan, Hong Kong, South Korea, Taiwan, and Singapore are relatively centralized (Jones, 2011; Su, 2007, Suh et al., 2013). These societies have also been influenced by Confucianism (Tu, 1996). In Confucian societies, virtue and morality are central features of historiography and historical thinking (Huang, 2007). Official state history has been treated as a "depository of moral exemplars from the past," and there was an emphasis on imperial examinations that made history "the religion of the state" (Vickers, 2005, pp. 14–15). In dynastic China, the moralizing approach to the past served as a guide to strong and effective governance (Vickers, 2003). The "lessons" of history played a role in developing moral imperial subjects.

Keeping historical records has always been a function of the state in Confucian societies, and this led to the "deeply ingrained expectation that the state has a role in supplying a 'correct' version of the past and an assumption that this will be enshrined in the history curriculum for schools" (Vickers, 2006, p. 31). This tradition of state-sponsored history has also meant "the function of school

history as a school subject in China has always been to moralize" (p. 31). Tohmatsu (2011) has similarly argued that "Chinese and Korean textbooks share the tradition of the Confucian historical narrative … [in which] history is not an academic subject but a moral discipline that trains people to become righteous" (p. 132). Lincicome (2009) has also commented on the role of Confucianism in Japan and the particular role that history education played in cultivating national morality. While all historical identification has ethical components, textbooks in Confucian societies are likely to make this a more explicit function of historical narratives and history education.

Research in civic and social education in Asia has also found similar emphases on transmission of content, examination performance, and inculcation of values. Scholars (e.g., Alviar-Martin & Baildon, 2016; Kennedy & Fairbrother, 2004; Lee, 2006) have highlighted the ways school curriculum in East and Southeast Asia is depoliticized, emphasizes the cultivation of virtue and ethical behavior in students, and favors collective welfare over individual rights. Chia (2012) has argued that history education, moral education, and citizenship education should be viewed as intertwined in many Asian contexts. Similarly, Jones (2011) found that the highly centralized education systems of South Korea, Taiwan, and China had exerted a high degree of control over curriculum, teacher education, and textbooks to ensure that history education fostered values desired by the state. According to Jones, history education in the three settings had been "explicitly co-opted to reinforce the more overtly political companion subjects of 'citizenship,' 'ethics,' and 'moral education'" (p. 209).

History education also has been co-opted to serve particular economic and ideological purposes in the rise of some Asian developmental states. Confucian values and ethics were considered central to the economic success of Japan and the Four "Asian Tigers" (newly industrialized economies) of South Korea, Taiwan, Hong Kong, and Singapore after World War II (Chia, 2012). Strong central governments, in many cases authoritarian, also characterized the developmental states' ability to gain and maintain political legitimacy by promoting and sustaining economic development (Castells, 1996). As Gopinathan (2007) has explained, these states were fragile and their sovereignty was under threat after World War II, but through strong state management they were "able to '*govern the market*' and not be subservient to it" (p. 57, emphasis in original). A key strategy in their development was a centralized education system that implemented policies designed to develop human capital and ensure social cohesion. History education in the region has served both purposes. History education reforms in South Korea, Taiwan, and China have been consistent with general educational reforms to cultivate human capital and the critical thinking and soft skills supposedly needed in the global knowledge economy (Jones, 2011). Crawford and Foster (2007) have similarly found that Chinese curriculum guidelines included both historical knowledge and skills central to historical thinking, along with greater emphasis on creativity, independent study, and collaboration skills to benefit national economic development.

Vickers (2006) has demonstrated how history textbooks can serve the different purposes of providing moral lessons, promoting national identity, and fostering critical thinking necessary to prosper in the global knowledge economy. In his

study of mainland China's textbooks and how histories of Tibet, Mongolia, Taiwan, and Hong Kong were represented, he found that the language of nationalism and the "One China Principle" were all-pervasive. For Vickers, history education was used to promote a singular, clear-cut, homogenizing narrative that served both moral and political purposes by presenting a celebratory, primordialist, and immemorial nationalist narrative. However, Vickers also found that Chinese history education had been influenced by recent international developments in teaching history to promote critical thinking and creativity in order to support China's rise in the global knowledge economy. Vickers (2006) has noted the tension this created with "reconciling the traditional moralizing aims of history education with new aspirations to turn the subject into a vehicle for fostering skills of analytical reasoning and critical thinking" (p. 35).

Policymakers and educators in the region are likely to experience these tensions as new history curriculum strives for some combination of preparing students for the global economy and global society while instilling a particular national identity (often around an "uncomplicated uniform national narrative") with greater emphasis on historical reasoning skills and understanding of disciplinary concepts (Symcox & Wilschut, 2009). While desires to create particular kinds of identities or citizens might be able to coexist with the disciplinary purposes of history education, as Loh, Baildon, Lim, Inanç, and Jaffar (2013) have argued,

> the effort to promulgate collective memory and create a national identity often trumps teaching historical thinking as a disciplinary or critical practice. History curriculum and the teaching of history inevitably entail entanglements among issues related to the formation of identities, social memory, emotions, and the politics, norms and needs of the nation-state (Zembylas & Kambani, 2012). When it comes to history education, this is why so much is considered at stake by political leaders and education officials. (p. 4)

Traditions of social deference to authority and the history of political authoritarianism in many Asian nations after World War II generally created contexts unfavorable to critical or alternative historical accounts (Loh et al., 2013). Histories that challenged the efforts of political elites to unite nations after World War II were marginalized and silenced, making it especially difficult to interrogate the founding myths and national narratives in the region (Bayly & Harper, 2008; Loh et al., 2013). In highly centralized education systems, sanctions can be administered by officials to minimize educational practice perceived to challenge or divert the national interests and agendas of policymakers. In Singapore, for example, this has led to an absence of substantive debate about history education curriculum (Afandi & Baildon, 2010). Instead, the "Singapore Story," an officially sanctioned history of the nation, has emphasized domestic fault lines, national "traumas," and persistent vulnerabilities, such as extremist ideologies, racial riots, and the influence of Western values and individualism (Baildon & Afandi, 2017; Loh, 1998). In response, social values variously called "Asian," "Confucian," and "communitarian" have been referenced as means to build a sense of national

community and thwart perceived dangers (Chua, 1995; Loh, 1998). This national narrative is a story of vulnerability and national survival due to good governance and the successful management of social conflict (Afandi & Baildon, 2010). Wang (2008) has noted that nation-states undergoing transition, such as many East Asian states did after World War II through periods of decolonization, nation building, and rapid economic development, placed great emphasis on a national history education to serve political purposes and develop national cohesion.

Another unique feature of East Asian history education is the role that the lingering "wounds" of World War II play in the collective memory of the region. Crawford and Foster (2007) have mentioned how the magnitude, intensity, and cost in human life continue to be keenly felt by people and often dominate the politics of the region. In their review of the ways history textbooks in Japan, China, and South Korea treated World War II, Suh et al. (2013) found that each country represented itself or its people as victims of the war. The authors found that Korean and Chinese textbooks provided narratives of national identity through their struggles against Japanese aggression. The atrocities of the Nanjing Massacre, germ and chemical warfare, Japanese colonialism, forced labor, and enslavement of comfort women highlight the brutality and suffering people experienced during the war. Tohmatsu's (2011) analysis of history textbooks in China, Japan, South Korea, and Taiwan found that Japanese textbooks read more like chronological lists of events, lacking a clear message about Japan's wartime past, with Korean and Chinese textbooks more "politicized" in terms of casting "moral judgments on important historical issues in which they feel their interests were violated or their national pride hurt" (p. 132). As a point of contrast, he noted that Taiwanese textbooks, while critical of Japan's wartime exploitation of Taiwan, provided a favorable view of economic and social development under Japanese occupation.

Suh et al. (2013) found that Japanese history textbooks also situated "the Japanese people primarily as passive victims of war and of the military that dominated the nation-state" (p. 43). They noted that for Japan the war ended in humiliating defeat and immense suffering, which represents a nationally shared experience. They concluded that all textbooks they reviewed failed to open up school history "as an interpretive space that would invite students to do authentic historical inquiry" (p. 49). In their analysis of several Chinese history textbooks focusing on the war, Crawford and Foster (2007) similarly found narratives that "require of students no standards of judgment.... The Japanese are variously described as aggressive and warlike; the strategies they use in war are irrational, uncivilized, and barbaric as they pursue expansionist and imperialistic policies" (pp. 96–97). Efforts to create national identity and collective memory trump teaching history as an interpretive or disciplinary practice.

Wang (2008) has highlighted how China's history curriculum and textbooks shifted from an official Maoist "victor narrative" over capitalist Kuomintang forces to a new "victimization narrative" that blamed the West and Japan for China's suffering. Undoubtedly, part of China's history has been its pride in its victories over colonialism and imperialism (Shin & Sneider, 2011). However, history education in China has also emphasized victimization under foreign forces. He (2003) noted that "the 'fundamental fissure' defining Chinese national

identity now shifted to the conflict between the Chinese nation and those foreign nations that had invaded and humiliated China in the past, the most ferocious one being Japan" (p. 30). The Sino-Japanese War (1937–1945), the Opium Wars (1839–1842 and 1856–1860), and international conflict between China, the West, and Japan were given greater attention in revised history textbooks, according to Wang (2008).

Victimization narratives and the corresponding ethical intensity of historical grievances have resulted in textbook controversies being especially fraught with political, emotional, and international implications. Textbook controversies in the region have become a central part of public disputes between nations and have provoked opposition to more accommodative foreign relations (He, 2003; Sneider, 2011). These controversies demonstrate how history is not just used to form identities, it is part of broader articulations in cultures about the past, and it is also used to exert influence in contemporary politics (Nordgren, 2016). Wang (2008) has discussed how the narrative of humiliation in textbooks is a central feature of historical consciousness in Chinese identity formation and political discourse, and how it resonates with other aspects of historical culture:

> The national humiliation discourse certainly is propaganda in today's China, however, it has a large and sympathetic audience.... People learn these sad stories not only from history textbooks or patriotic education activities, but also from their parents and grandparents. Without comprehension of the primordialist background of Chinese nationalism, we would not be able to fully understand why this elite-led top-down propaganda campaign could have realized its objectives of enhancing the regime's political legitimacy and improving social solidarity. (p. 800)

History textbooks, while being products of a particular historical culture, also provide "feedback loops" that stimulate nationalism, a sense of moral righteousness, and particular kinds of national identities, which then provide "a bigger market for nationalistic narratives" (Wang, 2008, p. 801). Textbooks are only one resource for developing identities, learning about the past, and thinking about the present and future, but they can be significant in their influence. The case of history education and textbook controversies in these Asian contexts points to the vital importance of expanding rather than constricting the range of identity resources available to students (Barton, 2012).

Second-Order Concepts and Progressions Around the World

The political imperatives that shape policy decisions around history education in several Asian countries provide further evidence of the ways school history is used to build national identity and serve national purposes. Even if the role is to preserve or institutionalize collective national memory and morality, government-authorized history textbooks in these countries are often written to offer students a privileged interpretation of the country's past. The tradition of school

history in the UK, however, offers a counter-example (Barton, 2009). Amidst changes in the political landscape and the frequent public debates over aims, purposes, and content, history education in England has largely eschewed the use of the subject as an overt tool for citizenship education or for the inculcation of patriotic values seen by some as vital to national identity formation (e.g., Lee, 1992; Shemilt, 2009). Instead, there is a strong tradition in Britain to view history first and foremost as a public form of knowledge with its own disciplinary criteria and standards of practice. More than simply a vehicle for the cultivation of citizenship or patriotic values, history education inducts students into a metacognitive tradition that can potentially transform the way they look at the world around them (Lee, 2011).

Much of the scholarly work related to aspects of history education in the UK, which also has influence in many parts of the world, is captured in the *International Review of History Education* (*IRHE*) series, edited by Peter Lee, Ros Ashby, and Stuart Foster. *IRHE* marked its 20th anniversary in 2015 and has produced eight volumes, each highlighting developments in empirical research and theory related to the disciplinary foundations of history education. The first, for example, examined trends in national history education policy and curriculum across several national contexts. Its editors (Dickinson, Gordon, Lee, & Slater, 1995) noted a marked departure from history education designed to support national goals by arguing that "history education is too important to be left to politicians, or indeed educational authorities, or any one country or tradition" (p. 2). The editors went on to make a case for developing shared understandings of what history education could be and for open discussion that wasn't bound to any national tradition. Subsequent volumes signified evolving interests and research agendas in international history education that have included cognitive and sociocultural perspectives on historical reasoning, understanding students' ideas and reasoning about the past, debates about history education, and the place of history education in an increasingly global age. As the editors of the most recent volume noted, although *IRHE* has been international in scope, much of the work has been significantly shaped by scholarship from the UK (Chapman & Wilschut, 2015).

There is a tradition of scholarly work in the UK that emphasizes the centrality of conceptual understanding in history. These developments were born out of the debates about history education in the early 1970s and continued throughout subsequent contests over the National History Curriculum in the 1980s and the 1990s. A consistent issue during this period was the need for urgent reform—against traditional curricula and pedagogies—if the subject was to survive as a lively and relevant discipline in schools (Bage, 2000). Moving beyond the conventional focus on chronology and historical knowledge, "new history" was called for to emphasize history's position as a distinct body of knowledge that could be understood only through the cultivation of specific skills and conceptual understandings (Phillips, 1998). In England this emphasis on understanding the disciplinary basis of the subject was embodied in curricular innovations, such as the Schools Council History Project (SCHP), launched in the early 1970s. The SCHP became the focus of empirical work on children's ideas about disciplinary concepts in history by a group of U.K. history education researchers that led

to what Wineburg (2001) described as “the most in-depth look at adolescent historical reasoning to date” (p. 43).

Drawing heavily on Hirst’s (1974) theory of academic disciplines as “forms of knowledge” which constitute different ways of knowing and Bruner’s (1960) “structure of the disciplines,” SCHP founders argued that students were capable of achieving higher levels of historical understanding if history was conceived as a *distinctive* form of knowledge and as a way of reasoning using second-order concepts in history, such as change and continuity, causation, significance, accounts, and evidence (Symcox & Wilschut, 2009). Research from Project CHATA (Concepts of History and Teaching Approaches) found that some students demonstrated sophisticated and inclusive knowledge about accounts in history (Lee & Ashby, 2000), were able to offer plausible (if simple) reasons to explain people’s actions in the past (Lee, Dickinson, & Ashby, 1997), and had the capacity to develop empathetic understanding of the past (Lee & Ashby, 2001).

One consistent conclusion reached by the CHATA team was that some children at a relatively young age already operate with highly sophisticated ideas making it possible to develop proper frameworks of history through systematic teaching that builds on prior understandings (Lee & Ashby, 2000). CHATA researchers advocated the view of learning history as “coming to grips with a discipline, with its own procedures and standards designed to make true statements and valid claims about the past” (p. 200). As Lee (1991) argued,

> [It is] absurd … to say that schoolchildren know any history if they have no understanding of how historical knowledge is attained, its relationship to evidence, and the way in which historians arbitrate between competing or contradictory claims. The ability to recall accounts without any understanding of the problems involved in constructing them or the criteria involved in evaluating them has nothing historical about it. Without an understanding of what makes an account historical, there is nothing to distinguish such an ability from the ability to recite sagas, legends, myths or poems. (pp. 48–49)

A core idea from this body of work is that students must understand the disciplinary basis of the subject and understand how knowledge about the past is constructed, adjudicated, and arbitrated. Most important, it placed the focus of history education directly on the ideas that students have about the past. The acquisition or development of students’ knowledge depended on their understanding and being able to apply key concepts. It required history educators and scholars of history education to pay attention to students’ ideas and understandings about the past and history as a discipline.

Research in the area of progression was underscored by the conviction that growth in historical understanding can be assessed and tracked by the ways students’ ideas about history changed and developed. Progression in historical understanding required looking at children’s understandings in terms of tacit ideas that enabled or inhibited students’ cognitive development (Lee, Ashby, & Dickinson, 1996). Progression models recognized the importance of uncovering students’ prior conceptions about history and provided a tool for making sense

of and responding to their pre-existing ideas. As Lee and Shemilt (2003) argued, understanding such prior conceptions is essential if teaching is to correct misconceptions; ignorance of preconceptions runs the risk of students merely assimilating new knowledge to pre-existing ideas. Such progression models, conceptualized in a developmental manner, could assist researchers and practitioners to predict the range of ideas they are likely to encounter and the kind of changes they might see as students' ideas develop (Lee & Shemilt, 2003).

CHATA research found that some students understood accounts as being constructed and not simply a conjunction of facts (Lee & Ashby, 2000). Some students were able to attribute differences in accounts to the ways historians worked—from seeing historians as relatively passive storytellers, dispensing ready-made stories or compiling and collating information, to thinking of historians as actively producing their stories, whether by distorting them for their own ends or by legitimate selection in response to the historical problems being investigated (Lee, 1998). Significantly, some students were able to recognize that historical accounts can never be complete, and that different accounts were created to answer different questions (Lee, 1996, 1998).

In designing a progression model that served as a "framework of knowledge" to inform educators about students' understanding regarding the nature of historical accounts, the CHATA team constructed an ordinal scale running from less to more sophisticated ideas (Lee, 1996, 1998; Lee & Ashby, 2000; Lee & Shemilt, 2004). This schema provided educators with a useful map of key points that students are likely to pass through on their way to acquiring deeper understandings about the nature of historical accounts. CHATA's progression model suggested that movement from one point to the next could be fluid, given adequate guidance and instruction.

This seminal work around second-order concepts and progressions has influenced international research on history education in many countries, including the United States, Canada, Brazil, Greece, Portugal, Spain, South Korea, Taiwan, and Singapore. There has been a range of studies on students' ideas related to specific second-order concepts, such as evidence (e.g., Ashby, 2011; Barton, 1997), empathy (e.g., Foster & Yeager, 1998; Lee & Ashby, 2001), chronology (e.g., Barton, 2002; Carretero, Asensio, & Pozo, 1991), causation (e.g., Lee & Ashby, 2000; Lee & Shemilt, 2009), significance (e.g., Barton & Levstik, 1998; Cercadillo, 2001; Seixas, 1997), and accounts (e.g., Afandi, 2012; Chapman, 2009; Hsiao, 2008; Park, 2008). Many of these studies highlighted progressions in other national contexts.

Research into students' understandings about historical accounts carried out in England, Taiwan, Singapore, and Portugal pointed to similarities in the way students were likely to view and make sense of accounts in history. In her study of secondary school Taiwanese students' understandings of different textbook accounts about the Japanese invasion of China in the 1930s, Hsiao (2005) found that students had authoritative views of textbooks and did not understand the role of evidence in evaluating different historical accounts. Generally, they lacked any evaluative or methodological criteria to help them assess different textbook accounts. She also found in a later study that patterns of Taiwanese students' understandings about accounts and their relation to the past were based on prior

conceptions about history textbooks (Hsiao, 2008). She proposed eight categories of response and remarked that many of the students' ideas about historical knowledge were consistent with those found in CHATA and studies in other cultural contexts.

In Singapore, Afandi's (2012) study on students' ideas about historical accounts revealed similar patterns of ideas in students' thinking about why accounts differed. The response categories appeared to mirror (in slightly different ways) CHATA's progression models. The students in his study held a range of preconceptions and were predisposed to employ different evaluative strategies when deciding between competing historical accounts. He identified three broad categories of students' ideas in terms of complexity and sophistication: from viewing historical accounts in a factual manner as copies of a fixed and objective past; to viewing accounts as multiple versions of a past that is complex and multifaceted; to viewing accounts as selective interpretations of past events that could be evaluated based on criteria. This factual-multiple-criterial continuum also described students' implicit view of historical knowledge: from conceiving historical knowledge as fixed or given representations of a singular (factual) reality; to conceiving historical knowledge as productions of human minds and (multiple) individual dispositions and viewpoints; to conceiving historical knowledge as reconstructions that are based on interpretation and therefore open to critical (criterial) questioning. Progression signaled students' ideas from low-level, simplistic conceptions about the nature of historical knowledge to more powerful ideas based on understandings of history as a defensible form of knowledge.

Similar studies have been carried out in Portugal. Barca (2005) examined how Portuguese students evaluated different historical explanations, but focused on the justifications they used for deciding whether one explanation was better than others. She found that 46.2% of 270 participating students believed there could be better explanations, while 33.6% did not think it possible to determine whether some explanations could be better than others. For some students an explanation was better if it was "more concrete" or conveyed "more data," while others rejected possibilities for better explanations on relativist grounds (as just point of view). Some students demonstrated an "objectivist view" that the sum of all versions would provide the best explanation. Barca (2005) concluded that, similar to CHATA findings, many students see history as "ready-made stories or as more or less biased accounts of the past," but the "idea of point of view as an historical feature appear[ed] to emerge at earlier ages in Britain than in Portugal" (p. 80). Barca noted that Cercadillo (2001) similarly found this to be the case in students' ideas about significance and suggested this may be due to differences in history curricula, since students start learning history from age 5–7 in the UK compared to age 10 in Portugal.

Gago (2005) examined 52 Portuguese students' responses to a questionnaire designed to elicit their ideas as to why two historical accounts about the same event differed. She found similar categories of response to the way British students made sense of different historical accounts in the CHATA study. Students' ideas and understanding of different historical accounts progressed through five stages. She noted that while the quality of explanation appeared to become more sophisticated with age, students from similar age groups were also able to present

conceptions at different levels of progression (as was the case among British students). She concluded that young students in Portugal were capable of explaining differences between accounts in sophisticated terms and encouraged history teachers to include different accounts of the same event in their classroom to foster criticisms of perspectives within a carefully designed pedagogy that supported historical inquiry.

Comparisons of the CHATA findings with studies conducted in international settings suggest some common patterns of ideas among students notwithstanding their different cultural backgrounds, language, and institutional contexts. Even as these internationally diverse researchers raised caution about the conclusions that could be made from a comparison of findings, they generally agreed that students hold a range of preconceptions about historical accounts that are common across cultural contexts and that vary in levels of sophistication. Nonetheless, while there has been some consistency in findings across different contexts, there has also been some variability. For example, earlier findings by U.K. researchers indicated that students displayed a strong tendency to think in terms of an inferior past (Ashby & Lee, 1987; Lee & Ashby, 2001). Research in Greece and Italy, however, may suggest an opposite view. Apostolidou (2007), for example, pointed to Greek students' views of a past that was glorious or superior to the present.

Interest in second-order historical concepts and progression in history learning have been central concerns for the past three decades in the UK. A growing body of international studies has further extended this knowledge base. These studies raise important implications for the teaching and learning of history: (a) history educators must pay greater attention to students' ideas about the past and history as a discipline; (b) students are capable of more sophisticated levels of thinking than typically recognized by teachers; (c) a carefully designed history curriculum and pedagogy can help students better evaluate and adjudicate diverse accounts; and (d) students need methodological criteria to help them reasonably evaluate historical accounts, check their ideas, and elaborate their reasoning. In suggesting that greater attention be given to helping students evaluate historical interpretations, Chapman (2011) has offered evaluative criteria and questions (e.g., Do they accurately draw on evidence? How comprehensively is relevant evidence explained? How consistent are the claims?) that can be used to evaluate competing interpretations or accounts of the past.

Follow-up research in different international contexts needs to investigate the extent to which this initial research on second-order concepts and progressions has influenced further research as well as curriculum and pedagogy. For example, to what extent is greater attention being given to the role of second-order concepts and students' ideas in history curriculum and pedagogy in Taiwan, Singapore, and South Korea, which have strong centralized systems that have used history education to promote national agendas? More research in contexts outside of the UK is also needed to examine teachers' ideas and practice related to teaching second-order concepts and history as a discipline. Research across contexts is needed to better understand the role of context in shaping teachers' and students' ideas about history as well as in shaping classroom practice that aims to develop conceptual understanding in history.

Global Scholarship on Historical Consciousness and School Curriculum

Recent work in the UK suggests that school history does not provide a "usable" coherent framework for understanding the past (Haydn, 2011; Lee & Howson, 2009; Shemilt, 2009). These scholars have called for the development of "big picture" frameworks that students can draw on to orient themselves in time (Lee, 2011) and a "conspectual framework of human history that enables them to articulate elements of the past with each other and with the present" in a meaningful fashion (Shemilt, 2000, p. 93). Lee (2011) has argued for a broader notion of historical literacy to cultivate an "active historical consciousness" that would enable students to "make sense of the never stationary past-and-present" (p. 68). This notion of cultivating active historical consciousness suggests a more integrated view of the elements of history education that have been the central concerns of contemporary scholarship (e.g., the contexts of history education, textbook accounts and narrative structures that shape historical understanding, students' understandings of second-order concepts, the development of historical reasoning competencies, the ability to contextualize, etc.).

Historical consciousness is an open concept that can embrace many elements of historicity, such as historical literacy, narratology, historical competencies, historical reasoning, historical culture, and historical understanding (Körber, 2015). The open and multidisciplinary nature of the concept, however, has also caused problems. There has been a high degree of terminological diversity and a general lack of conceptual clarity regarding key ideas in the field (Kansteiner, 2002), making the concept imprecise (Körber, 2015). Insights about historical consciousness have emerged from the fields of memory studies, public history, cultural studies, identity politics, heritage studies, and media studies to include discussions about national memory, public memory, counter-memory, official memory, cultural memory, and collective memory (e.g., Aronsson, 2015; Confino, 1997; Crane, 1997; Halbwachs, 1992; Kansteiner, 2002; Nora, 1989; Sturgen, 2008). For Aronsson (2010), the multidisciplinary nature of the field has resulted in a high degree of fragmentation, with each field attending to different facets of historical consciousness and historical culture.

Nevertheless, historical consciousness has assumed a central role in history education scholarship and influenced curriculum in several contexts. For Körber (2015), the concept of historical consciousness was an innovation that shifted history education from a focus on national agendas for social and political cohesion to viewing history more broadly and as a tool that enabled people to think historically and reflect on the historically situated nature of their experience. It also helped history educators be more aware of the variety of ways in which history is communicated and learned—to more fully consider the "variety of voices in which the echo of the past is heard" (Gadamer, 2006, p. 285). School history is one of many voices in the development of historical consciousness and most likely "forms only a small part of our consciousness of the past" (van Alphen & Asensio, 2012, p. 347).

History education competes with and interacts in complex ways with multiple other sources of historical consciousness. There are numerous points of reference to the past: family histories, political discourses, museums, memorials and other heritage sites, popular culture and media, and so on. School history is one of many reference points while "the media, their structure, and the rituals of consumption they underwrite might represent the most important shared component of peoples' historical consciousness, although this non-confrontational, semi-conscious, non-referential, and decentralized process is extremely difficult to reconstruct after the fact" (Kansteiner, 2002, p. 195). This statement points to the challenges of researching historical consciousness, since it is continuously produced and reproduced through a confluence of different media and institutions.

Historical narratives provide a useful framework for analyzing historical consciousness (Wertsch, 2004). Historical narratives, which give meaning to time by "telling [people] who they are and what the temporal change of themselves and their world is about" (Rüsen, 2005, p. 2), have also been a research focus. Several history education researchers have investigated the role of narrative structures and the ways they function as sociocultural tools for understanding the past (e.g., Barton, 2012; Carretero, López, González, & Rodríguez-Moneo, 2012; Peck, 2010; Wang, 2008; Wertsch, 1998, 2008). This work finds a range of narrative templates in national contexts as varied as the US, Northern Ireland, New Zealand, Spain, the Netherlands, Canada, China, and countries of the former Soviet Union. Typically, these narratives are "organized around a continuous and a temporal protagonist, the nation, which is at once the origin and final destination of the narrative … [and] create a positive emotional evaluation—frequently uncritical of the nation's history" (Carretero et al., 2012, p. 154). In their analysis of history textbooks of different nations (mostly Latin American), Carretero et al. (2012) argued that there are six common features of historical master narratives:

1) Exclusion-inclusion features that designate a positive "we" and negative "others";
2) Cognitive and affective anchorings of identity;
3) Frequent presence of mythic characters and narratives;
4) Search of freedom or territory;
5) Basic moral orientations that justify political decisions and various violent acts; and
6) Romantic and essentialist concepts of both the nation and its citizens. (p. 157)

Besides the analysis of historical narrative, the construct *use-of-history* has been elaborated as a way to link the concepts of historical consciousness and historical culture (Nordgren, 2016). It has been employed as an educational concept in history curricula in Sweden, Norway, and Denmark "to open classrooms to public historical cultures as a field of study" (p. 480). Use-of-history points to the ways history is used to communicate meanings about identity (both individual and collective) and past, present, and future (Aronsson, 2015). Nordgren (2016) has argued there are three main reasons for using history: to explain the world, to form identities, and to influence others. History is used to explain the

world through different historical references, analogies, metaphors, descriptions, narrative accounts, and comparisons (in both disciplinary and public forms). Since one's identity and experience are situated in time, history is also employed to relate identity to time, in terms of origins and through the construction of narratives that give meaning to identity over time (Thorp, 2015). History is also used to present different kinds of arguments and is central to discourses of power and counter-power, according to Nordgren (2016). Use-of-history provides a useful analytical concept for examining the many ways history is used as part of historical culture and the ways historical consciousness is communicated or performed (Nordgren, 2016). It provides a useful educational concept by helping teachers and students think about the ways history is used for different purposes in different societies, whether in political rhetoric, through memorials and commemorations, or in developing national identities.

The theoretical tradition of historical consciousness is now well established in Europe and has been enacted in several educational settings, especially in Germany and Sweden. Kölbl and Konrad (2015) have argued that historical consciousness is now the "key concept" in history education in Germany. Körber and Meyer-Hamme (2015) describe the FUER-model, based on Rüsen's work and developed by Hasberg and Körber (2003). It features four dimensions of historical competence:

1) Competence in devising historical questions, including questions about historical phenomena in everyday life;
2) Methodological competence to both "re-construct" historical explanations from information sources and analytically "de-construct" and evaluate historical statements (accounts, explanations, interpretations, narratives, etc.);
3) Orientation competence to relate others' judgements and conclusions about the past to one's own life and to society; and
4) Competence with historical knowledge to understand substantive concepts as well as understand and use second-order historical concepts. (Körber & Meyer-Hamme, 2015, pp. 93–94)

These dimensions have made historical consciousness explicit in curriculum by focusing on the conceptual and methodological tools necessary for the study of history as well as on the narrative competence to analyze and reflect upon the role of history to understand past and present and anticipate the future. As Kölbl and Konrad (2015) have argued, historical consciousness in Germany's curriculum provides a "cognitive apparatus to analyze history in a methodologically reflective way" (p. 23). These dimensions help history educators consider the ways students can use history and its cognitive processes to orient themselves in time, construct and critically analyze historical narratives, and draw on history to make sense of their own experience and present conditions. For Körber (2015), this curriculum innovation has operationalized historical consciousness as a set of competencies and capabilities, rather than a state of mind or theoretical orientation. In terms of assessment, it signaled a shift from content to performance standards.

Sweden's history curriculum aims to develop students' historical consciousness. According to Eliasson, Alvén, Yngvéus, and Rosenlund (2015), the curriculum

objectives include students being able "to use a historical frame of reference," "critically examine, interpret, and evaluate sources as a basis for creating historical knowledge," "reflect upon their own and others' use of history," and use historical concepts "to analyze how historical knowledge is organized, created, and used" (pp. 171–172). As in the German curriculum, there is emphasis on self-reflective history learning that enables students "to reflect upon their own and other people's uses of history" (p. 172). These uses of history are similar to those elaborated by Nordgren (2016) and include helping students understand how historical narratives orient people and society in time—and that people use history to influence ideas about the past, understandings of the present, and future orientations. Sweden's national assessments focus on historical consciousness and related competencies and are part of the Swedish strategy to influence the teaching and learning of history in classrooms (Seixas & Ercikan, 2015).

Conclusions and New Directions in Research

History curriculum, pedagogy, and assessment in Germany and Sweden provide cases in which the constructs of historical consciousness, use-of-history, and second-order historical concepts are being implemented in classrooms. These constructs provide useful frameworks to better understand the role of narrative structures in different contexts and the ways they are used in history education curriculum and textbooks for national, ideological, moral, and economic purposes. This supports comparative work to identify the influence of historical culture and different approaches to historiography as an important line of scholarly work internationally. The work of Carretero et al. (2012) and Barton (2012) to identify different types of narratives across national contexts provides models to systematically compare historiographies, narrative templates, history curriculum, and textbooks within particular regions as well as globally.

Since many countries have also introduced history education reforms emphasizing some aspects of disciplinary history, such as second-order concepts, comparative research across contexts is needed to consider the many different ways learning history as a discipline interacts with, and is perhaps constrained by, efforts to develop national citizens, moral subjects, and productive workers across national contexts. There is a need for more work that looks at the ways different contextual factors—historical, historiographic, national, neoliberal, cultural, political, economic, and so on—interact to shape history education across national contexts and the teaching of history as a disciplinary practice.

Conceptual and empirical work drawing on use-of-history can be especially important to provide frameworks for investigating each of the areas noted above—textbook and narrative accounts, efforts related to disciplinary history and developing historical understanding, and the different contexts that shape, enable, and constrain history education. For example, use-of-history can be used as an analytical concept to critically analyze textbooks by situating them in broader historical culture. Use-of-history can help teachers and students focus on the ways textbooks communicate meaning, try to explain the world (from official perspectives), produce (mainly nationalist) identities, and exert influence

in terms of moral orientations, inclusions, and exclusions, and privileged perspectives. Use-of-history also can help open classrooms to the study of historical culture using disciplinary methods and concepts. This would enable students to be more aware of the ways their historical consciousness (and ideation) is shaped by different aspects of culture. Paying greater attention to students' ideas in classrooms, in ways suggested by the U.K. research tradition, also supports this move toward making historical consciousness, historical culture, second-order concepts, and use-of-history central focal points in classroom practice.

History education does not have to be exclusively about national identity formation, as efforts in the UK suggest. As Barton (2008) found in his research, unlike U.S. students who tended to link their identities to narratives of national development, students in Northern Ireland "saw history as a way of learning about the lifestyles of people different than themselves" (p. 296). As part of this study, Barton (2008) noted that he never understood the narrowness of his own views about history education until he started researching students' ideas about history in Northern Ireland. This led him to understand how young people's historical thinking developed in relationship to different contexts and curricula. Comparative research has the potential to challenge previous ways of thinking and yield new insights (Barton, 2008; Hahn, 2006).

International history education research must more fully investigate the ways all kinds of difference shape understandings of history and the development of historical consciousness. This is especially important in the increasingly heterogeneous, diverse, and pluralistic societies of the 21st century. A good starting point in this endeavor might be to ask if disciplinary history, second-order concepts, and the concept of historical consciousness are mainly Western constructs and whether they apply to particular Asian cultural contexts, for example. Seixas (2017) has argued that multicultural and aboriginal forms of historical knowing may challenge conceptions of historical consciousness developed in Europe. This may also be the case with Asian conceptions of history and its uses. As Mignolo (2012) reminds us, histories are located in spatial dimensions too: "Western civilization managed to have the epistemic privilege of narrating its own local history and projecting it onto universal history" (p. ix). He goes on to argue that over the past 500 years, "one local history, that of Western civilization, built itself as the point of arrival and owner of human history. Ownership was expressed by building a system of knowledge as if it were the sum and guardian of all knowledges, past and present" (p. x). Comparative history education research offers the opportunity to better understand the nature of disciplinary history and historical understanding, different narrative templates, and historical consciousness across different contexts.

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3

Research Methodologies in History Education

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Research on history education has grown dramatically in the past 35 years and exponentially in the last 15. Barely a recognized field of research before the 1980s, history education is now a burgeoning area of inquiry conducted by researchers around the globe. In this chapter, we selected, organized, and reviewed studies from the 1980s to the present. We selected studies from before 2000 based on the work of authors well cited in the field. Given the great number of studies written between 2000 and 2016, we included those that appeared in top tiered journals, including *American Educational Research Journal, British Journal of Educational Studies, Cognition and Instruction, Curriculum Inquiry, Journal of Curriculum Studies, Teachers College Record* and *Theory & Research in Social Education*.

We also inputted the term *history education* into the database of Taylor and Francis, publisher of several well-respected journals, and received over 1,900 references published since 2000. We reviewed the first 300 titles and found 96 that referenced work in history education (as opposed to history of education, etc.). Although we did not include these articles in the chapter if they were not in one of the above-listed journals, the following journals published three or more history education articles and may be useful for researchers: *Compare: A Journal of Comparative and International Education*; *Comparative Education*; *Curriculum Journal*; *Journal of Peace Studies*; *Paedagogica Historica*; and *The Social Studies*.

Our selection criteria reflect several biases. One is that we only reviewed articles written in English. Another is that we focused on articles and included no books or book chapters published after 2000. We recognize that our selection process is U.S.- and Euro-centric and that research on history education throughout the rest of the world—including Africa, Asia, and South America—is barely represented. In addition, even with the criteria we employed, we may have missed articles that should have been included. For authors who have multiple publications, we selected among them for review, focusing on those that have been cited with greater frequency.

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To organize the chapter, we begin with a discussion of three conceptual approaches to research on history education. Although the chapter is about methodology, organizing studies by method without regard to epistemological categories would have disregarded the idea that history education (or any field) is driven by ontological, epistemological, political, social, and cultural orientations. Research methods are used to answer significant questions about the meaning and significance of the phenomena under review; they are not ends in and of themselves. Therefore, the following section of the chapter presents three major approaches or orientations to research in history education: disciplinary, sociocultural, and historical consciousness. In the presentation, we briefly explain the approach and discuss the foundational studies of each approach conducted in the 1980s and 1990s and set the stage for subsequent research.

After a review of the major approaches and foundational studies, we arranged subsequent research (2000–2016) by method and frequency. Both before and after 2000, the majority of studies have used qualitative methods. Because of the large number of qualitative studies, we created subsections listed by frequency (interview studies, discourse analysis, etc.). Within subsections, we clustered studies into the three major approaches and then by specific topic, such as effects of instruction on historical thinking, the influence of ethnic or religious identities on national historical narratives, and so on. We categorized mixed methods and quantitative studies according to topic, in part because neither of us is well versed in quantitative methods nor are we comfortable categorizing studies by the method of analyses. In addition, given the small number of mixed method and quantitative studies, we thought it was more useful to reference them by topic rather than by procedure.

Throughout the chapter, we have used the term *historical representation* to refer to all *physical forms* through which the past is presented, including historical sites, museum exhibitions, and historical commemorations, as well as historical texts, visuals of any sort, and oral discourses. The terms *historical text* or *historical narrative* are used interchangeably to refer to *oral or written discourses* about the past, primarily presented in narrative form. These include history textbooks, books or other narrative texts, curricular frameworks or learning standards, and oral or written historical narratives constructed by study participants. The term *historical understanding* refers to any of the ways people use and construct meanings about the past. It is distinguished from the terms *historical thinking* or *historical thinking skills*, which refer to disciplinary approaches to historical thinking, reading, or writing.

Conceptual Approaches to History Education

Disciplinary Approaches to History Education

Beginning in the 1980s, researchers in England conducted several studies on children's and adolescents' historical thinking (Ashby & Lee, 1987; Lee & Ashby, 2000; Lee, Dickinson & Ashby, 1996, 1997, 2001; Shemilt, 1980, 1987). According to this tradition, the concept of historical thinking was modeled after professional

historians' epistemological and methodological approaches to writing historical accounts and was based on cognitive constructivist theory, positioning students as "active disciplinary learners" (Seixas, 2015). Historical thinking encompassed understanding how to interpret primary sources, as well as how "second-order" concepts such as historical significance, cause and consequence, continuity and change, and empathy structured historical explanations and narratives (Ashby & Lee, 1987; Lee & Ashby, 2000; Shemilt, 1980, 1987). Following in the English tradition, North American researchers in the 1990s also began to research young people's historical thinking (Barton, 1997a, 1997b; Seixas, 1993, 1994, 1998; VanSledright, 1995; VanSledright & Brophy, 1992; Wineburg, 1991, 2001).

To elicit and analyze historical thinking, researchers used interviews as well as written responses and employed qualitative and quantitative methods. Most of the studies implicitly compared young people's understandings of historical concepts and methods to those of historians. Wineburg (1991), however, employed an expert–novice design to compare explicitly historians' and secondary students' interpretations of primary sources. Lee and Ashby (2000) conceptualized historical thinking as developing in stages from less to more sophisticated understandings of concepts and methods. Brophy, VanSledright, and Bredin (1992) employed interviews and classroom observations to examine the effects of instruction on children's historical thinking. Another innovation included using photo elicitation tasks to examine children's understanding of historical chronology (Barton & Levstik, 1996; Levstik & Barton, 1996).

Sociocultural Approaches to History Education

Unlike disciplinary researchers whose work is framed by historians' epistemologies and cognitive psychology, Wertsch (1998, 2002) employed sociocultural theory to examine how historical, political, social, and cultural contexts influenced the production and consumption of historical narratives. Defining historical narratives as "cultural tools" that people acquired from and contributed to via participation in social groups, Wertsch's work explored the purposes for which individuals and collectives like nations or ethnic/religious communities disseminated, appropriated, resisted, or revised historical narratives. These purposes often involved identity formation and maintaining a sense of group belonging. Wertsch used qualitative methods to interpret historical narratives in textbooks, official documents, and media, as well as among young people and adults.

Wertsch's approach changed the focus from individuals' abilities to employ historical reasoning and methods to produce an objective or rational interpretation of the past to social group uses and interpretations of history to create and sustain social identities. His work included comparisons between official historical narratives disseminated through schools, museums, media, and other venues and those disseminated by subnational communities or revisionist historians who contested parts or most of official narratives. Using a sociocultural approach, Epstein (1998, 2000) used interviews and photo elicitation techniques to examine how U.S. young people's racial identities influenced their interpretations of U.S. history. Barton and Levstik (1998) used a similar technique to examine the extent to which U.S. middle school students appropriated official national historical narratives.

Historical Consciousness

In Germany and other parts of Europe, Rüsen's work (1987, 2004, 2005) on historical consciousness represents a third research tradition. As Rüsen (2004) explained, "historical consciousness deals with the past as experience; it reveals to us the web of temporal change in which our lives are caught up and (at least indirectly) the future perspectives towards which that change is flowing" (pp. 66–67). According to Rüsen, the purpose of history education or inquiry is not to understand the past in and of itself. Rather the aim is to make sense of the past in order to create a perspective or orienting frame for understanding and acting in the present and the future.

Angvik and von Borries (1997) used Rüsen's concept of historical consciousness in conducting the largest survey to date on young people's historical understanding. They surveyed 32,000 14- and 15-year-olds throughout Western and Eastern Europe, as well as in Israel and Palestine, to learn the answer to the question "what does history mean to young people?" (p. 3). The survey asked questions about the definitions and purposes of history and the extent to which a nation's past affected the present and will influence the future. Around the same time, Kölbl and Straub (2001) published a qualitative study of historical consciousness of German adolescents engaged in group discussions. Topics ranged from the uses and contents of family, museum, and school histories to young people's views of historical time and the relationship between the past, present, and future. Although Rosenzweig and Thelen (2000) in the United States didn't employ the term historical consciousness, their large-scale telephone survey of 1,500 adults asked participants how the past influenced their everyday lives and hopes for the future.

Disciplinary, sociocultural, and historical consciousness approaches continue to frame the vast majority of studies in history education. Research conducted since 2000 has established a firm foundation for how young people and adults think, read, or write about history, how social identities influence historical narratives and other representations, if or how instruction affects students' understandings, and how young people or adults use the past in orienting themselves in the present and the future. In addition, researchers have moved beyond the almost exclusive use of semistructured interviews, photo elicitation tasks, and traditional qualitative and quantitative approaches to embrace a full range of research methods. As a consequence, the field has a broader and deeper knowledge base about the uses, development, and significance of historical understanding across various contexts.

Qualitative Research Methodolgies

In the *Sage Handbook of Qualitative Research*, Denzin and Lincoln (2011) define qualitative research as a "naturalistic approach to the world … meaning researchers study things in their natural setting, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them" (p. 3). In history education, researchers have used qualitative methods to examine how children, adolescents, and adults make sense of the past, either as an academic discipline,

as a socially constructed representation of a community's heritage, or as an orienting framework for acting in the present and anticipating the future. Below we have organized qualitative studies by data source, beginning with the most widely used sources and ending with those least employed.

Interviews

Interviews have been the most widely used data source to elicit historical understanding. Before 2000, however, the vast majority of research employed disciplinary approaches to examine historical understanding. Since 2000, the majority has employed sociocultural approaches. Of these, the most common have investigated how teachers' or young people's social identities (national, ethnic, religious, etc.) influenced their constructions of historical narratives or how teachers' or students' engagements with revisionist (vs. traditional or official) historical narratives influenced their knowledge or beliefs about historical accounts.

The majority of sociocultural studies have been conducted with young people in school contexts, exploring how national contexts and/or social identities have influenced students' constructions of national history. Using semistructured interviews and rank-order tasks, Barton (2005) and Barton and McCully (2005, 2010, 2012) examined the historical beliefs of 250 young people in postconflict Northern Ireland. They analyzed students' responses in relation to the contested histories learned within Protestant and Catholic communities, on the one hand, and inquiry-based nonpartisan history taught in schools on the other. In Argentina, Carretero and van Alphen (2014) also investigated adolescents' views of national history, considering whether they constructed Argentinians historically as a homogeneous or multicultural people.

Other researchers have used sociocultural concepts to examine how young people's identities influenced their views of national history. Researchers in England (Hawkey & Prior, 2011) and the US (An, 2009; Epstein, 2000; Halagao, 2004; Reich, Buffington, & Muth, 2015; Terzian & Yeager, 2007) used rank-order or card-sorting tasks, and/or interviews, to analyze how students' ethnic or regional identities shaped their explanations of significant historical actors and events. Peck (2010) used interviews and card-sorting tasks to take these studies a step forward by asking 26 native-born and immigrant students to reflect on how their national and ethnic identities influenced their constructions of Canadian history. Two studies (Barton, 2001; Yeager, Foster & Greer, 2002) conducted cross-national comparisons (Northern Ireland/US and England/US) of young people's conceptions of historical change and significance.

Two other studies combined or compared how adults (teachers or parents) and young people interpreted historical events. Wineburg, Mosborg, Porat, and Duncan (2007) used interviews and photo elicitation techniques to compare U.S. parents' and their adolescent children's understandings of the Vietnam War, as well as the role that sources such as movies and memorials played in historical understanding. Clark (2009) conducted interviews with 324 teachers and students in Australia and Canada to assess their views of their nations' "history wars," that is, public debates about teaching official "fact-based" national historical narratives rather than more critically minded approaches.

Other researchers used interviews to investigate how adolescents related past and present. Two investigated how Ghanaian (Levstik & Groth, 2005) or Argentinian (van Alphen & Carretero, 2015) adolescents related national history to contemporary concepts of democratic citizenship or national identity. Dimitriadis (2000) and Mosborg (2002) examined how U.S. adolescents' ethnic or religious identities influenced their interpretations of contemporary society. Shreiner (2014) compared U.S. political scientists' and adolescents' uses of history to discuss contemporary political issues. Though none of the authors used the concept of historical consciousness, the studies did examine how young people's understanding of the past influenced their views of the present.

Three studies examined how teachers engaged with revisionist historical narratives. Klein (2010) used interviews to investigate five Dutch history teachers' beliefs and practices about teaching history and democratic values, connecting past and present and presenting multiple perspectives in multicultural classrooms. VanSledright and Afflerbach (2000) asked two U.S. student teachers to "think aloud" as they read revisionist historical texts about an event, identifying if or how they integrated revisionist accounts into their prior traditionally oriented understandings of the event. Zembylas and Kambani (2012) used semistructured interviews to examine how 18 Greek-Cypriot elementary teachers thought about the emotional complexities of teaching controversial historical issues.

We found three disciplinary studies that only used think-alouds. Porat (2006) used think-alouds to analyze the "mechanisms" or internal processing that Israeli adolescents used to interpret a historical text. One U.S. study used think-alouds to explore secondary students' reasoning in relation to multiple-choice questions (Reich, 2009); another used think-alouds to investigate adolescents' uses of paraphrasing and elaboration after reading multiple historical sources (Wolfe & Goldman, 2005).

Interviews with observations, document analysis, and technology resources

Several studies combined the analysis of interviews, classroom observations, classroom materials, and/or student writing to examine disciplinary practices and/or their effects on learning. Researchers have examined if or how teachers have integrated historical thinking strategies into their instructional practices (Grant, 2001; Grant & Gradwell, 2005; Nokes, 2010), as well as the effects of such instruction on learners (Monte-Sano, 2011; Nokes, 2014; VanSledright & Frankes, 2000). A related study investigated how state-mandated testing in the US affected instruction (Gerwin & Visone, 2006). One U.S. study investigated how "author voice" in historical narratives influenced high school students' essays (Paxton, 2002), while another (Marcus, Paxton, & Meyerson, 2006) used think-alouds and classroom observations to evaluate secondary teachers' and students' understanding of historical films as evidentiary sources. In England, Hawkey (2007) assessed the degree to which teachers' instruction focused on historical thinking.

Sociocultural researchers also have used interviews and other sources. Studies of professional development seminars in Israel (Bekerman & Zembylas, 2010a) and the US (Sawyer & Laguardia, 2010) used interviews and observations or

videos to examine how teachers responded to revisionist narratives. Two U.S. studies (Levstik & Groth, 2002; Trofanenko, 2008) analyzed interviews, observations, and documents/displays to examine the effects of revisionist accounts on middle school students' historical interpretations. Zanazanian (2012) used interviews and oral narratives of Quebec history to investigate how an Anglophone and a Francophone teacher conceptualized teaching about the history of the "other."

Three studies combined sociocultural and cognitive approaches. Freedman (2015) analyzed secondary students' historical narratives, illustrating how they understood the limits of objectivity in the textbook account of an event but not in their written narratives about the event. Another U.S. researcher (Hintz, 2014) examined how philosophies of teaching influenced teachers' use of a curriculum that highlighted active learning. An Israeli researcher (Goldberg, 2013) analyzed how religious identities and disciplinary argumentation affected students' historical understanding.

A growing area of inquiry revolves around the use of technology, with researchers examining how or what teachers or students used or learned from various technologies (movies, videos, mixed media, digital primary sources, etc.). Three studies used qualitative methods exclusively, and collected teachers' and students' online entries—blogs, discussion boards, interactions with website materials—as sources for investigating disciplinary teaching or learning (Baildon & Damico, 2009; Friedman, 2006; Milman & Heinecke, 2000).

Videos and Online Sources

A few studies have relied solely on teacher or student written or visual records without the use of individual interviews. In addition to reflection papers, den Heyer and Abbott (2011) analyzed Canadian preservice teachers' "digital historical narratives," examining how they resolved tensions related to multiple perspectives on the past. In a study of high school students' historical empathy, Endacott (2010) collected all of his data online, including student journals, primary and secondary source analyses, and discussions.

Whole-Class Discussions

Recently, researchers in the US have examined whole-class discussions, relying primarily on videotape and/or extended field notes. Studies framed by disciplinary approaches have investigated history teachers' use of literacy texts and practices (Nokes, 2010), as well as their pedagogical strategies for promoting historical thinking (Reisman, 2015). One examined how a teacher's use of hypothetical historical scenarios promoted or discouraged whole-class discussions (Sherry, 2016), while another evaluated the effects of Socratic seminars on students' historical thinking (Kohlmeier, 2006). Other studies have reviewed the effects of history and government teachers' expressions of political opinions on student discussion (Niemi & Niemi, 2007) and the effects of world history instruction on students' understanding of national and global citizenship identities (Myers, McBride, & Anderson, 2015).

Discourse Analysis

According to van Dijk (2016), discourse analysis is the "systematic theory and analysis of discourses and their various contexts" (p. 1). Although discourse can refer to any written or spoken communication, and discourse analysis can be used to examine any written or oral text communication, we use the term to refer to the examination of written texts or other sources used in schools (as opposed to analyses of oral classroom interactions, etc.). In history education and beyond, there is a long tradition of conducting discourse analyses of history and social studies textbooks, often uncovering themes that are omitted from texts or the historical mis-representations of themes or groups included in texts. In recent years, scholars have examined curricular frameworks, in addition to textbooks, established by national, state, or regional governments, since such frameworks often govern the themes and topics found in history texts.

The 30-plus discourse analysis studies that we reviewed used concepts, themes, or theories from a range of theoretical or disciplinary frameworks to analyze history/social studies textbooks, curricular standards or frameworks, and other forms of "discourse" about history teaching or learning. In addition to traditional forms such as textbooks or curricular frameworks, we also included analyses of policy documents, newspaper or professional journal articles, museum exhibits, and even the transcript of a historically oriented television program.

Several studies examined the representation of minority groups in national historical narratives. Three critiqued the portrayal of Palestinians in Israeli textbooks (Al-Haj, 2005; Gordon, 2005; Nasser & Nasser, 2008). Within the US, researchers have critiqued history textbooks, standards, or museum exhibits for their representations of Asian Americans (An, 2016), Native Americans (Anderson, 2012; Stanton, 2012, 2014; Trofanenko, 2010), African American actors and events (Aldridge, 2006; Brown & Brown, 2010; Helig, Brown, & Brown, 2012: Hess, 2005; King & Womac, 2014; Morris, 2008; Woyshner & Schocker, 2015), women (Schmeichel, 2015; Woyshner, 2002), Hawaiians (Kaomea, 2000), and people of color in general (Sleeter & Stillman, 2005).

Researchers also have critiqued Asian history textbooks or curricular materials. Kan (2010) criticized traditional historical narratives and rote learning in Hong Kong's "Chinese history curriculum," seeing them as forms of social control imposed by mainland China. Like Kan's study, Su's (2007) analyses of Taiwan's history in elementary social studies texts, conducted between 1978 and 1995 when the nation underwent a series of protests and reforms, also highlighted China's efforts at control. Cullip (2007) took a different tack, critiquing Malaysian history texts for narratives that lacked interpretation and argumentation.

Scholars in postconflict societies also used discourse analysis to examine changing historical narratives. Torsti (2007) illustrated how postconflict Bosnian and Herzegovenian texts presented images of former countrymen as enemies; Ahonen (2001) documented how Estonian and German Democratic Republic textbooks replaced Communist inspired narratives after the fall of the Soviet Union; and Abdou (2016) evaluated how Egyptian textbooks misrepresented the historical development of Egyptian identity. In a review of Northern Irish textbooks between 1968 and 2010, Terra (2014) chronicled the change from the presentation of traditional historical narratives to inquiry primary-source-based texts.

Like Terra, others have conducted historical analyses of texts and policy or public documents related to history education. Wilschut (2010) analyzed continuity and change in the purposes for teaching history in England, Germany, and the Netherlands across the 19th and 20th centuries. Halvorsen (2012) analyzed a 1942 *New York Times* survey of U.S. college freshmen's historical knowledge, examining how long-standing debates about fact-based learning versus historical thinking skills and history versus social studies curricula played out in the public eye. Sheehan (2010) provided a 20-year perspective on the continuity of history teaching in New Zealand schools. Schär and Sperisen (2010) discussed changes in narratives of the Holocaust in Swiss history textbooks, moving from narratives of national neutrality to ones that acknowledged national accommodation if not complicity.

More recent studies also have used discourse analyses to investigate the relationship between public policies and debates and historical narratives used in schools. In Australia, Clark (2004) and Parkes (2007) critiqued how images of the child and issues of colonization played out in Australia's "history wars," while Sheehan (2010) examined public debates over the New Zealand history/social studies curriculum. U.S. scholars (van Hover, Hicks, Stoddard, & Lisanti, 2010) analyzed how debates over standards-based accountability systems in one state focused on traditional versus revisionist historical narratives.

A few studies used discourse analysis to evaluate other aspects of history texts, including religion in Canadian social studies materials (Patrick, 2015), agriculture in U.S. history texts (Howley, Howley, & Eppley, 2013), and Eurocentric bias in global history standards in the US (Marino & Bolgatz, 2010). Chappell (2010) investigated how role-playing in U.S. social studies texts promoted dominant perspectives of citizenship. Totten and Riley (2005) critiqued the shallow nature of instructional strategies used to teach the Holocaust in U.S. history materials.

Two studies used discourse analysis to examine how teachers or students related the present to the past or the past to the present. Nash (2005) analyzed the discourse in U.S. preservice teachers' essays about the meaning of patriotism and its relationship to teaching national history. Lévesque (2003) used discourse analyses to explore 18 Canadian high school history students' views of terrorism and how their understandings of history informed their views.

Finally, we found some novel topics that used discourse analyses. Reich (2011) analyzed how, over the years, multiple-choice questions on U.S. high-stakes tests represented the Soviet Union. Collin and Reich (2015) demonstrated how a U.S. history curricular unit presented from a disciplinary and a revisionist perspective employed different concepts of literacy. King and Womac (2014) analyzed the transcript of a television show to examine how the host represented African Americans in history. And another U.S. scholar (Harris, 2012) analyzed historians' journal articles to investigate how they conceptualized the teaching of world history.

Case Studies

We found about 25 published articles that used case study methods. The purpose of case studies is to provide an in-depth understanding of a small number of "cases" in real-life settings. Yin (2009) defined case study as "an empirical inquiry

about a contemporary phenomenon (e.g., a "case"), set within its real-world context—especially when the boundaries between phenomenon and context are not clearly evident" (p. 18). In case study research, examining the contexts within which the case is situated, as well as the complexity of conditions that characterize the case, occurs through a collection and analysis of several data sources.

Several U.S. studies have examined teachers' beliefs and/or instruction related to teaching historical thinking (Girard & Harris, 2012; Hartzler-Miller, 2001; Monte-Sano & Cochran, 2009). Others have examined the instructional practices of a history teacher and a special education teacher (van Hover, Hicks, & Sayeski, 2012); a secondary teacher who cultivated historical empathy (Brooks, 2011); and the effects of professional development seminars on teachers' instruction (Saye, Kohlmeier, Brush, Mitchell, & Farmer, 2009). In England, Cunningham (2007) used case studies to illustrate that promoting historical thinking was just one of many considerations history teachers took into account in their teaching.

Four U.S. studies examined how teachers used films or other technology to promote historical thinking. One examined how teacher preparation programs and students' dispositions influenced history teachers' use of technology (Doppen, 2004). Another explored how teachers used films as imaginative historical reconstructions and sources of evidence (Metzger & Suh, 2008). Saye & Brush (2006, 2007) examined how teachers' assumptions, knowledge, and dispositions shaped pedagogical strategies in a multimedia history unit. Journell (2008) evaluated the utility of a teacher's use of online discussion boards and emails to students to facilitate online historical discussions.

Finally, Breakstone (2014) designed an original case study by defining history assessment tasks as the unit of analysis. He designed, piloted, and revised three classroom-based assessment tasks—each one analyzed as a separate case—using student responses and think-aloud protocols as data sources to evaluate the tasks' validity and construct alignment as well as to assess the cognitive processes in which students engaged to answer the tasks.

Scholars also have used case studies in socioculturally oriented research. In the US, Schweber (2003, 2006, 2008) and Schweber and Irwin (2003) explored how teachers in different school contexts (elementary school, comprehensive public high school, fundamental Christian high school, Jewish day school) perceived different uses for and enacted different pedagogical approaches to teaching about the Holocaust. Other U.S. studies (Levy, 2014; Zakai, 2015) investigated how students' ethnic or religious identities influenced their beliefs about specific historical narratives taught in school and/or at home. Wills (2011) examined how elementary children appropriated their teacher's narrative schematic template or deep underlying plotline in "misremembering" the beginning of U.S. history.

Others have used case studies to capture teachers' instructional beliefs or practices. Two (Salinas & Castro, 2010; Stoddard, 2009) examined how secondary history teachers' ethnic identities or ideological perspectives influenced curricular decision making. Another two examined university professors' practices related to teaching culturally relevant pedagogies of U.S. history (Branch, 2005; Slekar, 2006). Fickel (2005) examined the effects of a professional development project on teachers' historical knowledge and culturally relevant practices related to Native American experiences.

In Australia, Hilferty (2007) conducted a novel case study of a professional history teachers' association, detailing how members contributed to and critiqued national curriculum policy related to history education. In the US, Brooks (2014) completed case studies on the ways in which two middle school history teachers connected the past to the present and how well their students did the same "to apprehend and act for the common good in the present" (p. 65). Although Brooks did not frame the study around the concept of historical consciousness, the study's approach and findings examined how teachers and students used their understandings of history for contemporary purposes.

Ethnography

We found 11 ethnographic studies of teachers' and/or students' historical understandings. Bekerman (2009a, 2009b) conducted a multiyear study of Palestinian-Jewish integrated schools in Israel, examining how efforts at peace education or multiculturalism unfolded in history and other classrooms. Zembylas and Kambani (2012) conducted similar studies of Greek- and Turk-Cypriot teachers and students in postconflict Cyprus. As research collaborators, Bekerman and Zembylas (2010a, 2010b) and Zembylas and Bekerman (2008) investigated in Israel and Cyprus the complex ways that collective memories of historical and contemporary trauma are transmitted across generations. Misco (2008) used ethnography to examine the affordances and constraints of teaching about the Holocaust in Romanian classrooms, a topic framed as controversial in a postcommunist nation.

In the US, Chikkatur (2013) used ethnography to examine the wide range of responses that a high school teacher and a diverse group of students constructed in an African American history course. Woodson (2015) examined how teaching traditional narratives of the Civil Rights Movement constrained African American adolescents' sense of civic agency. Most recently, Rubin (2016) and Dougherty and Rubin (2016) published ethnographic research on how national history is taught in diverse classroom settings in postconflict Guatemala; these two studies are the only ones we found on historical understanding in Latin America that were written in English.

Action Research

Action research is a form of inquiry traditionally conducted by a professor or teacher interested in examining one's own teaching practices, most often for the purpose of improving instructional or school-wide practices, as well as student outcomes. One university professor (VanSledright, 2002) examined his pedagogical decisions as he taught a disciplinary-based U.S. history class to fifth graders; another (James, 2008) conducted an action research project in elementary social studies methods classes to learn why many of her U.S. preservice teachers resisted interpretive approaches to U.S. history. In Canada, researchers and secondary teachers (Tupper & Cappello, 2008) evaluated what the teachers' students learned after the teachers received professional development related to a First Nations treaty. A U.S. high school teacher (Martell, 2013) evaluated his implementation of a culturally responsive U.S. history course on the historical understandings of an ethnically diverse class of students.

Mixed Methods

In a highly cited article in *Educational Researcher*, Johnson and Onwuegbuzie (2004) defined mixed-methods research as "the class of research where the researcher mixes or combines quantitative and qualitative research techniques, methods, approaches, concepts of language into a single study" (p. 17). In recent years, mixed-methods research has become well established throughout the research community; we found 19 studies using mixed methods to investigate historical understanding.

Some researchers used mixed methods to assess the effects of particular pedagogies or interventions on students' disciplinary thinking. Finnish researchers (Rantala, Manninen, & van den Berg, 2016) analyzed the effects of a simulation activity on 22 adolescents' historical empathy. Others in the US (Baron, 2016; Britt & Aglinskas, 2002) assessed the effects of online programs or coding systems on secondary or university students' interpretations of primary sources. De La Paz and colleagues (2014) evaluated the essays of struggling U.S. adolescents taught by teachers who had received professional development on disciplinary instruction.

Other studies employed mixed methods to investigate teachers' ideas or instruction about historical thinking as well as students' historical thinking. U.S. researchers (Marcus, Levine, & Grenier, 2012; Noel & Colopy, 2006) assessed teachers' ideas about using historical sites to teach historical thinking. Others (De La Paz, Malkus, Monte-Sano, & Montanaro, 2011; Kortecamp & Steeves, 2006) evaluated how professional development programs influenced U.S. teachers' historical knowledge, instruction, and/or perception of student engagement. Paxton (2002) evaluated the influence of "visible" versus anonymous authors on 30 U.S. adolescents' historical essays. Dutch researchers (van Boxtel & van Drie, 2012) analyzed how 132 university students contextualized historical texts and images.

Others have used mixed methods to examine interpretive stances toward knowledge. In separate studies, researchers examined students' responses to "difficult histories": Scottish students' views of the Holocaust (Cowan & Maitles, 2011) and Dutch students' views of and argumentation about slavery as part of their national heritage (Savenije, van Boxtel, & Grever, 2014a, 2014b). In a similar vein, Wilkinson (2014) in England investigated Muslim secondary students' responses to instruction about Muslim history. Researchers in the US (Brophy & Alleman, 2000; Halvorsen, Harris, & Martinez, 2016) and Spain (Sant, Gonazalez-Monfort, Fernandez, Blanch, & Freixa, 2015) examined how students' ethnic or regional identities influenced their views of historical concepts or narratives. And Benitez (2002) used mixed methods to establish the effects of a "globalized" U.S. history curriculum on secondary students' attitudes toward globalization.

Other studies examined students' or teachers' views about the purposes of teaching history or how national history should be taught. English researchers (Haydn & Harris, 2010) probed secondary students' beliefs about the purposes of school history. Six years later, one of the same researchers (Harris & Burn, 2016) investigated English history teachers' views of a government plan to require the teaching of specific historical topics. Cohen (2016) examined Israeli principals',

teachers', and students' views of how the Holocaust is or should be taught. Yemini, Yardeni-Kuperberg, and Natur (2015) analyzed Jewish and Palestinian-Arab preservice teachers' views of an appropriate K-12 Israeli history curriculum.

Several studies also used mixed methods to analyze school history textbooks, curricular materials, and/or learning standards. One (De Groot-Reuvekamp, van Boxtel, Ros, & Harnett, 2014) compared the conceptualization of historical time in history curricular documents in England and the Netherlands; another (Faas, 2011) compared how concepts of Europe and multiculturalism were represented in Greek, German, and English social studies curricula. U.S. researchers (Anderson & Metzger, 2011; Shear, Knowles, Soden, & Castro, 2015) have used mixed methods to analyze how state learning standards represented African American and indigenous people's historical experiences.

In a novel mixed-methods study, Goldberg (2013) evaluated the effects of the identities of Israeli Jewish students of different ancestries on students' evaluation of historical evidence and their use of the evidence to make historical arguments. In another interesting study (Goldberg & Ron, 2014), the researchers assessed how engagement with different types of national historical narratives affected the intergroup discussions of 155 Israeli Jewish and Arab students.

Quantitative Research Methodologies

Quantitative research involves the measurement and analysis of variables (i.e., characteristics or attributes) and most often includes dozens or more participants (Johnson & Christensen, 2012). Of the 10 quantitative studies we found, four in the US evaluated the effectiveness of instruction or course taking on U.S. students' disciplinary knowledge, thinking, or attitudes. Smith and Niemi (2001) analyzed a national data set to assess the effects of course taking, topic selection, and instruction on high school students' historical knowledge. Another study (Otten, Stigler, Woodward, & Staley, 2004) evaluated the effects of a dramatic arts history program on middle school students' knowledge and enjoyment of history. Hicks and Doolittle (2008) measured the effects of an online computer history tutorial on university students' analytic abilities, while Reisman (2012) evaluated the effects of a literacy-based instructional intervention on the historical thinking and reading comprehension of high school students.

Another four studies employed a disciplinary framework to survey teachers' and/or students' historical knowledge or beliefs. Hicks, Doolittle, and Lee (2004) surveyed 150 U.S. high school history teachers about their use of primary sources. Another researcher (Fogo, 2014) used an online survey of 26 U.S. history teachers, teacher educators, and researchers to assess their beliefs about instructional practices. Wanzek, Kent, and Stillman-Spisak (2015) surveyed 512 U.S. adolescents on their perspectives of the history instruction they received. Gehlbach (2004) examined the relationship between perspective taking and achievement of 278 U.S. high school students in world history classes.

We only found two related quantitative studies that used a sociocultural framework to examine historical understanding. Grever, Haydn, and Ribbens (2008) analyzed 400 Dutch and English high school students' views about the purpose

of learning history and the relationship of their views to their nationality, gender, and citizenship status. Grever, Pelzer, and Haydn conducted a similar study in 2011, surveying 678 students to extend their comparisons of Dutch and English students to include French students.

Over the past 35 years, research methods in history education have expanded to include almost the full array of those available and utilized within the broader research community. The field developed systematically in the 1980s, utilizing interviews primarily with individual students and employing qualitative methods to interpret young people's abilities to think historically. In addition, the survey of over 32,000 European youth by Angvik and von Borries (1997) set a numerical and substantive standard that has yet to be met. Since 2000, however, the methods used to investigate historical understanding have proliferated: focus group and whole-class discussions, ethnographies, action research projects, mixed-methods studies, and online data collection (and analysis) have contributed to the array of methods used to learn about how people in the present understand the past.

Reform Methodologies

The editors asked us to consider methods related to "reform advocacy." By reform advocacy, we considered methods that often are connected to reform and have not been used or are underutilized in research on history education. While we recognize that researchers can employ any method and be advocates of particular issues by virtue of their selection of question, conceptual framework, research design, findings, and implications, we consider reform advocacy methods as those that include either the "subjects" of research as active participants in one or more aspects of the research design or epistemologies that challenge or transform more traditional research approaches.

In this vein, action research, participatory action research, and youth participatory action research come to mind. As noted earlier, action research is a form of inquiry in which researchers examine their own practice in order to improve it and, often by extension, the learning of students, teachers, or others with whom they work. Action research is not as much about generating theory or policy recommendations or even research, although it may; as the term implies, it is about reforming "action" so that individual or group activity can become more effective. The fact that action research has become an accepted part of the educational research community is indicated by the 2009 publication of the *Sage Handbook for Educational Action Research* (Noffke & Somekh, 2009), a 500-page volume with chapters that range from origins, theory, and ethics to empirical studies of students, teachers, schools, and community projects.

In an earlier section of this review, we detailed a small number of action research projects and an even smaller number conducted by practicing K-12 teachers. What we did not find, with the exception of Tupper and Cappello (2008), is a particular form of action research: participatory action research (PAR) or youth participatory action research (YPAR). PAR is a form of inquiry where the researcher and participants not just jointly plan and implement

research; the participants also analyze the data, generate findings, and participate in many aspects or every aspect of the project. Bergold and Thomas (2012) conceptualized participatory research in terms of how participants'

> everyday practices, which have long since established themselves as a subject of inquiry, introduce their own perspective, namely, the way people deal with the existential challenges of everyday life. The participatory research process enables co-researchers to step back cognitively from familiar routines, forms of interaction, and power relationships in order to fundamentally question and rethink established interpretations of situations and strategies. (p. 1)

As the above quote implies, although there may be a lot of overlap between action research and PAR, there is a significant difference. PAR includes participants as equal partners in the research design and knowledge production of the study. While PAR does not necessarily lead to all participants becoming coauthors of the research, it does imply that participants are treated as co-researchers and equal partners with those who traditionally wear the mantle of "researcher."

YPAR is another form of participatory action research. According to Cammarota and Fine (2008), YPAR "provides young people with opportunities to study social problems affecting their lives and then determine actions to rectify these problems" (p. 2). One of the questions that YPAR seeks to address is "under what condition can critical research be a tool of youth development and social justice work?" (p. 2). The aim of YPAR projects is not published research, although that may be a result. Rather it is "transformation—systemic and institutional change to promote social justice" (p. 2). Cammarota and Fine also make a distinction between traditional and critical participatory concepts of research. Traditional forms of action research may use traditional forms of validity or reliability in their research designs. Critical forms of action research rely in large part on those who experience injustice—not just those who study it—to determine issues of validity and reliability.

There have been at least two YPAR projects related to history education. In the US, Morrell and Rogers (2006) worked with low-income students of color to become "critical public historians" as they researched the impact of the 1954 Supreme Court decision *Brown v. Board of Education* on the educational opportunities/challenges in Los Angeles, the city in which they lived. The students presented their research in public forms and created videos of the oral histories they conducted. Fine and Torre (2008) also worked with an economically and ethnically diverse set of youth to study the history of segregation. Their final project, *Echoes of Brown*, was a performance-based production and video of student responses to segregation historically and in contemporary society.

A related methodology involves visual or image-based educational research (Prosser & Burke, 2008) and is often used to enable children, adolescents, and other "non-researchers" to represent their understandings of the world. Researchers working in the fields of childhood and youth studies ask children and young people to produce drawings, photographs, and/or videos as ways to represent their understandings. The premise is that children and youth are active participants and interpreters of their social worlds and construct their own

unique perspectives. Image-based research has produced a range of methodologies, from simple draw-and-write techniques and concept mapping to the use of cameras, videos, photovoice technology, and photo collage. While history education researchers have used photo elicitation techniques to interpret young people's or adults' concepts of historical chronology (Barton & Levstik, 1996; Levstik & Barton, 1996) or perspectives on national history (Epstein, 2000; Wineburg et al., 2007), exploring historical understanding by asking participants to construct visual representations in the form of drawings, photographs, videos, and other forms is an area ripe for research.

Finally, a significant reform advocacy approach to education is what Linda Smith (1999) labeled as "decolonizing methodologies." Smith began her book challenging traditional research and researchers by noting that "from the vantage point of the colonized, a position from which I write, the term 'research' is inextricably linked to European imperialism and colonialism" (p. 1). Smith's aim was to "acknowledge indigenous perspectives on research" (p. 3). The perspectives included a deconstruction of the ways in which traditional research methodologies perpetuated or justified symbolic or physical violence toward indigenous communities, as well as indigenous researchers' perspectives on community-based research, situated "within a wider framework of self-determination, decolonization and social justice" (p. 4).

We found a few studies that used indigenous conceptual frameworks and/or methods to examine history education related to indigenous experiences or communities. As noted above, Tupper and Cappello (2008) conducted an action research project with teachers to evaluate the teachers' use of a First Nations treaty resource kit. Tinkham (in press), another Canadian researcher, used an indigenous framework and data collection methods, including conversations and sharing circles, to explore how First Nations adolescents in indigenous- and non-indigenous-controlled schools conceptualized the relationship between history learned in their communities and history learned in schools. In the US, Stanton (2012) used critical indigenous conceptual frameworks to evaluate primary and secondary historical sources by or about Native Americans, while Mason and Ernst-Slavit (2010) used critical theory to analyze teachers' discourses about Native American history in elementary school classrooms.

Although educators have developed a number of other "decolonizing" conceptual frameworks and methodologies—critical race theory, LatCrit theory, AsianCrit theory, and so on, to name a few—we only found three studies that utilized these approaches. In the discourse analysis section, we reported on Helig, Brown, and Brown's (2012) use of critical race theory to analyze U.S. history curricular standards. In addition, Salinas, Franquis, and Rodriguez (2016) employed LatCrit theory to examine how bilingual elementary teachers inserted their personal experiences to write counter-narratives about Latina/o history. An (2016) used AsianCrit theory to critique the conception of Asians/Asian American in U.S. curricular/learning standards. While these theories can be subsumed under the more general category of critical theory, and the methods used may be categorized as traditional ones such as thematic or discourse analyses, these subfields of critical theory contribute to the ways in which non-Western or nondominant populations conceptualize knowledge and add to our understandings of research.

Looking Forward: Researching People's Perspectives on the Past

As the section on reform methodologies suggests, there are several newer or reform-based conceptual/methodological approaches that history educators can employ to broaden our understanding of how people make sense of the past. While new or underutilized methodologies will make for interesting reading, what's most important, original, or path-breaking are studies that ask important and interesting questions about how we make sense of and use the past. Returning to the three traditions in history education research with which we began the chapter, we find that the third tradition, centered around the concept of historical consciousness, is the least explored, at least in research written in English, and has great potential for expanding the field. The concept of how people *use* history or their understandings of the past to make sense of their current conditions and future possibilities is still underrepresented. Moving beyond disciplinary and sociocultural approaches, studies of historical consciousness may enlighten researchers as well as policymakers and practitioners about the utility of history and history education in people's everyday lives.

That said, new generations of scholars will continue to use traditional and newer conceptual frameworks and research methodologies to push the field forward. International networks are a fruitful means to diversify the field, and cross-national contacts have flourished through individual interactions and professional organizations, such as the American Education Research Association in the US and EUROCLIO and the History Educators International Research Network in Europe. We imagine that opportunities for collaboration will continue to fertilize the field and generate more nuanced and sophisticated inquiries. We look forward to the future of research on how people understand and use the past to shape the present and the future.

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4

Narratives of Black History in Textbooks: Canada and the United States

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Scholars including Loewen (2008) and Sadlier (2007) have indicated that history textbooks in Canada and the United States tend to marginalize Black history in favor of heralding the histories of those who are wealthy, White, heterosexual, and male. Black history advocates in both countries have pushed to improve Black history representation in the curriculum (Banks, 2004; Sadlier, 2007; Woodson, 2000). For example, *The African Canadian Roads to Freedom* curriculum developed by the Greater Essex County District School Board of Ontario, Nova Scotia department of education's African Canadian Studies (ACS) classes, and the Toronto district school board's Afrocentric curriculum and secondary programs, highlight increased efforts at institutionalizing Black history in Canada (Dei, 1995, 1996; Finlayson, 2015; Thompson & Wallner, 2011). In the US, Philadelphia city schools require a Black history course for high school graduation (Sanders, 2009). Black history mandates such as the Amistad commissions of New Jersey, New York, and Illinois, the African American history task force in Florida, and the 1696 historical commission of Rhode Island are indicative of increased emphasis on Black history in the US (King, 2017).

As precollegiate Black history in Canada and the US increases, so does the number of Black history textbooks published by large companies. Three Black history textbooks, *Black History*: *Africa, the Caribbean, and the Americas* (Sadlier et al., 2009), *African American History*, 2nd edition (Hine, Hine, & Harrold, 2011), and *From Slavery to Freedom*, 9th edition (Franklin & Higginbotham, 2011), are the focus of this study. Research on Black history textbooks has explained their basic structure (Finlayson, 2009), gender representation (King, 2015; Woyshner & Schocker, 2015), and racialized depictions (King, 2016a; Simmons, 2015). More research is desired as to how Black history textbooks differ from traditionally Eurocentric history textbooks. While the obvious quantitative presence of Black history exists, the qualitative representation of Black history in these textbooks is of the most concern. On the topic of race,

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traditional history textbooks lack nuanced racial discourse (Brown & Brown, 2010; Montgomery, 2005). This chapter seeks to interrogate how current Black history textbooks discuss race and Blackness through the construct of revisionist ontology (Mills, 1998).

Revisionist ontology is the effort of racialized groups to self-define their racial selves when involved in racial projects (like textbooks) that normalized, through White supremacy and racism, their existence in stereotypical, negative, and demeaning ways. This racialized process led to a classification system that constructed them as less than human or what Mills (1998) refers to as "subpersons." People subjected to this racialization process attempt to revise, repudiate, and redress their racial identity. We are reapportioning the Black history textbooks as revisionist ontological mediums, where Black history narratives reorient the way Blackness is understood. We give language to how Black history textbooks redress racial identity through three salient principles of revisionist ontology, Black epistemology, the Black aesthetic, and Black intersectional analysis.

Our chapter is broken up into three parts. First, we discuss the various ways precollegiate Black history literature has been classified in Canada and the US. We explain the reasons as to why precollegiate Black history has been a source of contention and why various interest groups and scholars have argued for its implementation. Second, we discuss the history of Black history textbooks and how the contemporary Black history textbooks represent race through the three revisionist ontological principles. Third, we conclude with some discussion points for reconsidering how we read, interpret, and teach Black history in Canadian and U.S. schools.

Literature Review: K-12 Black History in Canada and the US

We define Black history as the histories of Black people who are decedents from Africa and located throughout the African Diaspora. Therefore, while our focus is on Black history curriculum in Canada and the US, our conception of Black history is not limited to those geographic regions. We explore key scholarly arguments about the need to establish precollegiate Black history as official curriculum. Our literature derives from three different approaches to Black history: Afrocentrism, Black/Ethnic studies, and Multicultural Black history. We understand that these ideologies are similar and not identical. These constructs have characteristics that speak to ideas that promote Black history as foundational to efforts at presenting a curriculum that is holistic and humane, and that challenges White epistemic ways of knowing. Due to space constraints, we are limited in exploring these differences but refer readers to salient studies that explore these concepts in depth (Dei, 1993; Grant, 2008). In what follows, we explore literature on Black history curriculum, Black history instruction, and Black history's influence on Black students.

Black History Curriculum

Scholars have argued for over a century that Black history in Canada and the US has been largely invisible and silenced within traditional history classrooms. When Black history was featured, the narratives were consistently plagued with

historical bias and distortions. Education research reviewed below has explained that these exclusions were purposeful to maintain racist ideology, that is, to extoll White superiority and Black inferiority. The school curriculum was part of the racial apparatus to provide racial knowledge about society. The exclusion of Black people and the inclusion of denigrating narratives about Black pathology signaled that Black people were naturally inferior to Whites. The history textbooks were instrumental in expressing those racist ideas to schoolchildren.

Elson (1964) highlighted 18th- and 19th-century history textbooks and concluded that the "African race was clearly regarded as the most degraded of the races" (p. 87). She explained that Black people were described as monsters, barbarians, and destitute of intelligence. Textbooks even used religion as means to solidify the point of Black inferiority. Take, for instance, the narrative in *Choice Literature* (Williams, 1898) about God and Black existence:

> He [God] first made the Black man, realized He had done badly, and then created successively lighter races, improving as He went along.... To the White man He gave a box of books and paper, to the Black a box of tools so that he could work for the White man ... which he has continued to do. (p. 117)

The remark about Black people as natural servants to White people was an attempt to justify the institution of slavery. While Black history was mostly silenced in mainstream textbooks, the attention it did receive revolved around Black people as slaves. Reddick's (1934) U.S. history textbook analysis solidified that point and indicated that narratives around slavery constituted Black people as happy, docile, and childlike individuals. Textbooks presented an imagery that Black people were better off as enslaved than free in Africa. Textbooks also justified slavery with the claim that Black bodies were uniquely designed to be "good field hands" and "abled to stand the summer heat better than the white man" (p. 228).

While slavery served as an example of historical bias in the curriculum, early textbooks also revised Reconstruction and racial violence narratives to justify White supremacy and Black subordination. W. E. B. Du Bois (1935) revealed that U.S. history textbooks presented narratives remarking that Black people were "shiftless and sometimes vicious freedmen" (p. 712). Narratives insinuated that Blacks were to be blamed for Reconstruction and needed to be controlled. One mechanism for control was the Ku Klux Klan, which was constructed sympathetically. Take Rugg's *A History of American Government and Culture* as an example:

> The force used by the Klan was sometimes brutal and wrong, but so were the things the carpetbaggers were doing. The latter were often corrupt, and their Negro tools were, with a few exceptions, illiterate and incapable of governing. Thus the white planters, deprived of other means of protection, attempted through a secret organization to "fight fire with fire." (Rugg, 1931, pp. 367–368)

In Ontario, Canada, history textbooks from the 1940s through the 1960s also portrayed racial violence through the role and involvement of the Ku Klux Klan

and Nazi Germany. However, these racial events are described as a "fault inherent to America" and the "mad man" personality and irrationality of Hitler and Nazi Germany (Montgomery, 2005). Montgomery (2005) posited,

> The knowledge of racial discrimination/prejudice privileged by this set of textbooks was that it occurred in spaces outside Canada and could be understood as irrational, caused by difference, and perpetrated by abnormal individuals and groups during extreme circumstances or under isolated conditions. (p. 433)

Montgomery identified the denial of Canadian textbooks and history curricula and their failure to acknowledge the country's racist past. This absence further perpetuates a narrative of Canadian acceptance and tolerance despite its history of White supremacy.

Early-20th-century history textbooks followed similar patterns that apologized for White supremacy while simultaneously presenting Black people as "handicapped by racial and cultural backwardness" (Moreau, 2004, p. 169). Very few textbooks challenged these narratives, marking school history as a salient apparatus facilitating racial attitudes of Black inferiority and White superiority. Much of this language was prominent in social studies textbooks until the mid-20th century (Nash, Crabtree, & Dunn, 2004).

While the egregious language has been eliminated, scholars continue to document the glaring omissions of textbooks and curriculum resources and the failure to examine and discuss the complexity of Black history as well as the role and impact of race and racism (Brown & Brown, 2010; Montgomery, 2005). Montgomery's (2005) extended analysis of contemporary high school history textbooks in Ontario, commissioned for use in 2000, revealed a more focused attention to racism than in previous textbooks from the 1940s and 1960s. This attention to racism, however, identified Aboriginals (First Nations) as the only group of people impacted by racism in the 19th century. Unfortunately, the modern-day racism as described by the experiences of Black students at a Montreal University in two textbooks (Bain et al., 2000; Fielding & Evans, 2000) is questioned, thus perpetuating the victim status narrative. According to Montgomery (2005) this narrative "allows little room for elaborating upon the effects or illustrating their lasting impact for the group or individuals wronged" (p. 438). Similarly, Brown and Brown (2010) also found that portrayal of racial violence toward Blacks as well as Black resistance were prevalent in 19 elementary, middle, and high school textbooks, yet the narratives failed to associate such acts with the overarching system of institutional and structural racism.

As with textbooks, Black history curriculum standards are limited. Journell (2008) recognized that point by noting that Black history standards focused on liberation and oppression within the contexts of slavery, Reconstruction, and Civil Rights. Anderson and Metzger (2011) found that state standards about Black people during the American Revolution, early U.S. Republic, Civil War, and Reconstruction were included throughout the units of study but the systematic institution context of slavery and racial hierarchy was trivialized. While the Civil Rights Movement is noted as a popular topic within state standards and has

influenced students' knowledge, especially about how students see Black people as famous historical characters (Wineburg & Monte-Sano, 2008), the Southern Poverty Law Center's report, *Teaching the Movement 2014*, graded the majority of states with Ds and Fs for their civil rights curriculum (Southern Poverty Law Center, 2014). Overall, the increased representation of Black history closely resembles what Vasquez-Heilig, Brown, and Brown's (2012) study on Texas social studies standards revealed as an *illusion of inclusion*. Despite the inclusion of race and Black history in the standards, the role of racism particularly from an institutional level is obscured, leaving students with an inadequate understanding or representation of the Black experience.

Black History Instruction

With textbooks and curriculum standards limited in their depiction of Black history, teachers are called on to be the curriculum gatekeepers (Thornton, 1991) of how Black history narratives are depicted. Yet, teachers generally have failed to have enough Black history knowledge to critically engage the curriculum. Teachers do feel a need, however, to expand Black history knowledge as noted in the report *Research into the State of African American History and Culture in K-12 Public Schools* (Oberg & Kartchner, 2016). This study, conducted for the National Museum of African American History and Culture (NMAAHC), surveyed 525 elementary, middle, and high school teachers who admitted to teaching the subject more in their classrooms than state standards required. According to the teachers, African migration, *Brown v. Board of Education*, the impact of the Civil Rights Movement, and the election of Barack Obama as President of the US were the most taught. Yet, the evaluators surmised that the teaching of Black history only accounted for around two classes or 9% of total class time throughout the year.

The study also indicated barriers as to why teachers exclude Black history teaching. These include lack of content knowledge, time, resources, and students' maturity levels for approaching difficult topics such as race and racism. While the findings from the NMAAHC are consistent with other studies related to why teachers teach or do not teach Black history, the study was limited in how teachers make decisions regarding Black history teaching, classroom observations on pedagogies, and what type of Black history knowledge was favored in classroom spaces.

Much of the literature has indicated that teachers' Black history instruction is poorly constructed. With a heavy reliance on textbooks, teachers may miss the nuance of topics salient to Black historical experiences such as race, racism, White supremacy, and the diversity of Black culture. These silences or misconceptions can lead to King and Brown's (2014) argument that Black history consists of "decontextualized narratives, stereotypical constructs, and unfulfilling images of Black heroes and heroines" (p. 24), or what they call the typical Black history pedagogies. These pedagogies also are uncritical approaches that do not expand knowledge, promote Black agency, or recognize White supremacy and racism.

Take for instance Ms. Kuperberg (pseudonym), the teacher-participant from Chikkatur's (2013) ethnographic study of an advanced African American history class. Ms. Kuperberg, a White teacher in her 20s, taught 30 students of various

racial identities during the initial year of the newly created African American history course. While Ms. Kuperberg utilized various pedagogical approaches such as lectures, videos, discussion, and role-plays, much of the content consisted of surface level knowledge and regurgitated narratives from elementary school about African American victimization (slavery) with limited agency (Civil Rights). This teacher's approach left her students with a superficial knowledge about race and racism.

Bery's (2014) examination of a theatrical reenactment of slavery at an elite private school is another example of poor Black history pedagogic implementation. The play's curriculum developed out of the school's newly created Black history curriculum. According to Bery (2014), the play as pedagogy reinforced White supremacy because the narrative displayed Africa, enslavement, and Black agency deeply rooted in antiblackness. For example, the narratives on Africa situated Africans as "violent enslavers and slave traders, predators of their own people … lacking moral qualities … [and] social quality of kinship" (p. 345). The pedagogy of the play did not account for the "historical-racial schema" (p. 346); that is, Black students because of their historical legacy are connected with slavery, so the act is psychologically violent, while for White students playing slaves had limited impact because the history is not theirs. In other words, Black history pedagogy has a special kind of knowledge that has to be carefully considered and historically situated. While some drama or role-playing Black history pedagogies are said to be effective (Baptiste, 2010; Husband, 2010), the implications of reenactments of enslavement and Black history are an act of psychological violence.

A few studies have chronicled some effective Black history pedagogical approaches. Take for instance Blum's (2012) self-study of his class on race and racism in a Massachusetts high school. With class discussions, field trips, and case studies, along with critical readings about race and racism, Blum created a classroom that allowed for discourse and critical analysis of how history and race intersected into contemporary society. While the classes were sometimes uncomfortable, students' engagement with the curriculum materials provided for a rich learning experience about the Black experience in America. In Nova Scotia, the collective efforts of educators invested in and committed to the cultural sustainability of African heritage demonstrate the exceptional ways Black history is developed and taught in parts of Canada. Finlayson's (2015) study of Canadian teachers' development of the African Canadian History 11 program shows the need to gather and create curriculum resources to appropriately teach and engage students in the history and the importance of doing so. The assignment with ArtsSmarts Nova Scotia, a program connecting students with African Canadian artists, was an effort to infuse Black history with arts. According to Finlayson (2015), the activity not only provided students Black history knowledge but helped develop critical thinking skills, creativity, and problem solving to name a few.

Several Canadian and U.S. scholars suggest the incorporation of an Afrocentric orientation and pedagogy to the teaching of Black history (Asante, 1998; Dei, 1996; Hilliard, 1997; Karenga, 1995). From this holistic approach, teachers teaching Black history need to be socially and politically aware of various contexts in

society. According to Dei (1996), this awareness and knowledge is foundational to a successful teaching practice because of its transformational ability to engage students in social activism. Afrocentric pedagogy is not the only component for good pedagogical practices. Other scholars have suggested anti-racist pedagogy, culturally relevant, critical race pedagogy, critical multiculturalism, and Black/ethnic studies pedagogies as ways to enhance Black history instruction.

Scholars of these various pedagogies indicate that for a Black history class to be effective the teacher needs to have access to expansive Black history knowledge (King, 2014a). Research conducted by Baptiste (2010), King (2016b), Pollard and Ajirotutu (2001), and Sanders (2009) has chronicled the influence of teachers who were participants in Black history professional development sessions or advanced Black history academic training. Some of the studies indicate that teachers who participated in additional Black history education, and had institutional support, conducted Black history more effectively.

Baptiste (2010) studied three history teachers' (two Black and one White) implementation of Black history. The New Jersey teachers participated in professional development sessions conducted via Amistad Law, a commission that oversees the state-mandated Black history law in the state. Baptiste (2010) notes that the teachers credited the Amistad professional development series in enhancing their pedagogy. A teacher in her study, Mr. Hotep, organized his history classroom around the five pedagogical methods suggested by the Amistad legislation. One example is the use of provocative texts and images where Mr. Hotep used images of racist memorabilia, stereotypical images of rappers, and advertisements with Black face characters. These provocative images helped develop Mr. Hotep's goal of critical consciousness (Freire, 1970) in the classroom where critical analysis was done with images and texts in an effort to connect Black history to the contemporary.

Yet, some studies identified that the use of Black history professional development, particularly programs that focus on content, have not been enough to fully enable teachers to develop pedagogies particular to Black history. For example, Sanders' (2009) study of Philadelphia social studies teachers and their teaching practices with the newly designed Black history course found that teacher-centered pedagogies did not necessarily improve the quality of a history course specifically dedicated to Black history. In addition, King's (2016b) study of four preservice teachers and their interaction with a rigorous summer reading program around Black history indicated that while knowledge about Black history increased, the knowledge did not transfer into time dedicated toward the subject or various engaging pedagogies.

Black History and Black Students

The discourse for Black history inclusion also has sociocultural factors related to racism, Black student school achievement, and mental health. Scholars have suggested Black history is instrumental to Black students' psychological, cultural, and academic wellbeing (Adams, 2005; Grant, 2011; Livingston, McAdoo, & Mills, 2010; Merelman, 1993). Based on Canadian and U.S. history textbooks' mostly Eurocentric focus, Black students, as Woodson (2015) argued, have

contentious relationships regarding the representation of Black history in traditional textbooks. Six Black students (ages 16–19) in Woodson's (2015) study, "*What You Supposed to Know": Urban Black Students' Perspectives on History Textbooks*, questioned the authority of history textbooks as factual, even remarking that school history is a lie or at least not completely truthful. For example, Crystal (pseudonym, female participant) reflected,

> I was always like kind of not with it … like always like this don't seem like right, like how Black people would just disappear from total moments…. My last history book was like five hundred pages. Like, you can't make up five hundred pages worth of writing. But still it's like, how do you know what stuff is for real and what somebody made up? … And if you don't know, then like, you have to trust it until somebody tell you different. (Woodson, 2015, p. 61)

Similarly, Codjoe (2001) and Thornhill (2016) found that Black students felt disconnected from the official history curriculum. The students explained that Black history in schools overemphasized racial progress, provided limited context, and underemphasized or ignored Black peoples' contributions. Kwame (pseudonym) in Codjoe's (1997) study related,

> One time, I got into a big argument with a teacher. We were doing the history of the world. When it came to the history of Africa, the teacher said Africa's history started from 1773 [*sic*] when the White man came. I said this is foolishness. Africa's history didn't start with the arrival of the White man. I pointed out to the teacher that when it came to do the history of Russia, he talked about way back when…. But when he talked about the history of Africa, the only thing he talked about was when the White man came. That's my experience … it's not Black things. It's when the White people came and how the Black people kind of fitted in. That's about it. (pp. 174–175)

While contentious feelings about the history curriculum are tied to Black history redundancy throughout grade levels, contentiousness is also felt when Black students attempt to expand the master narrative and are rejected by teachers. For example, Epstein (2010) described that teachers would oftentimes ignore or silence Black students' engagement with Black history. A teacher in her study taught her students that "white slave owners beat or whipped blacks who disobeyed orders" (p. 58), but when Black students attempted to provide additional anecdotes of slave amputation, sexual assault, and the aftermath of slavery after emancipation the teacher ignored their inquiries. These contentious relationships lead many Black students to ignore those traditional narratives and seek out alternative knowledge through independent research, consulting with family members, and creating sovereign spaces to discuss or highlight inconsistent Black history narratives (Thornhill, 2016).

The lack of Black history, scholars argue, is one of many reasons why Black students fall behind academically. To remedy this problem, several scholars

advocate for the increased presence of Black history in history classes or for having separate Black history courses in schools. They argue that Black history is a way to connect culturally to Black students, therefore increasing not only their interest in history classes but self-confidence that is influential on their overall academic performance (Asante, 1991; Dei, 1993; Kymlicka, 1998; Sleeter, 2011).

In response, school districts, states, and Black homeschool parents have increased access to Black history courses (King, 2017). Scholars purport that Black history has an effect on increased academic interests as well as providing for positive learning environments (Dei, 1993; Ekwa-Ekoko, 2008; Lee, 1992). A survey of U.S. Black homeschool families conducted by Ray (2015) reveals that almost 40% of the parents indicated that teaching more Black history and culture to their children was a motivating factor. While discrepancies exist as to whether parents' motivations were particular to Afrocentrism (Ray, 2015), Black homeschool parents purposefully include Black history to rectify what they feel is a destructive Eurocentric history curriculum in order to develop Black children who have a positive self-identity (Fields-Smith & Williams, 2009; Llewellyn, 1996; Mazama & Lundy, 2013).

Developing self-confidence and self-identity through Black history is closely aligned with psychologists' summation that Black history knowledge serves as a model for improving mental health for Black students. Chapman-Hilliard and Adam-Bass (2016) argue that Black history knowledge fosters psychological liberation, which considers how Black students internalize learning a Black history that is centered through oppression. This *Black history-as-oppression* paradigm has negative psychological effects as to how Black students view themselves. Psychological liberation happens once a conceptual shift occurs when oppressive Black history narratives begin to "acknowledge the strength, accomplishments, and creativity of Black people throughout their history" (p. 481). Citing arguments made by Carter (2007) about *race-based traumatic stress* and Helms, Nicolas, and Green (2012) about *ethnoviolence*, Chapman-Hilliard and Adams-Bass (2016) also argue that Black history knowledge can serve as a tool for navigating racial encounters in schools and society, a similar argument made by King (2016b), who claims that Black history serves to increase racial literacy.

Black History Textbooks in Canada and the US

Black history textbooks used in schools can be traced back to the late 19th and early 20th century (King, 2014c). The first generation of Black history textbooks were developed between 1890 and1950 and primarily used in the US. Educators such as Edward Johnson, Booker T. Washington, Leila Amos Pendleton, and Merl Epps wrote Black history textbooks used regionally at predominantly Black schools (King, 2014c). Led by Carter G. Woodson, who wrote five Black history textbooks and one supplementary book on Africa, many of the Black history textbooks were characterized by their emphasis on ancient Africa and heroification narratives. It was not uncommon for these textbooks to include entire chapters solely on influential Black history figures. The key textbook during this period was Woodson's *The Negro in Our History*, until John Hope Franklin's *From Slavery to Freedom* was written in 1947 (Zimmerman, 2002).

The second generation of Black history textbooks was developed from 1960 to 1980. Whereas the first generation of Black history textbooks was foundational to introduce the concept of Black history, the second generation began to explore its theoretical purposes. In many ways, Black history not only was a subject for exploration but could be used for liberation. Coinciding with the Civil Rights Movement in the US, Black history textbooks fell into two categories: Black history that was apolitical and subtle and that coalesced with the traditional dominant narratives, and Black history that provided a nationalist intent and cultural self-identity (Harlan, 1969; Hare, 1969). To keep up with the demand of students who wanted Black history courses in schools, many school districts developed their own Black history textbooks. During this period of Black history textbook development, Larry Cuban (1964) and John Hope Franklin (1967) wrote Black history textbooks that were extremely popular across the US (Levey, 1970).

The third generation of Black history textbooks was developed in the 1980s–1990s; they were heavily influenced by the culture wars happening in Canada and the US (Cornbleth & Waugh, 2012). Canada during this time introduced one of its first African-Canadian history textbooks, *The Freedom-Seekers: Blacks in Early Canada* by Daniel G. Hill of the Ontario Black History Society (Sadlier, 2007). This period defined Black history curriculum by two educational movements: multiculturalism and Afrocentrism. While few new Black history textbooks were developed through this period, Afrocentric scholars did develop curriculum materials, such as the S*ocial Science African American Baseline Essays* by John Henrike Clarke (Hilliard, 1987) that focused on African history, the U.S. Black experience, and Black agency against racism. The *Baseline Essays* were used as a foundation for many other Afrocentric curricula in school districts in Atlanta, Oakland, Toronto, and Washington, DC.

The fourth and current generation of Black history textbooks has emerged since 2000. Published through large textbook companies, six Black history textbooks currently exist on the market between Canada and the US (Asante, 2001; Gant-Britton, 2009; Franklin & Higginbotham, 2011; Hine et al., 2011; Middleton & Stokers, 1998; Sadlier et al., 2009). We specifically focus on *Black History: Africa, the Caribbean, and the Americas* (Sadlier et al., 2009), *African American History*, 2nd edition (Hine et al., 2011), and *From Slavery to Freedom*, 9th edition (Franklin & Higginbotham, 2011). Each textbook's historical trajectory begins with ancient Africa and moves into modern eras. The textbooks are plentiful in images as well as primary source documents giving voice to Black historical actors. Topics centering around oppression, resistance, and freedom are dominant in each unit. Cultural histories including African/African American art, dance, music, and literature also are displayed throughout. One major difference centers on Black ethnic and modern African history. While *African American History* and *From Slavery to Freedom* present some information on Black ethnic groups and modern Africa, such as on immigration and Apartheid, *Black History* includes a more thorough and diverse presentation of Black ethnic and African Diaspora history, dedicating entire chapters to the Caribbean, Latin America, and modern Africa.

Our analysis of these textbooks will rely on three revisionist ontological principles: Black epistemology (recognizing specific Black ways of knowing), the Black aesthetic (recognizing Black bodies as beautifully human), and Black

intersectional analysis (seeking multiple identities informing Blackness). These principles help give a language of Black agency, the way Blackness is redefined and redressed through textbooks.

Black Epistemology

Since revisionist ontology is concerned with epistemology, the question of what is Black history is a salient one. Black history purposes and meanings, however, have been undertheorized within both the historical and the educational fields (Dagbovie, 2015). While the question may seem obvious, ambiguous, or even irrelevant to some who may propose that the subject is simply history with a focus on Black historical actors, this definition excludes any understanding of Black epistemology. Dagbovie (2015) notes that Black history "strives to interpret why Blacks thought and did what they did at various times in the past" (p. 28). Therefore, Black history is not narratives that focus on "what was done to Black people or token historical references" (p. 28) but instead narratives that specifically locate the experiences, ideologies, and events affecting and relating to the lives of persons of African descent.

For instance, while mainstream Canadian and U.S. history textbooks may begin with Western European powers as the founders of the respective countries, all of the Black history textbooks begin with the continent of Africa as their historical origins. In *Black History*, Chapter 1, "Africa: the Birthplace of Humanity," specifically notes that Africa should be learned not from "Europeans' point of view … but from an African perspective" (Sadlier et al., 2009, p. 20). The text does this by featuring geographical landscapes as well as the cultural, linguistic, scientific, agricultural, and navigational achievements of the continent's diverse set of ethnic groups. For instance, *Black History*'s "African Influences on Modern Art" section reads,

> Traditionally, the power of African art came from imagination and emotion. It expressed the spiritual, emotional, and psychological elements of life as it explores the people's mystical and religious experiences. They often presented their art as abstract interpretation of the natural world. (p. 64)

The textbook goes on to explain that "traditional European art was based on realistic representation of the world" (p. 64) and artists such as Pablo Picasso and Georges Braque wanted to break from European tradition. They found inspiration in African art, thus the modern art movement of Cubism, which changed Western art, was credited to their desire to mimic African artists.

Another example of Black epistemology is found in both *African American History* and *From Slavery to Freedom* through the context of African slavery. Both texts describe how slavery was a global phenomenon and a prominent feature within African society. Islamic empires, such as the Senegambia, Benin, Kongo, and the Sudanese, were heavily complicit in the slave trade. The slave trade in Africa was extensive and was a source of wealth for many African empires. The texts juxtapose the differences between African-based slavery and

American-based slavery. In many African cultures, the enslaved were from stateless societies, were casualties of war, owed debts, were poor, or were mostly women and children who served as wives, concubines, household servants, and agricultural laborers. In contrast, American-based slavery enslaved more men, who became agricultural laborers, unlike the enslaved men in African society, who were more frequently soldiers (military slaves) and domestic servants.

African American History described how enslaved Blacks became "chattel—meaning personal property—of their masters and lost their customary rights as human beings" (Hine et al., 2011 p. 34). In contrast, in some African societies some "slaves were able to harness considerable control over their lives and even enjoy wealth and influence" (Franklin & Higginbotham, 2011, p. 11). *Black History* indicated that those who were enslaved with the military gained social status. In some African societies, the enslaved had a familial connection to the owner and the sign of slave ownership equated wealth. *From Slavery to Freedom* indicated that this process was symbolic of how the economic system was developed in African societies. Instead of property being the sign of wealth, as in Europe and the Americas, wealth encompassed the kinship group, which in parts of Africa could include African slaves. Therefore, the humanity of many African slaves remained intact as part of the kinship group, which differed from the slavery as property dimension that was facilitated in the Americas.

The notion of race and slavery is also explicated through a Black epistemological framework. While *Black History* indicated that Arabs had racist attitudes and could have begun mass enslavement of Black Africans, *African American History* and *From Slavery to Freedom* remarked that race in ancient Africa and Europe was not the primary marker for someone to be held in bondage. Initially, African and European countries would sell White Europeans, mixed-race North Africans (called Berbers), and Blacks from south of the Sahara (Hine et al., 2011). *African American History* also provided a counter-discourse to the belief that the Atlantic slave trade was caused by Africans selling Africans:

> Interethnic rivalries in West Africa led to warfare that produced these slaves during the sixteenth century. Although Africans were initially reluctant to sell members of their own ethnic group to Europeans they did not at first consider it wrong to sell members of their own race to foreigners. In fact, neither African nor Europeans had yet to develop the concept of racial solidarity. (Hine et al., 2011 p. 33)

"Africans selling Africans" implies a sort of racial disloyalty amongst African people. What *African American History* noted, however, is that race and/or nationality had no tangible meaning to African people; they saw themselves as ethnic groups. In other words, Africans did not sell "their own" because the etymology of "African" or "Black" on the continent did not exist during the slave trade.

Through a Black epistemological approach, these texts attempt to provide a counter-logic to the notion that African-based slavery and American-based slavery were the same institution. Focusing on Black epistemology and African slavery is important (1) to humanize Africans as complex beings whose actions had purposeful meanings but also drastic effects on the continent, and (2) to avoid

absolving the oppressive actions of White people as oppressors of a global racial hierarchical system. The narrative that implies sameness between the two slave systems is an example of White settlers' ideology (Mills, 1998), which lends to the whitewashing of Black history. When White epistemological thought commingles with Black epistemology, the notion of the Black experience might be lost. Therefore, the White perspective becomes the default perspective even for Black history.

The Black Aesthetic

As revisionist ontological texts, the representation of the Black body is essential in reclaiming Black humanity. As Mills (1998) noted, historically the Black body has been the "indicator of diminished personhood" (p. 116). The Black body in relation to having Black skin and Black physical features (i.e., thick nose, kinky hair, big lips), through the White gaze and juxtaposed with White bodies, became the symbol and an inherent marker for inferiority. Black history textbooks, therefore, use what Gates (1998) terms "representation as reconstruction" (p. 129), where textual images are part of a strategy to repudiate the hegemonic ways to look at the humanity of Blackness. While reclaiming the notion of beauty through Blackness was important for Black history textbooks to capture, reclaiming full humanity also was associated with the imagery. Throughout the textbooks pages, readers come into contact with pictures representing the diversity of Black culture, history, and life as well as images that elicit feelings of pain, agony, joy, and accomplishment. In this section, we highlight images that represent the full humanity of Black people.

Ideas of beauty have historically centered on Western preferences. Throughout the pages of these textbooks, pictures of hundreds of diverse-looking Black people redefine the notion of beauty. The images highlight various forms of cultural and historical clothing patterns, accentuated skin tones ranging from fair skinned to dark skinned, and the different styles of hair, on which we will focus. In *Black History*, for example, the Ideas section "Black Hair" describes the historical importance of Black hair to Black people:

> The new consciousness of Black people in the colonized nations of Africa and in North America was reflected in the way that Black people, especially Black women, styled their hair. Hair styles were a symbol of the struggle to create their own standards in a world dominated by European politics and Eurocentric notions of beauty. (Sadlier et al., 2009, p. 238)

Black hair had an important social purpose since the 15th century, was diverse in style, texture, and technique, suppressed during slavery, and was used as a status symbol as well as to be associated with White people.

The section also includes four pictures of Black people with different hair styles. The first picture is of a 1900s Senegalese woman: She stands with a stoic face, erect in posture, with her hands on a wooden beam. She is wearing traditional Senegalese garb with many beads as accessories. Her hair looks to be twisted with beads in her hair with a hair piece. The second picture is of a smiling

dark-skinned man with dreadlocks, wearing a dark shirt with blue, white, and yellow vertical stripes. The third picture is of a young woman with medium brown skin and hair that is natural and curly. The last picture is of a young, lighter complexioned woman with straight hair.

As the antithesis of straight hair, all the textbooks mentioned the Afro hairstyle. *From Slavery to Freedom* noted it became popular during the 1960s–1970s and symbolized the Black Power movement. More importantly it was a style that “defied assimilation and traditional values” (Franklin & Higginbotham, 2011, p. 565). A picture of jazz singer Nina Simone is used as a representation. The dark-skinned Simone’s picture is of her in all black attire smiling with her “hair coiffed in an Afro” (p. 565) as the centerpiece of her activism. While the Afro symbolized Black power and a political statement, women were scrutinized more than men. *From Slavery to Freedom* mentions that, for Black women, the Afro looked masculine and unkempt. They were judged based on traditional European beauty standards. Nevertheless, *Black History* noted that despite the criticism for both straightened and natural hair as well as braids, dreadlocks, and knots, hairstyles are acts of agency as well. Hairstyles are liberating expressions of “beauty, boldness, rebellion, self-confidence, and spiritual consciousness” (Sadlier et al., 2009, p. 239).

Black Intersectionality

As part of a revisionist ontological project, intersectional analysis is to fully underscore Black humanity through the complex and marginalized aspects of identity. To explore intersectional identities within revisionist ontological historical analysis, we borrow from Crenshaw (1989), who introduced the term of intersectionality to explain Black women’s complex experiences in society based on their gender (in a patriarchal society), race (in a predominately White society), and class (in a capitalist society). The concept also encompasses notions of ability, sexual orientation, religion, and age. Intersectionality emphasizes that individuals have intersecting multiple identities, which experience systems of oppression in varied ways. In other words, there exists no singular experience of an identity. When appropriating to history, there is no singular Black historical experience.

A major critique of Black history, even when it presents critical perspectives, is the lack of intersectionality within it. Many traditional Black histories focus on respectable male characters who are often middle class, reside in developed nations, and are heterosexual. What is missing is a multidimensional approach to Black historical study that examines the diversity of Blackness. This section seeks to explore the Black history textbook narratives concerning the intersecting system of gender, sexuality, and class, which are historically shaped by the structures of oppression but met with patterns of resistance (Mills, 1998).

Black women are highly visible through the textbooks, providing a holistic view of Black women’s experiences and voices. The textbooks paint a picture of Black women as strong, resourceful, and dedicated to the cause for freedom, racial and gender equality, health care, and racial uplift. Resiliency and resistance to systems of oppression is also a major theme. As one example, the textbooks

highlighted the plight of Black women's socio-sexual experiences within the institution of slavery. In the subheading "Exploitation" in *African American History*, the authors write of how sexual assault and rape of Black woman was due to the "implicit power and authority" of their slave masters that led to "great distress" (Hine et al., 2011, pp. 200–201).

From Slavery to Freedom adds that "sexual exploitation remained one of the most important distinctions between female and male slave experiences" and "a slave woman's resistance to rape could bring an even more violent reaction" (Franklin & Higginbotham, 2011, p. 150). This sexual exploitation led to assumptions of Black women as being promiscuous. Despite these horrific experiences, many Black women found a way to counter this negative portrayal through narratives like that of Harriet Jacobs, who gave voice to and raised awareness of the sexual violence toward Black women.

One aspect of identity that is often dismissed in the general narrative of history is the exploration and discussion of homosexuality (Thornton, 2003). Failures to challenge and critique heteronormativity in history diminish the lived experiences of many individuals and fail to acknowledge discrimination and oppression associated with sexual preference. Surprisingly, given the critique of Black history that it also marginalizes this aspect of identity, the textbooks make reference to individuals of the gay, lesbian, and transgender communities, homophobia, and movements to provide equal rights and protection. For example, under the heading "Literary and Dramatic Arts" in *From Slavery to Freedom*, the literary work of James Baldwin is mentioned along with his identification as a gay man: "Through his novel *Giovanni's Room* (1956), whose subject was a love affair between two men, Baldwin called attention to his own homosexuality. Baldwin's work captured the social concern of the 1950s and 1960s—racial consciousness, discrimination, and sexuality issues" (Franklin & Higginbotham, 2011, p. 484).

Interestingly, in *African American History* Baldwin's sexuality is never discussed; instead the authors focus on his literary achievements and describe him as an integrationist who "resisted the simple inversion of racial hierarchies that characterized parts of the black power and black arts movement" (Hine et al., 2011, p. 623). A biography profile of Bayard Rustin does acknowledge his identification as a gay man and his fight against homophobia in society. Within the profile, the text includes a quote from Rustin where he argues that the fight for human rights no longer included the Black community but did include the gay community "because it is the community which is most easily mistreated" (Hine et al., 2011, p. 727).

Homophobia is also addressed in both textbooks, and central to its discussion are the criticisms from within the Black church. In the discussion of HIV/AIDS in *From Freedom to Slavery*, the authors argue that "forms of racial perceptions of masculinity and of anti-gay messages from the church, has tended to silence discussions of homosexual and bisexual activity as a cause of the disease" (Franklin & Higginbotham, 2011, p. 619). *African American History* adds, "Tensions have arisen within many black churches over their socially conservative message, patriarchal structure, staid ritual, and lack of social engagement. Gender and sexuality are two key areas in which this has been expressed" (Hine et al., 2011, p. 904). Lastly, in *African American History*, "Gay and Lesbian African

Americans" discusses how the intersectionality between sexual preference and race is analogous due to the "struggle against repression" (Hine et al., 2011, p. 914). In addition, the authors argue that the inclusion of class and sexual identities provides understanding and insight into the lives of African Americans.

Discussion

We argue that the selected Black history textbooks from Canada and the US promote a certain racial discourse that has been absent from mainstream textbooks. These differences encompass more than the skin color of historical characters; it is an ideology that speaks directly to Black people's humanity. Black actors are not just taking a marginal role in the history of their countries, as a speed bump for White progress and to be acted upon through oppression and violence. In these texts, Black people have agency, which is represented through their epistemology, aesthetics, and the various intersecting identities that make them human.

Reconstructing Black history textbooks as revisionist ontological texts is salient for several reasons. First, Black history textbooks present a critical racial literacy for students and teachers to digest (King, 2016b). Since curriculums are racialized texts, most traditional history textbooks' discourses are centered as non-racist (King & Chandler, 2016). By non-racist, we are not implying that race is absent but that race and racism are presented as noncritical through racial liberal paradigms. What happens is that students and teachers understand race and racism as psychological and interpersonal barriers, mainly visible through extreme notions of oppression. The racial knowledge that is encountered through mainstream history comprehends race through skin color and as historically fixed, as something antiquated and as an individual phenomenon.

By contrast, critical racial literacy attempts to explain race in nuanced terms. Race is explained as an invention, something that is real culturally yet not real biologically. It is a social construct whose rules are both innocuous and purposefully taught and passed through generations on both micro and macro levels. Racism is ingrained, not only through individuals but within structures, and will continue to be a persistent problem in global society. Therefore, while legislation (e.g., *Brown v. Board of Education*) gives the impression of equity, and Black symbolism (e.g., Barack Obama) signifies hope, without a dismantling of the racist institutions racism will persist.

Critical racial literacy also insists that race and racism, as concepts, alter by time and geography. These Black history textbooks present a historical distinction about race and Blackness in Africa. The notion of Africans selling Africans, to infer a certain racial betrayal, is an axiom that infers a certain presentism in racial thinking (they are Black, therefore, the selling of other Black people caused their "own" demise in the New World). Through narrative, the Black history textbooks resist essentializing race and Blackness. Instead the narratives identify that race was not an active qualifier at that given historical moment and that Africans saw themselves as distinct, independent, and sometimes rival ethnic groups. Africans, in other words, did not see themselves as a collective racial group in a similar way to how Europeans did not collectively see themselves as White prior to the 1700s.

These Black history textbooks were careful to make those distinctions and explain how Black and White people became racialized, in chapters about the structure, power, and fluidity of race and racism. Given the context that many teachers are *dysconscious*—having an unconscious acceptance of and justification of racial inequality and exploitation (see King, 1991)—about racial matters, many struggle with complicated racial concepts in classrooms. Therefore, the textbooks become the primary resource for teaching. Black history textbooks offer a more nuanced approach to racial literacy that provides a racial grammar that helps diagnose the sociohistorical dimensions of racial formation and how that process has influenced how Blackness is rendered globally.

Black history textbooks as revisionist ontological projects also provide new narratives of Blackness that counter *antiblackness* in history curriculum. Antiblackness—the micro and macro instances of prejudices, stereotyping, and discrimination in society directed toward persons of African descent—stems largely from how historical narratives present Black people. History is used to construct identities that define where people have been, what they have been, where they are, and what they are. History also provides a blueprint for where they still must go and what they still must be. History can legitimize dominant cultures and delegitimize others' historical experiences. History also has the power to elevate certain narratives and silence others, therefore making mainstream characters visible while others are invisible.

Invisibility and noncritical historical analysis of Canadian and U.S. Black historical characters have signified to school children that Black people are insignificant to the ideological growth, physical development, and moral wellbeing of the State. In many ways, official historical narratives represent Black people as problems to be solved (Ladson-Billings, 2003). For example, with little discussion of heritage, the first topic that Canadian and U.S. teachers teach and students encounter with Black people in history is through slavery or some form of oppression. The slavery narrative sets the foundation of an antiblack curriculum as its symbolism transcends history curriculum and slavery becomes Black identity and ontology. Dumas (2016) explained,

> [Black people are] socially and culturally positioned as slave, dispossessed of human agency, desire, and freedom … slavery marks the ontological position of Black people. Slavery is how Black existence is imagined and enacted upon, and how non-Black people—and particularly whites—assert their own right to freedom, and right to the consumption, destruction, and/or simple dismissal of the Black. (p. 11)

The nexus between Black life and society is centered on how history situates Black people. Black actors are largely seen as sites of violence and oppression with limited agency. Black agency is rarely exposed in those contexts. Voices are silenced, giving the impression that Black people were compliant as victims or even that the oppression that was exerted was justified.

It often may be implied that Blacks did not exert agency unless it was through White philanthropy; if agency is explored, what is highlighted tends to align with acceptable Eurocentric standards. Rarely is Black agency defined through

intellectual behaviors or as a standalone effort in the standard curriculum like it was on several occasions in *Black History*, *From Slavery to Freedom*, and *African American History*. The process of revisionist ontology, however, does sometimes equate Black humanism with Black achievement. This nexus between these two categories suggests aspects of antiblackness. If Black historical figures do not fit within certain European standards of historical achievements and greatness, the totality of the various experiences that make up Black histories is dismissed. Countering antiblackness in these Black history textbooks is largely about redefining Black identity and resisting Eurocentric notions of Blackness. Black historical narratives, in many ways, were altered from how does it feel to be a problem to how does it feel to be a solution and contributor to society.

Redefining Black history has two agendas. For one, as revisionist ontological projects, the goal of the Black history textbooks is not to teach Black history but Black histories. The notion of a singular history assumes a single narrative. Singular narratives are hegemonic as the tendency is to promote the majority or mainstream population. The notion of multiple histories is seen throughout *Black History* as the text connects the commonalities within the African diaspora while complicating Blackness and presenting unique histories that broaden the concept of Black people globally.

We contend that teachers and curriculum designers should restructure what are considered Black histories. To do this is to disassociate from traditional historical timelines. In many traditional history textbooks, history moves through a paradigm that is historically important to the dominant White culture. Using this framework already brings deficit historical relevance to Black people's histories because the framework is naturally designed to marginalize people for whom the narrative was not originally intended. What we argue needs to be done is a total reconstruction of Black histories relevant to Black people's historical experiences. For example, historical beginnings are not in Europe but in Africa, White Founding Fathers are not Black Founding Fathers (Black people established their own institutions for free Blacks as well as post-slavery, see King, 2014b), and U.S. independence is July 4 but Black independence is June 19. This approach is truly seen as revisionist ontology because it redefines Blackness within White racial spaces. We understand that this suggestion may be seen as not practical to many, given the racial liberal context of an idealized notion of total racial inclusivity in both Canada and the US. The textbooks examined did alter some but largely resembled the historical timeline of traditional text.

When exploring full humanity in history, the process also requires an exploration into the complexities of being human, which sometimes submits to vulnerabilities and influences that do not always align with the celebratory prisms most histories present. Because of its racial revisionism, the tendency for learners is to highlight the positive portrayals (to present-day minds) of Black culture and persons. What happens is that the same critique that education scholars have on traditional textbooks can be inadvertently replicated in Black history domains.

These Black history textbooks did not fully present Black people as pristine: The narratives of Black males as sexist, as well as of people such as Idi Amin (Ugandan dictator) and Francois and Jean-Claude Duvalier (Haitian dictators), are examples. The textbooks, however, did seem to silence major past

transgressions that sought out complexity of Black humanism and its connection to White supremacy. For example, while narratives accentuating Black emigration to other countries as agency from racial transgression were articulated, what happened after new colonies were set up is largely silenced.

One example is the colonization of Liberia, Africa. The site, endorsed by the American Colonization Society and settled by free Blacks and former enslaved Blacks, became a regurgitation of Western oppression. The new "Black" settlers clashed with the indigenous groups, and while only 5% of the population, the Americo-Liberians enslaved and denied citizenship rights to indigenous groups while establishing a racial caste system with themselves as the oppressor class. While we acknowledge as Trouillot (1995) does that all narratives cannot be involved in histories for the sake of clarity, the textbooks silenced this history and missed an opportunity to explore the influence of Western White supremacy, capitalism, and racial and ethnic classification, as well as definitions of humanity.

As we close, we warn readers that revisionist ontological Black history textbooks like the ones analyzed are geared to how Black people see themselves as historical beings as well as their current state of existence. The framework should not be thought of as a sole strategy to get White persons to identify with Black humanity, although it might be an unintended consequence. In other words, the Black history textbooks are not used to prove Black humanity to White people. Black existence should be enough. We hope that for teachers of Black history, this theoretical framework of revisionist ontology challenges the way they conceptualize, plan, and teach the curriculum. Through our analysis of the textbooks, we also encourage teachers to adopt a similar model when selecting course texts from which to teach. By exploring and incorporating epistemology, aesthetics, and intersectionality, students of Black history gain a greater understanding of the complexities surrounding the experiences of Blacks living in the US and Canada and the earlier global history that led to these experiences.

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Section II

Conceptual Constructs of History Education

5

Historical Thinking: Definitions and Educational Applications

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Those engaged in history education research are confronted with a plethora of references to *historical thinking*. This concept has literally become a "standard" in the theory and practice of history education across the Western world (Keirn & Martin, 2012). Once an obscure scholarly concept underlying research in history, psychology, and education, historical thinking is now trendy, with even video game developers claiming to promote it (Kapell & Elliott, 2013; Kee, 2014). Perhaps both because this work is so recent and because national perspectives on the subject differ, history educators have not fully integrated the growing body of research on the nature of historical thinking into their practice.

Indeed, if the ability to think historically should go beyond the mere mastery of factual knowledge about the past ("know that"), it is still unclear as to what the alleged connection between "history" and "thinking" actually means in conceptual and practical terms ("know how"). Of course, history education around the world continues to be plagued by ongoing controversies over the purpose of history in school: What history should be taught to students? How should we deal with diversity and the histories of minority groups? What obligations do we have to our predecessors and past wrongs? In many cases, answers to these difficult questions reflect fundamental differences over our understanding of and beliefs about history. Any attempt at defining historical thinking thus presents a difficulty: There is no single, agreed-upon definition. Yet, despite researchers' varied perspectives, backgrounds, and possible disagreements over questions of historical thinking, there is nonetheless significant convergence in the literature thanks in large part to the productive exchange network connecting scholars in the Western world.

This chapter aims to bring some conceptual coherence to this field of study, thus offering scholars and practitioners a clearer view of the landscape. It brings together some of the key findings in publications that use the terms "historical thinking," "thinking historically," and the French equivalent *pensée historique*.

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Building on this review, we discovered four major strands that have developed over the past few decades—English, German, Canadian, and U.S. While each has distinctive foundations rooted in the historiographies, philosophies, and pragmatism of its respective national community, they nonetheless have been shaped by transcontinental ideas and streams of thought. These four strands also incorporate a growing body of research that is not distinctively national in definition and focus. Indeed, scholars in Australia, the Netherlands, Spain, and other parts of the world are making important contributions to the (re)definition of historical thinking in education. This chapter seeks to capture the essence of the current literature and help clarify the term in contemporary debates over the nature of history education and practices.

Historical Thinking in England

Beginning in the early 1970s, English researchers led the way toward a new conceptualization of history education. We refer to England rather than Great Britain or the United Kingdom for two reasons: the two universities where the most relevant and influential research has taken place are located in England, and the history curriculum in each of England, Scotland, Wales, and Northern Ireland is unique. Below we offer four key generalizations about the scholarship from England.

Empirical research in England has been significant and highly influential elsewhere. There has been a significant amount of empirical research in England since the 1970s and this work has been highly influential on subsequent work in North America. The initial research was conducted at two major centers. In the early 1970s, just as the "New History" was waning in the United States, researchers at the London Institute of Education began to investigate adolescents' understandings of explanations of actions and then moved to the assumptions underlying their explanations of social practices (Dickinson & Lee, 1978). In 1972 empirical work began in Leeds under the auspices of The Schools Council History 13–16 Project (later referred to as the Schools History Project or SCHP), led by David Sylvester. According to London researcher Peter Lee (2011), Denis Shemilt's 1980 evaluation of this project "was the most important landmark in both research and curriculum development in history education in the UK in the second half of the twentieth century" (p. 138).

In the late 1980s the Leeds and London researchers joined forces to create the Cambridge History Project, which developed a syllabus for 16- to 19-year-olds that was organized around second-order or procedural concepts of evidence, explanation, and historical accounts. While this syllabus was being piloted, the London group began another project, Concepts of History and Teaching Approaches 7–14 (CHATA). This project, which had 320 student subjects, analyzed interviews and student responses to written tasks in order to map changes in ideas about history between ages 7 and 14. It focused on second-order concepts such as evidence, accounts, cause, and empathy (Lee and Ashby, 2000). Ultimately, it defined a six-stage model of progression in historical learning.

This work represented a significant shift to history as discipline. Emphasizing history as a discipline, rather than history as a national narrative about which students were tested for recall of factual information, these researchers distinguished between the substantive content of history, or what history is “about” (trade, class systems, wars, etc.) and second-order or procedural concepts (evidence, explanation, cause, accounts) that shape the way historians “do” history. They also identified colligatory concepts, which involved broad labels that included a time dimension (McCullagh, 1978; Walsh, 1967), such as the age of exploration, the medieval period, the Enlightenment, and the Cold War. To some extent, this work was inspired by an effort to determine if Jean Piaget’s ideas about progression in thinking were applicable to history learning. It was grounded in Jerome Bruner’s (1960) notion of the “structure of the disciplines” and Paul Hirst’s (1965) “forms of knowledge.”

English researchers have made the point very clearly that emphasis on second-order concepts does not imply reduced attention to the substantive content of history (Lee, 2014; Lee and Ashby, 2000). Nor are second-order concepts to be confused with skills. Christine Counsell (2000) has noted the importance of distinguishing between conceptual understanding, or what she called “the big ideas that history generates, such as causation, consequence, change, continuity and so forth” and skills “such as the ability to construct multi-causal explanations” (p. 57). Reinforcing this point, Rosalyn Ashby and Christopher Edwards (2010) cautioned that if we treat concepts as skills we run into the danger of having students view second-order concepts as having “value in themselves independent of knowledge” (p. 34).

Curriculum applications were never intended to produce miniature historians. This was a departure from the work of Bruner and other advocates of the “structure of the disciplines” approach in North America (see Lee & Howson, 2009, p. 255.) English researchers explicitly acknowledged that most students would not become academic historians as adults. Therefore, it was crucial that they learn how historical knowledge is created and use it while still in high school.

Research, curriculum, and student assessment were inextricably linked. By the early 1980s the work of the SCHP was being widely applied in English schools. According to Lee (2011),

> research and public examinations for SCHP were closely linked, and new post-hoc assessment schemes were being developed by examiners. Hence SCHP provided both the impetus and an opportunity for the development of sophisticated assessment techniques providing additional large scale evidence about children’s ideas and historical thinking. (p. 138)

Lee (2011) described the early 1980s examination papers and reports of a member of the Inspectorate as “exemplary and unsurpassed as innovative and helpful guides for teachers” (p. 157). The National Curriculum implemented in the early 1990s presented history as a discipline reflecting this triad of research, curriculum, and assessment.

Lee (2014) has set out a list of five broad findings of the English research on historical thinking (pp. 183–187):

1) "History is not just a matter of common-sense." Students tend to think that people in the past shared their own contemporary beliefs and values but were more stupid (Lee & Ashby, 2001; Shemilt, 1984). As Lee (2011) writes,

> Parts of history degenerate into tales of unintelligible mistakes made by mental defectives. It is only as children abandon the assumption that people in the past saw the world as we do that meaningful history becomes possible for them. Hence they must substitute counter-intuitive ideas for their common-sense everyday life understandings. (p. 136)

   Lee (2011) has also made the point that if children "assume that we can only know what we can directly witness, and that history reports a fixed past (it only happened once, after all) then history is impossible" (p. 136). Children may not understand that there is no fixed past and that history is constructed from available evidence. "Because historical accounts are not copies of the past, but share some of the characteristics of both metaphors and theories, there can be more than one account of 'the same thing' without one necessarily being fake or distorted" (Lee, 2011, p. 136).
2) "Students can develop more powerful ideas about history from at least age seven." The English research indicates that students develop increasingly powerful understanding of second-order concepts. However, Lee cautions that it is important to teach students the deep meaning of these concepts because 14- to 16-year-olds are capable of using specialist terminology "in superficially convincing ways without grasping the nature or significance of the conceptual apparatus to which this terminology pertained" (p. 184).
3) "Progression models can be constructed for some second-order concepts." According to Lee (2011) "much effort has been expended in the UK, both by researchers and by examiners, to produce valid and usable models of progression in children's ideas about history – that is, second-order or disciplinary ideas that give structure to the discipline of history" (p. 137). Lee (2014) points out that English researchers have developed "models of progression for evidence, intentional or rational understanding and the related concept of empathy, for cause, and for accounts" (p. 184). He defines progression as "the development of a second-order conceptual apparatus that allows history to go on, rather than bringing it to a halt, and in so doing changes an everyday view of the nature and status of knowledge of the past into a historical one" (Lee, 2011, p. 139). Lee (2011) further warns that "progression models of the development of students' ideas are, at best, valid for groups, not for individuals, and do not predict individual learning paths" (p. 179) and that they only "hold under current cultural and educational circumstances" (p. 180).
4) "The seven-year gap." "CHATA evidence revealed wide variation in the level of sophistication of ideas to be found in any particular year group. Some seven year-olds worked with ideas typical of 14 year-olds, and some 14 year-olds thought like most seven-year-olds" (pp. 185–186). Lee and Ashby (2000) describe a fourth-grade girl who "tried to reconstruct the situation, ideas, and values of Elizabeth I in order to explain her delay in ordering the execution of

Mary, Queen of Scots, in a way not found in the responses of many eighth-grade children" (p. 214).

5) "Conceptual decoupling." Sophistication in the understanding and use of one procedural concept does not necessarily increase in tandem with another. For example, a student may demonstrate progression in understandings of causal structure but not in rational understanding (Lee & Ashby, 2000, p. 213). As such, it is not possible to talk about overall progression in historical thinking at least in terms of second-order concept acquisition.

Additionally, the concept of accounts (or narratives) has been a central concept in the work of English researchers. As Cercadillo, Chapman, and Lee (2017) note, "It is important … to understand how children make sense of … historical accounts … first, because all history is communicated through accounts (they are, as it were, the medium of history and of history education) and, second, because the accounts that students encounter are frequently conflicting" (p. 5). Accounts/narratives are only beginning to receive the attention of researchers and theorists in North America (see Létourneau, 2014; Lévesque, 2015; Seixas 2016). Lee (2014) suggests a six-stage model that ranges from a view of accounts as merely stories which could be told in different ways but ultimately say the same thing, to an understanding that accounts differ because they respond to different questions (p. 181).

Implications for the English Research

Lee (2014) identifies the need for clearer evidence of the impact of different cultures on students' ideas; the nature of conceptual shifts, and the way in which a concept of evidence evolves from a notion of testimony; and the relationship between students' second-order conceptual development and the degree to which history is "visible" in the school timetable, the library, or in teachers' categorizations of what they were doing. He also advocates for explorations of new questions related to Shemilt's (2009) ideas about students' "frameworks" and "big pictures" of the past. Lee calls for investigations into "how students construct meaningful accounts of long spans of history in ways that enable them to relate past, present and future, and at the same time to investigate the assumptions they employ in doing this" (p. 189) and suggests that questions regarding how students construct meaningful accounts out of the "raw material they receive from parents, media and school" (p. 190) are worth pursuing (also see Chapman, 2011). Another cluster of questions relates to the dispositions students develop with regard to history. He suggests that such research could connect with German historian Jörn Rüsen's approach to history and moral reasoning (discussed below). Finally, Lee contends that the most important cluster of questions concerns "whether, how far and in what respects history education transforms the way in which students are able to see the world they live in" (p. 190).

Historical Thinking in Germany

While English scholarship has defined historical thinking as a disciplinary way of knowing in reference to a model of cognition centered on the understanding of substantive history and second-order, procedural ideas, the German contribution

has relied more broadly on the integrative notion of "historical consciousness." This philosophical concept acquired prominence in historical studies in the 1970s (Jeismann, 1977; Schörken, 1972) as "a complex interaction of interpretations of the past, perceptions of the present and expectations towards the future" (Bracke, Flaving, Köster, & Zülsdorf-Kersting, 2014, p. 23).

For conceptual purposes, we might consider historical consciousness as first concerned with the practical relationship of the past to the present and the "web of temporal change within which our lives are caught up, and (at least indirectly) the future perspectives toward which that change is flowing" (Rüsen, 2005, p. 25). Second, historical consciousness is understood as the mental operations by which these temporal changes in the experience of time are used to orient practical life and guide people in making decisions. Finally, historical consciousness is expressed through narratives that play a central role in making sense of the past to the present and in providing people with a sense of orientation in time. As Rüsen (2005) notes in reference to these principles:

> One coordinate is the procedure and logic of historical narration; a second one is cognitive principles of rationality and truth claims in historical thinking; and a third is the practical function of historical thinking in human life. By these three lines of inquiry and analysis three different modes of understanding history are integrated that used to be presented as conflicting if not contradictory. (p. 2)

Learning to think historically in the German model was not, at least originally, conceptualized as an educational end in itself but as an overarching goal for advancing historical consciousness. History education, in this view, helps promote the acquisition of competencies necessary to participate critically in the broader historical culture. For the purpose of this chapter, we rely on the more prominent scholarship produced in the field of history education over the last two decades (Barricelli, Gautschi, & Körber, 2012; Kölbl & Konrad, 2015; Kölbl & Straub, 2001; Rüsen, 2005). A central model of historical thinking emerging from the German tradition consists of at least five interrelated competencies, or sets of related abilities, judgments, knowledge, and skills, that students should acquire over time:

1) *Asking historical questions.* A central element for thinking historically entails the heuristic competence to formulate questions in regard to fundamental issues originating in everyday practices within a historical culture, that is, the set of discourses in which a society understands itself and its future by interpreting the past (Rüsen, 2005). According to this model of historical thinking, individuals—including professional historians—formulate questions about the past that arise from contemporary issues and cultural needs for life in the present. These questions are then used to engage in a process of historical investigation and ethical judgment about the value and orientation of history in society.
2) *Using a methodological approach.* This competence includes the ability to search, read, and analyze relevant historical sources and narratives for their

historical content, assumptions, and perspective. At a more advanced level, the methodological competence extends to a critical reflection on the relevance of certain approaches to history as well as their limitations. The ability to read, analyze, and deconstruct historical narratives is "a basic operation in this field" (Kölbl & Konrad, 2015, p. 25).

3) *Orientation.* Knowledge gained from historical questions and investigation should offer individuals insight into their own lives, providing them with a sense of temporal orientation related to their own identity. This competence makes it possible to guide contemporary actions in reference to temporal changes, thus conferring to practical life an external and internal temporal perspective in the *longue durée.* For Rüsen (2005), the competence in orientation realizes its function in life through a number of factors of historical consciousness: the important experience of time drawn from the past; the patterns of historical significance over time (*lebensformen*); the mode of external orientation in respect to communicative forms of cultural life; the mode of international orientation in respect to historical identity and the historicity of the self; and moral values and moral reasoning.
4) *Narrative.* It is with this competence that human minds are able to grasp the synthesis of the dimensions of time with those of values, judgments, and life experiences. Such a competence makes it possible to create, in linguistic form, the organized field where history lives its cultural life in the minds of people, telling them who they are and what the temporal change of their life and their world is about. For Rüsen (2005), the narrative competence is overarching in that the competences of historical questions, methodology, and orientation are all necessary for making sense of the past in narrative acts.
5) *Subject matter.* This competence is relevant to all of the above competencies. It deals with the personal use of and reflections on significant historical terms and concepts that structure an individual's own thinking about the past. The knowledge gained from specific results of historical thinking is not the primary focus of this competence (Kölbl & Konrad, 2015).

Implications for the German Research

A major challenge with the German approach has been to operationalize in didactical terms the notion of historical consciousness for the purposes of teaching and learning historical thinking. Vague conceptualizations and models of cognition coupled with poor performances by German students on international large-scale assessments of competencies, such as PISA (Programme for International Student Assessment), have led to major criticism and educational revisions in the German literature (Kölbl & Konrad, 2015; Schönemann, 2012). History educators only recently have begun to work on models of historical thinking competencies that could be defined in pedagogical terms and assessed in classroom context. To date, this didactical work is far from finished, as there is no overall consensus in the literature on one specific model of competencies (Bracke, Flaving, Köster, & Zülsdorf-Kersting, 2014).

So far, international research on competencies in historical consciousness has looked at a number of aspects of historical learning: (1) relationship between

past and present in chronological and societal context (Duquette, 2011; Julkowska, 2014); (2) influence of progress, presentism, and moral judgments on students' historical ideas (Seixas, 2012b; Seixas, Gibson & Ercikan, 2015); (3) analysis of evidence-based narratives (Vass, 2004; Waldis, Hodel, Thünemann, Zülsdorf-Kersting, & Ziegler, 2015); and (4) production of historical narratives for identity and cultural life orientation (Bracke et al., 2014; Carretero, Castorina, & Levinas, 2013; Létourneau, 2006, 2014; Létourneau & Moisan, 2004; Lévesque, Croteau, & Gani, 2015a, 2015b; Tutiaux-Guillon, 2003; van Alphen & Carretero, 2015).

Given the growing importance of historical consciousness in the education systems of countries like Sweden and Germany, studies have also explored the impact of large-scale assessments on the design of instruments and the performance of learners (Eliasson, Alvén, Yngvéus, & Rosenlund, 2015; Körber & Meyer-Hamme, 2015). These examinations are looking not only at the cognitive processes of historical thinking but also at students' own identity and use of narrative frameworks to shape their understanding of history and their vision of the course of time. As might be expected, these assessment strategies have been met with criticism. On the one hand, the related concepts of historical consciousness and historical thinking are still poorly aligned and connected in educational literature, thus leading teachers and educational authorities to construct imprecise models of assessment which lack empirical evidence and replications to test, confirm, and "disconfirm" current findings (Bain, 2015, p. 71). On the other hand, there is no clear correlation between effective large-scale assessments of historical thinking and the kinds of practices taking place in school classrooms. While curriculum guidelines and standardized assessments may include notions of historical thinking, too many teachers are unfamiliar with or have not been trained to teach students how to advance their historical consciousness through thinking historically. The result is a disconnect between formal curriculum expectations and students' own learned experiences (Brookhart, 2015).

Historical Thinking in Canada

In 1968 Trinity College teacher A. B. Hodgetts released *What Culture? What Heritage?*—the findings of the National History Project. Hodgetts (1968) painted a bleak picture, pointing to stultifying teaching methods, student boredom, a dearth of high quality published work on Canada, and an excess of textbooks that offered an idealistic, progress-oriented narrative of Canadian history:

> Canadian history in our schools is a shadowy, subdued, unrealistic version of what happened—a bland consensus story, told without the controversy that is an inherent part of history.... it also assumes that every choice made in the past was the right one, that there could not possibly have been any other. Thus Canadian history becomes a too-nice, straightforward, linear, dry-as-dust account of uninterrupted political and economic progress. (p. 24)

Hodgetts (1968) intended his report to be a wake-up call for the renewal of history in school. He wanted students to experience the "new interpretations of the past," the process of historical writing "which produces opposing viewpoints," and to be aware of the relevance of history (pp. 115–116). Like many critics, Hodgetts was calling for a more critical, disciplinary practice of history as opposed to a bland consensus exercise in storytelling and memorization of national narratives (see also Booth, 1980; Zaccaria, 1978). Unfortunately, the Canadian response was to partially abandon rather than improve history education.

In Canada, as in Germany and the US, there is no national history curriculum because education is under the auspices of the 13 provinces and territories. Most jurisdictions have chosen to mandate the interdisciplinary school subject of social studies (which also incorporates geography and social sciences) rather than specifically history for at least part of the K-12 curriculum (Ontario and Québec mandate history courses, Ontario from grade 7 to grade 10). Nevertheless, it is possible to make two generalizations on the state of historical thinking in Canada. The place of history within social studies programs has become increasingly more prominent over the past decade, as has the place of historical thinking within history (Historica Canada, 2015; von Heyking, 2011).

Developments in history education in the US were very influential until the late 1990s. Historian Geoffrey Milburn (1976) noted, "So pervasive has been the American example that commentators in Canada occasionally seem to read the Canadian social studies experience entirely in American terms, as if the image north of the border was a clear reflection of trends to the south" (pp. 215–216; see also Clark, 2004.). American Jerome Bruner's (1960) structure of the disciplines approach, which advocated that students be taught the key concepts and techniques of inquiry practised by mature investigators in the disciplines, "took root in all provinces during the 1960s" (Tomkins, 2008, p. 267). While this approach was evident in provincial curricula, school textbooks, and teacher education programs (Moore & Owen, 1966; Sutherland & Deyell, 1966), it was not prominent in classrooms (Hodgetts, 1968). By the 1970s there was heavy criticism of this approach as too academic and elitist (Beyer, 1994; Dow, 1992; Massialas, 1992). Bruner (1971) himself called for a de-emphasis on the structure of the disciplines in order to focus on urgent social problems. Provincial curricula were adapted accordingly (see Eisenberg & Levin, 1972–1981, for an example of a teaching resource in this vein.). However, by the 1990s, Canadian critics such as Bob Davis (1995) were pointing out that the emphasis on "cognitive and attitude" (p. 63) skills was to the detriment of historical understandings.

A confluence of scholarly initiatives in Canada around the turn of the 21st century resulted in a warm reception for a historical thinking approach. Peter Seixas's (1996) scholarship was the impetus for a groundswell of interest in re-examining the foundations of history education in North America. Seixas laid out a set of six historical thinking concepts (or second-order historical concepts as the English called them). This conception is rooted in the work of English researchers such as Dickinson & Lee (1978), Portal (1987), and Shemilt (1980, 1987), along with Bruner's emphasis on student engagement with primary historical sources in order to develop their own interpretations. Seen through this lens, history is a form of disciplined inquiry.

In 2001, Seixas was awarded a Canada Research Chair and established at the University of British Columbia, the Centre for the Study of Historical Consciousness, a research hub that attracted both graduate students and international visiting scholars. Prominent international scholars attending the 2001 Theorizing Historical Consciousness conference included Rüsen (Germany), James Wertsch and Samuel Wineburg (US), and Chris Lorenz (Netherlands). The resulting publication, *Theorizing Historical Consciousness* (2004), created fertile ground for investigation and development of Seixas's conception of historical thinking, which was clarified in a number of subsequent publications (Seixas, 2012a, 2012b, 2015, 2016, 2017a, 2017b).

In 2006, Seixas established the Benchmarks of Historical Thinking (renamed Historical Thinking Project in 2011), which became the major focus of his Centre, and advanced definitions of the concepts:

- The problem of *historical significance*: From the entire human past, what is worth learning about?
- The problem of *evidence*: How do we know what we know, how can we use the traces, the leftovers, of the past to support claims about what happened?
- The problem of *continuity and change*: How are historical changes interwoven with continuities?
- The problems of *cause and consequence*: What are the layers of cause that led, over time, to any particular event? What are the consequences that rippled out afterwards?
- The problem of historical *perspective-taking*: What was it like to live in times so different from our own; can we truly understand?
- The *ethical dimensio*n. How can we, in the present, judge actors in different circumstances in the past; when and how do crimes and sacrifices of the past bear consequences today; and what obligations do we have today in relation to those consequences? (Seixas, 2009)

As Seixas (2017b) points out:

> While they look like concepts, the reason they are so generative is that they function, rather, as problems, tensions, or difficulties that demand comprehension, negotiation and, ultimately, an accommodation that is never a complete solution. History takes shape from efforts to work with these problems. Students' abilities to think historically can be defined in terms of their competence in negotiating productive solutions to them. (p. 5)

These concepts have proven influential and have been expanded by other scholars in Canada and internationally (Carretero, Berger, & Grever, 2017; Lévesque, 2008).

The preponderance of research on historical thinking in Canada has focused on the concept of historical significance (Lévesque, 2005, 2008; Peck, 2010; Seixas, 1994, 1997). As Lévesque (2011) points out, "whether people use the past for academic research or contemporary meaning making, whether they are professional historians or history students, they cannot escape the concept of

historical significance" (p. 125). Lévesque's (2008) criteria that factor into a historian's selection of certain events over others include profundity, quantity, durability, relevance, intimate interest, symbolic significance, and contemporary lessons.

It is worth noting that it is the notion of historical thinking rather than historical consciousness that has gained greater traction in English-speaking Canada. It is only in the province of Québec that there have been distinct efforts to bring together these separate traditions (Cardin, Ethier, & Meunier, 2010; Laville, 2004). Catherine Duquette (2011, 2015) developed a theoretical model to investigate the relationship between students' historical consciousness and progression in their historical thinking. In a qualitative study involving 148 French-speaking students in their final year of secondary school, she was able to identify progression in historical consciousness over four developmental levels, proceeding from a view of history as a true and unchangeable account of the past to history as critical interpretation of the past. Her study suggests that students' level of historical consciousness and their understanding of history progress in tandem and offers a tool for assessing this progression. However, Robert Bain (2015) cautions that we know far too little at this time "to understand under what conditions and instructional contexts one can effectively infer the details of historical thinking from the rubric offered [by Duquette] to assess historical consciousness" (p. 71). See Clark (2011, 2014) for comprehensive examinations of history education research in Canada.

Implications for the Canadian Research

As Seixas (2017b) points out, this Canadian model of historical thinking has been accused of being "atheoretical, of omitting attention to the interpretive nature of history, of paying insufficient attention to the dynamic interrelationship of past, present, and future captured by the concept of historical consciousness, and of drawing insufficient connection among six "independent historical thinking concepts" (p. 11). Furthermore, it has been criticized for the wont of attention to:

> the historian's positionality, changing identity/ies and their own historicity; the historicity of the discipline; other contextual conditions (i.e. the role of place) for making and remaking our stories; and, the practices of suspending opinion, showing humility, and asking self-reflexive questions in the encounter with epistemological (and other forms of) difference. (McGregor, 2015, p. 271)

Another challenge relates to the concept of universalism. Historical thinking is unequivocally rooted in Western-Enlightenment thought. Scholars such as Robin Jarvis Brownlee (2009) are critical of Western scholars' perpetuation of "science's exclusive truth claim" (p. 38). Can this way of thinking accommodate other ways of viewing the world? In postcolonial nations with Indigenous populations, and Canada in particular, there is growing demand to recognize "aboriginal historical consciousness" (Carlson, 2010) in historical scholarship. As Aboriginal scholar Michael Marker (2004) has articulated,

> Aboriginal ways of knowing elude more universal theorizing because they are usually conveyed through oral tradition, which frames reality around the storied features of the landscape. The university, on the other hand, is oriented toward the transportability of both knowledge and credentials; it gazes toward a vast ocean horizon, but misses its own reflection. (p. 107)

It is difficult to know how best to reconcile "aboriginal historical consciousness" with scientific reliance on the use of hard evidence to support claims (Lévesque, 2016). As Seixas (2017a) points out, this involves far more than merely including stories of Indigenous peoples in the curriculum: "Rather, it is a call to entertain plural standards of truth, and to accord multiple understandings of the relationships among past, present and future" (p. 68). Seixas (2012a) asks, "Once Indigenous ways of knowing are actually part of the textbook's way of knowing, then who will be able to object to histories based on Islamic cosmology, Biblical fundamentalism and Haitian voodoo?" (p. 136). History as a discipline operates on the basis of open critique of historians' interpretations of the available evidence. Concern about faith-based or Indigenous perspectives is not unique to Canada, as other nations with significant Indigenous populations are questioning the *modus operandi* of the academy and concepts of historical thinking.

This historical thinking framework has had significant influence on K-12 history and social studies curricula (Seixas & Colyer, 2014). Most of Canada's 13 provinces and territories have recently introduced historical thinking into their history and social studies courses, while history textbooks from every major Canadian educational press now reflect a historical thinking approach, according to the nonprofit organization Historica Canada (2015).

It is apparent that historical thinking is also becoming part of teacher professional education (Seixas & Webber, 2014; Sandwell, 2011). It is found in textbooks used in teacher preparation courses (Case & Clark, 2015; 2016; Lévesque, Denos & Case, 2013; Seixas & Morton, 2013) and also ongoing professional development for teachers. Peck (2011, 2014) describes professional development workshops in which teachers were given multiple opportunities to explore and apply Seixas's six historical thinking concepts. Her work highlights the challenges for teachers of understanding these concepts with the depth necessary to teach them, in turn, to students. The approach is also becoming more evident in graduate education programs (McLean, Rogers, Grant, Law, & Hunter, 2014). Furthermore, museum scholars are exploring the potential of this conceptual framework for framing museum exhibitions (Gosselin, 2011; Gosselin & Livingstone, 2016; Larouche, 2016).

Historical Thinking in the US

Building on research from the cognitive sciences, history became the focus of studies in the US investigating how students' knowledge of the past is constructed, students' understanding of historical evidence and human actions, and the social contexts of students' ideas about history (Barton, 2008). Current research in historical thinking in the US is rich and wide-ranging. Summarizing all recent developments is a daunting task considering the federal nature of the

country and the varied regional and educational differences between states. The practices of history education in the US thus reflect "a patchwork of tradition, state requirements, local control, and individual preferences" (Barton, 2015, p. 175). While tentative, it is possible to discern two dominant streams of research on historical thinking: historical thinking literacy and democratic citizenship education. These two streams are not mutually exclusive. Scholars have frequently relied on both approaches in research and practice, yet separating them serves useful conceptual purposes.

The first stream was defined by the work of Wineburg, who advocated for restructuring U.S. curricula according to the "fundamental structure" of the disciplines (following Bruner, 1960). Using a classic knowledge acquisition approach from novice to expert, Wineburg's (1991) original study documented how disciplinary historians read historical texts in fundamentally different ways than students. "The difference in each group," Wineburg (2001) concluded, "can be traced, I think, to sweeping beliefs about historical inquiry, or what might be called an epistemology of text" (p. 76). For students, reading history amounted to searching for facts. Historians, on the other hand, worked through the documents as prosecuting attorneys, questioning and comparing the sources and looking at the motives of their authors.

Wineburg's work explicated three historical thinking heuristics used by historians:

- *Sourcing*: looking at the source type, (sub)text, and author(s) of the sources. Before reading through the entire text, sourcing invites readers to "get their bearings" by looking at its attribution. Who wrote it? When? What type of source is it? What is the reliability of the source? All these questions create a mental framework for readers to situate the source as well as the information and message included. The act of reading is not about "gathering lifeless information" but to engage a human source in "spirited conversation" (Wineburg, Martin, & Monte-Sano, 2013, p. x).
- *Contextualization*: situating a document in temporal and special context. Sources are human artifacts produced in a particular time and place. As such, readers need to understand the context in which the source was produced. Instead of reaching conclusions based on contemporary perspectives and values, critical historical readers ask key questions: What was the context of the author's words? What were the prevailing norms and values of the time? Why did the author produce this source? Contextualization puts into historical perspective the source and helps prevent *presentism*, the imposition of a present-era interpretive framework.
- *Corroboration*: comparing sources with one another. Sources are not produced in isolation. They need to be considered in relation to other pertinent documents of the time to learn more about them and possibly reconcile discrepancies. This process makes it possible to "get a broader understanding of the events," even when these documents disagree on key historical details. Corroboration also helps increase confidence in the accuracy of a source. When multiple sources tend to agree, particularly when coming from different sides, readers can take "greater stock at their accuracy" (Wineburg, Martin, & Monte-Sano, 2013, p. 20).

These heuristics provided the fundamental tools for educators to close the "breach" between school and academia (Wineburg, 1991). In fairness to Bruner's ideas, Wineburg proclaimed that teaching historical thinking could not be subsumed to some broad critical thinking skills taught across the curriculum. Relying on generic skills, in his view, offers precious little about students' ability to read and think historically:

> In our zeal to arrive at overarching models of reading, we often ignore qualities of the text that give it shape and meaning. When historical texts make the journey from the discipline to the school curriculum, we force them to check their distinctiveness at the door. The historical text becomes the "school text," and soon bears a greater resemblance to other school texts – in biology, language arts, and other subjects – than to its rightful disciplinary referent. (Wineburg, 2001, p. 79)

In the last two decades, the contribution of Wineburg has been remarkable, thanks in part to recent changes in U.S. educational assessments focused on common core literacy and numeracy skills (Common Core State Standards, 2010). The Stanford History Education Group (SHEG), under the lead of Wineburg, has developed a *Reading Like a Historian* curriculum that engages students in historical thinking and inquiry skills.

Wineburg's studies have contributed to a growing body of research on youths' ideas about historical evidence (Monte-Sano, De La Paz, & Felton, 2014; Reisman, 2012; Wineburg, Reisman, & Fogo, 2007), historical reading and writing strategies (Hynd, Holschuh, & Hubbard, 2004; Mosborg, 2011; Nokes, 2013; VanSledright, & Kelly, 1998), and use of multiple sources of historical information (Gradwell, 2010; VanSledright, 2002; VanSledright & Afflerbach, 2005; Voss & Wiley, 2000). In this digital age, it is no surprise that the heuristic approach to historical sources also has influenced a wealth of studies looking at students' online searching strategies and uses of web-based sources (Friedman & Heafner, 2007; Hicks, Doolittle, & Lee, 2004; Saye & Brush, 2007; Swan, Hofer, & Lacascio, 2008; Wineburg & Reisman, 2015). Interestingly, Wineburg's (2016) most recent study on the evaluation of online sources suggests that historians' traditional heuristics might be "bygone practices" that do not apply well to the world of the Internet. Recent studies in the field of digital history have questioned earlier assumptions about the notion of "texts" and alerted history educators to the changing meaning of "historical expertise" in the digital world (Kee, 2014; Lévesque, Ng-A-Fook, & Corrigan, 2014; Martin & Wineburg, 2008; Nygrend, 2014).

Perhaps more fundamental, Wineburg's seminal work has forced educators to reconsider the epistemological beliefs of learners and teachers themselves (Kuhn & Weinstock, 2002; VanSledright, 2011). As Bruce VanSledright and Kimberly Reddy (2014) contend, when considering the ways in which people think about history "it is important to acknowledge their epistemological understandings surrounding the nature of domain knowledge" as these have serious implications for what counts as historical knowledge and how that knowledge is acquired (p. 34). Several studies have come to the conclusion that prior knowledge, epistemological beliefs, and "positionality" are essential features to understand how people

negotiate conceptualizations of historical knowledge (Maggioni, VanSledright, & Alexander, 2009; Salinas & Sullivan, 2007; VanSledright & Frankes, 2000). Also, Wineburg's initiative came in time to offer a suitable "response to political demands for a focus on literacy in schools" (Seixas, 2017b, p. 5). The work of Wineburg and his fellow researchers can also provide teacher education (Bain, 2000; Drake & Brown, 2003; Sandwell & von Heyking, 2014; van Hover & Yeager, 2007) and postsecondary history programs with a renewed commitment "to teaching history as a discipline with a unique and important way of making sense of the world" (Keirn & Martin, 2012, p. 490; Westhoff & Polman, 2007/2008).

Yet, this approach to history has not gone unchallenged. It has been criticized for its overemphasis on a disciplinary form of knowledge more attuned to academic education than to the broader educational context and its attention to civic republicanism and the sociocultural milieu in which history learning takes place (Barton & Levstik, 2004; Thornton, 2001). By equating historical thinking to historical literacy, U.S. researchers thus run the risk of closing themselves off from "important questions that concern how the past is used in the present" (Monte-Sano & Reisman, 2016, p. 282). In the context of another "history war" over the nature of U.S. history education (Burack, 2014; Grossman, 2014), it is no surprise that some scholars have proposed a different rationale for school history with a broader place in the overall national curriculum (Thornton, 2001).

Democratic Citizenship Education

The second stream is informed by the traditional rationale for educating democratic citizens (Dewey, 1916; Gutmann, 1987; Parker, 2002). History education came to be defined as a subject to promote citizenship skills in the form of reasoned judgments, deliberation, and activism (Levstik & Barton, 2001; Thornton & Barton, 2010). This conception acquired growing acceptance in U.S. education of what Barton and Levstik (2004) called "teaching history for the common good." Having worked closely with schools, Barton and Levstik (2004) claim that history's place in the U.S. curriculum is best justified in terms of its contribution to "democratic citizenship … and its practices must be structured to achieve that end" (p. 40).

This integrative approach to history education rests on the assumption that (1) people, including students, engage in various historical practices in society, and (2) schools should promote a more active and reflective set of practices necessary for democratic life and the common good. Using a sociocultural lens, Barton and Levstik (2004) revisit Wertsch's (1998) seminal work on mediated action, which calls attention to the cultural tools that aid or limit human agents within their sociocultural context. They propose a combination of four stances for defining the purpose of history in U.S. schools:

- *Identification*: to embrace connections with the past. Students are encouraged to associate themselves with specific people and events in history. Identification helps establish personal connections and continuity with the past and the stories of national origins. It also serves to justify or criticize contemporary social actions. In this sense, identification contributes to democratic citizenship to the extent that it encourages individuals to feel, think, and act as citizens of a larger historical community.

- *Analytic*: to analyze and establish causal linkages in history. A tenet of history education in the US is the emphasis on the critical study of history and the focus on the cognitive processes involved in examining the causes and consequences of historical events. This analytic process involves the understanding of the past for present-day purpose, the search for lessons from the past, and the learning of how narratives are used in society.
- *Moral response*: to develop moral judgments about the past. History is often invoked to promote particular moral responses. Moral responses to past actions can be directed toward a variety of ends (remembrance, condemnation, admiration, and activism) but all revolve around notions of right or wrong. These responses are central to democratic citizenship as public decisions are informed by particular visions of the common good.
- *Exhibition*: to display information about the past. A common approach to history, both in school and in society, is the exhibition of historical information for personal interest or collective endeavours (e.g., personal collections, displays, exhibits). This information provides people with crucial knowledge to make judgments, understand humanity, and deliberate about the common good.

Consistent with the ideas of Wertsch (1998), Barton and Levstik (2004) transpose these four stances into a set of "cultural tools" necessary for students to engage in the act of "doing history" (p. 10):

- *Narrative structure of history*: to understand the format and type of narratives for structuring historical information into coherent representations of the past. Narratives are powerful tools to make sense of the past and commonly used in school and society to shape historical understanding through patterns. However, they have both "affordances" and "constraints" that need to be unpacked (Barton & Levstik, 2004, p. 136).
- *Inquiry as reflective thought*: the process of asking meaningful questions, searching for and evaluating evidence, and developing conclusions. This scientific approach to various domains of knowledge helps prepare students for critical citizenship through the process of reaching sound judgments based on evidence (Barton & Levstik, 2004, p. 202).
- *Historical empathy as perspective recognition*: the rational examination of the perspectives of people in the past. Unlike the everyday notion of "feeling with" others, historical empathy involves an understanding of why people in the past thought and acted as they did. Recognition of past perspectives entails various subcompetencies such as a sense of otherness, shared normalcy among human beings, historical contextualization, and differentiation of perspectives. Historical empathy prepares students for public deliberation in a pluralistic society in which people hold different opinions.
- *Empathy as caring*: the emotional connections and interests necessary to care *about* and *for* history. Empathy is not only a cognitive tool to understand the past but also an "emotional connection" making it possible for students to develop personal interests (care *about*) and the desire to help people (care *for*). This form of empathy seeks to promote activism so that students feel the need to respond to past injustices or sufferings and contemporary events based on what they have learned from the past.

These four tools are closely associated with second-order concepts. However, Barton and Levstik (2004) have not conceptualized them as procedural concepts of historical thinking scholarship but rather as "cultural tools" for contributing to civic life. As Barton and Levstik (2004) contend, history is not conceived as an academic discipline because "we do not believe history's contribution to participatory democracy depends on teaching students how historians as a professional community go about their investigations" (p. 187).

Implications for the U.S. Research

Studies influenced by this research stream are wide-ranging. Among other things, they have investigated the role of the sociocultural context on students' historical ideas in cultural settings, thus examining how identity and culture impact learners' own approaches to sources, narratives, and the significance of the past (Barton, 2001; Barton & McCully, 2005; Epstein, 1998; Lévesque, 2005; Levstik, 2000; Peck, 2010). Other studies have explored more specifically students' understanding of time, change, and agency (Barton, 1997; Brophy & VanSledright, 1997; Demers & Lefrançois, 2015; Yeager, Foster, Maley, Anderson, & Morris, 1998). Research also has been conducted on students' understanding and use of historical narratives for instructional and identity purposes (Barton, 1996; Levy, 2012; VanSledright & Brophy, 1992; Vass, 2004). Some researchers have studied the pedagogical content knowledge of prospective teachers and their classroom culture (Grant, 2003; Hartzler-Miller, 2001; van Hover & Yeager, 2003; van Hover, Hicks & Cotton, 2012).

Taken together, U.S. research developments in historical thinking have provided the scholarly community with a more robust knowledge base in the field. As Tim Keirn and Daisy Martin (2012) observe, "research on historical cognition and the scholarship of teaching and learning are the backbone of this movement" (p. 489). Recently, the field has questioned preoccupation in the US with high-stakes assessment (Smith & Breakstone, 2015). New Common Core State Standards and Advanced Placement curricula and assessments have given historical thinking a greater place in education (Reisman, 2015), but, as Gabriel Reich (2015) notes, such "standards" are traditionally conceived by states and bureaucrats in a particular institutional context "with different imperatives, mandates, and political considerations" (p. 221). Far from being driven by scholastic imperatives, this large-scale assessment movement in history education has political ramifications related to public anxiety over the transmission of culture and heritage to the next generation.

Conclusion

In this chapter, we have highlighted work related to historical thinking in England, Germany, Canada, and the US. Though increasingly influenced by work in other national contexts, each has been characterized by unique emphases, research findings, and educational applications. Scholarship in England, influenced by Bruner's notion of the structure of the disciplines and Hirst's concept of forms of

knowledge, has been deeply empirical, as well as pragmatic in that it has directly affected curriculum and student assessment. Researchers there have been interested in determining how students progress in their acquisition of various second-order concepts. This work has resulted in curriculum development intended to foster this acquisition as well as assessment strategies designed to monitor it. This disciplinary focus has been influential in Canada on the historical thinking framework. This work too has had a significant impact on curriculum and assessment, although more recently and not yet as consistently as has been the case in England. For example, little attention has been paid so far to measuring progression of concept acquisition among learners. Work in Germany has been more theoretical in nature and concerned primarily with historical consciousness. It has been challenging to apply this model to history curriculum and student assessment, but recent inroads have been made, notably in reference to certain competencies (e.g., narrative).

Finally, in the US two foci are apparent. The first, disciplinary literacy, has been commensurate with a growing body of research on students' reading and writing abilities. Although these studies highlight instructional features that can be tested on a larger scale, "the generalizability of these studies is often limited by the small sample, the lack of a control condition, and the absence of baseline measures of historical thinking" (Monte-Sano & Reisman, 2016, p. 283). Also problematic is the absence of a longitudinal understanding of the learning that takes place through the years of schooling. Indeed, research to date has not moved "far beyond the findings of the foundational and ambitious History 13–16 Project in the United Kingdom or the expert–novice studies of the 1990s to further define learning progressions, even on discrete components of historical thinking, literacy, or epistemology" (p. 290). We note that Dutch researchers have begun to examine progression in historical thinking over the past decade (see Chapter 6 in this volume). Equally interesting is the growing demand for research on digital literacy skills. The Stanford History Education Group (2016) has recently engaged in studying how U.S. students reason about historical and contemporary information they consume from the Internet and social media. Their initial findings suggest that "digital natives" are ill-prepared and poorly skilled at judging the credibility of online information.

The second focus, democratic citizenship education, has been conceptualized as cultural tools that contribute to citizens' ability to participate in a democratic society. This citizenship dimension also is apparent in the "ethical dimension" of the Canadian historical thinking model. As Seixas (2000) noted, "Disciplinary history provides students with standards for inquiry, investigation, and debate. History taught through this approach exemplifies the liberal, open society and should prepare students to participate more fully in one" (p. 34). It is also implicit in the German concept of historical consciousness, with its emphasis on using the past to articulate a coherent ethical vision for the future. This citizenship dimension, although present, is not as readily apparent in the work in England. As Lee (2014) has suggested with regard to the English work, we need to consider how much acquisition of new historical knowledge changes "students' ideas about appropriate responses to current diplomatic, political, economic, environmental and cultural problems" (p. 190). A central challenge for history as

citizenship education pertains to the contested nature of the "good" citizen. Many countries, including the US, still hold on to a traditional definition of citizenship grounded in national sovereignty and patriotism, whereas global or transnational notions of citizenship appear to be more established in parts of continental Europe and Canada where nationalism may be viewed as suspect. The recent "Brexit" response to the European Union may suggest quite a split among the British public over nation, sovereignty, and citizenship.

What is required now is more empirical work on historical thinking in order to address questions raised in this chapter. Greater attention to theoretical analysis of the nature and purposes of history education in schools is also necessary in order to provide a foundation that will enable a vigorous and coherent defense of a disciplinary approach to the subject. Finally, we must continue to support robust global cross-pollination of ideas through journals such as Australia's *Historical Encounters* and edited collections such as this volume and the recent *Palgrave Handbook of Research in Historical Culture and Education*.

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6

Historical Reasoning: Conceptualizations and Educational Applications

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Within the field of history education, historical reasoning is one of the constructs regularly used to define both goals of history education and the activities that students should engage in to learn history. Engaging students in historical reasoning is an important task in enhancing their understanding of historical events, situations, persons, and developments (van Boxtel & van Drie, 2013; van Drie & van Boxtel, 2008). For example, by analyzing causes and consequences we better understand historical events such as the granting of city rights by a count in the Middle Ages or opening of the checkpoints in the Berlin Wall by the East German authorities in November 1989. Reasoning about these events contributes to the development of historical understanding and the appropriation of knowledge that can be used to interpret new information about the past, both in and outside of school. Furthermore, it is argued that the ability to construct or evaluate historical reasoning is a valuable competency or skill that helps students to orientate in the present and to participate in society as a citizen (Barton & Levstik, 2004; VanSledright, 2010). The ability to reason historically enables students to deconstruct representations of the past that they encounter in daily life and in the media. It supports the analysis of current problems or changes in society and reflection on intended and unintended consequences of human action.

This chapter begins with conceptualizations of historical reasoning that can be found in research literature on history education. We discuss them using a framework that we developed to define types and components of historical reasoning and the factors that shape the quality of this reasoning. This framework conceives historical reasoning as an integrative and socially situated activity. We explore how historical reasoning relates both to historical argumentation and to historical thinking, two other central constructs in the research literature that partly overlap with the construct of historical reasoning. Next, we discuss empirical studies that shed light on how historical reasoning is shaped by students' understanding of historical metaconcepts, substantive knowledge, understanding

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of the nature of historical knowledge and knowing (epistemological beliefs), reading and writing abilities, and interest in history. It appears that there are many assumptions about these relationships, but empirical evidence remains scarce. Most research that we discuss uses cognitive theories of learning, but we also pay attention to the sociocultural perspective—how students' historical reasoning also is affected by the context of the classroom, the educational system, and the broader historical culture in which history education is embedded. This also means that our conceptualization of historical reasoning is culture-specific, because it is grounded in studies that are conducted in a Western context. Lastly, we discuss promising pedagogies to enhance students' historical reasoning in the classroom, focusing on insights from empirical studies.

Conceptualizations of Historical Reasoning

Reasoning is a subcategory of the broader concept of higher-order thinking, which comprises mental activities such as conceptualizing, evaluating, and decision making. These thinking activities largely overlap. Reasoning is a form of thinking or a set of thinking activities aimed at reaching justifiable conclusions (Holyoak & Morrison, 2012; Moshman, 2013). New information is derived from information that is provided or collected to draw a conclusion that must be supported with arguments. The debate about the extent to which the ability to reason is domain-specific is ongoing. On the one hand, some scholars emphasize that research has shown that when problems are ill-defined, which is often the case in the domain of history, generic reasoning heuristics and metacognitive understanding and skills play a role (Perkins & Salomon, 1989). Ill-defined or informal reasoning problems lack established problem-solving procedures and verifiable single solutions, and reasoning about such problems typically takes the form of argumentation (Weinstock, Neuman, & Glassner, 2006).

Supporting claims with evidence is an important component of reasoning in various domains. The domain-specific perspective emphasizes that the use of historical sources to reach conclusions about historical events and the evaluation of the usability and trustworthiness of historical sources require knowledge of how these activities are performed in the particular domain of history. In history, evidence is often incomplete, uncertain, inconsistent, context-specific, and mediated through other people (Kuhn, Weinstock, & Flaton, 1994). Furthermore, the information concerns time periods that differ from the current time period; thus, individuals must engage in historical contextualization.

The same holds for cause-and-consequence reasoning, which is an important type of reasoning in several domains. In the sciences, causal explanations are constructed through controlled experimentation. Potential causal relationships are tested through systematic variations in one variable at a time. Historians, however, explain events that already happened and mainly particular cases rather than classes of phenomena. Criteria that are used to assess the quality of historical explanations include coherence, complexity of the explanation, clarity of argumentation, and the extent to which the explanation draws on historical facts.

Assertions about causes and consequences need to be supported with examples, details, and quotations from or reference to historical sources. Thus, history has its own epistemic norms and practices making it an epistemic system (Goldman, 2011). The epistemic system of history, however, cannot be easily determined because epistemic norms and practices might differ among, for example, positivist, narrativist, and postmodern approaches to history or different subfields such as cultural or economic history. The discipline contains a variety of scholarly practices (Paul, 2011).

In the 1990s, historical reasoning became one of the core topics in cognitive-oriented empirical history education research. Researchers compared experts' and novices' reasoning and studied reasoning about history texts and documents and students' causal reasoning about historical events (see the volumes edited by Carretero & Voss, 1994; Leinhardt, Beck, & Stainton, 1994; Perfetti, Britt, & Georgi, 1995; Voss & Carretero, 1998). Several definitions of historical reasoning were used in these studies. For example, Perfetti et al. (1995) connected historical reasoning to the broader construct of historical literacy, which they defined as the ability to "reason about historical topics—to place them in more than one context, to question the source of a historical statement, to realize that more information is needed to reach a conclusion" (p. 5). Leinhardt, Stainton, Virji, and Odoroff (1994) defined historical reasoning as "the process by which central facts (about events and structures) and concepts (themes) are arranged to build an interpretative historical case" (p. 134), which requires analysis, synthesis, hypothesis generation, and interpretation. Other scholars focused on particular types of reasoning such as reasoning about historical documents, reasoning about causes and consequences, or analogical reasoning.

Based on these conceptualizations and our own research on students' reasoning during historical inquiry tasks, we developed a framework to conceptualize and analyze historical reasoning in the classroom (van Boxtel & van Drie, 2013; van Drie & van Boxtel, 2008). Our framework attempts to integrate the ideas of scholars who focus on particular types of reasoning or reasoning with particular second-order concepts of history, such as change or causation, and those of scholars who focus on historical argumentation and the use of historical evidence. Conceiving historical reasoning as an activity that is detectable in speech or writing, we discern three types and six components of historical reasoning (see Figure 6.1).

Historical reasoning attempts to reach justifiable conclusions about processes of continuity and change, causes and consequences, and/or differences and similarities between historical phenomena or periods. In reality, these types of reasoning often merge. Historical reasoning consists, on the one hand, of a coherent set of assertions about temporal and causal relationships that provides an answer to a particular historical question and utilizes substantive and metahistorical concepts and historical contextualization. On the other hand, it consists of the development of an argument to build a case for a particular interpretation or answer (Voss & Wiley, 2006). A disciplinary historical argument is developed through analysis and critical evaluation of available historical interpretations or of primary sources. It pays attention not only to arguments that support conclusions but also to opposing arguments and to other perspectives.

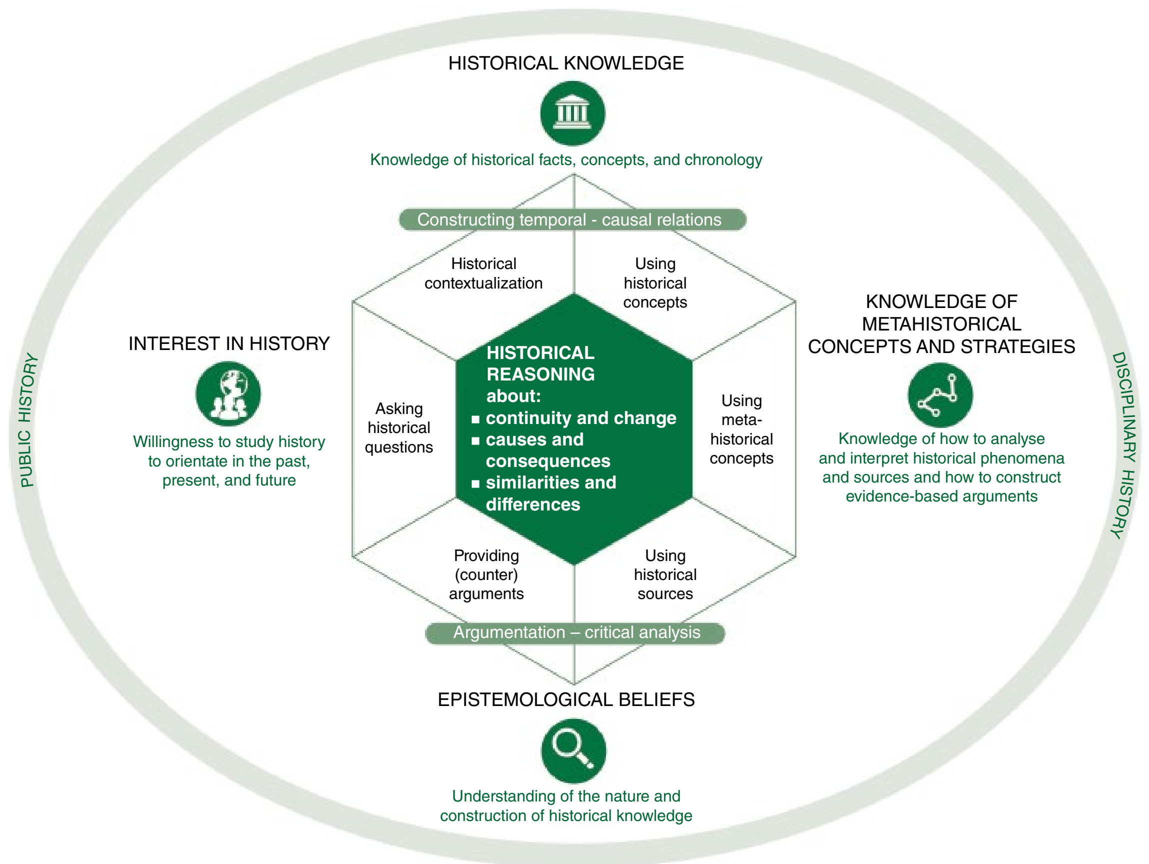

Figure 6.1 Types and components of historical reasoning and individual and sociocultural resources for historical reasoning.

Most research on historical reasoning focuses on working with historical sources. Rouet, Britt, Mason, and Perfetti (1996) made a distinction between reasoning *about* historical documents, which involves the evaluation of information from a document on the basis of document type, and reasoning *with* information from documents to solve a historical problem. Figure 6.1 shows that in our conceptualization of historical reasoning, reasoning about historical sources is subordinate to reasoning with information from these sources. We believe that reasoning about sources serves a function in the construction or evaluation of reasoning about processes of continuity and change, causes and consequences, and differences and similarities between phenomena and periods (types of reasoning located in the center of our figure). Studies on reasoning about historical sources often build on Wineburg's (1991) introduction of three reasoning heuristics relevant to the evaluation and use of historical sources: contextualizing, sourcing, and corroboration (e.g., Britt & Aglinskas, 2002; Leinhardt & McCarthy Young, 1996; Nokes, Dole, & Hacker, 2007; Reisman, 2012; Rouet, Favart, Britt, & Perfetti, 1997; Wineburg & Reisman, 2015). These studies generated interesting insights into the effects of disciplinary expertise on the use of these reasoning strategies, students' proficiency in these strategies, and effects of particular teaching approaches.

Of the three types of historical reasoning located in the center of Figure 6.1, causal historical reasoning has gained the most attention in history education research. Voss and Carretero's (1998) edited volume contained eight chapters about causal reasoning. For example, Lee, Dickinson, and Ashby's (1998) study asked students to answer the question of why the Romans were able to take over most of Britain. The study showed that some students seemed to think that a reason for action in itself explains the outcome and that students constructed different causal maps. Whereas some students focused on a single cause, others constructed a multicause model. Limón and Carretero (1998) explored how experts and novices addressed structural and personal factors. More recently, Lee and Shemilt (2009) presented a progression model for understanding historical causation in which they distinguished six stages. Students display a more sophisticated understanding of causation when they are aware of unintended consequences and are able to engage in "possibility thinking" (see also Chapman, 2016). Stoel, van Drie, and van Boxtel (2015) defined causal historical reasoning as the construction of a historical explanation through asking causal-oriented historical questions, constructing a historical context to explain individual actions and events, using substantive (first-order) and second-order historical concepts and strategies related to causality, and providing arguments and counterarguments based on historical evidence to support causal statements.

Not only historical explanations but also comparisons are produced through a process of reasoning. Teachers make many kinds of comparisons, for example, between persons, situations, ideas, developments, societies, or periods. Comparisons can help to identify recurring causal mechanisms but also to discover what is distinctive of a particular situation or development. Empirical research on comparative or analogical reasoning in the context of history education is scarce. McCarthy Young and Leinhardt (1998) analyzed how history teachers in 8th- and 11th-grade classrooms attempt to make unfamiliar items

and events understandable by means of processing them in terms of familiar items and events. Two historical events or structures can be directly compared (for example, pre-World War II conditions with pre-World War I conditions). In contextual analogies, historical events or structures are compared to events or structures outside the domain of history that students know about, in order to help evoke the impact or context (for example, the meaning of the "Iron Curtain"). When people compare past phenomena or past and present situations, they always risk overlooking microlevel differences, such as cultural, political, or economic variations (Mumford, 2015).

Although historical change is at the heart of the discipline of history, there are few empirical studies related to reasoning about change (Counsell, 2011). Not much is known about the way in which students analyze processes of change and come to conclusions about change—for example, how they characterize the nature of a particular change (e.g., revolutionary or not, progress or decline). Students in primary schools are able to describe changes over time based on visible physical factors such as transport or clothing (Barton & Levstik, 1996; de Groot-Reuvekamp, van Boxtel, Ros, & Harnett, 2014). Lee (2005) indicated that younger students often consider change to be an event instead of a process. Barton's (2008) study showed that children tend to think of historical change as a rational development toward the present and perceive this development as a process of progress. Students' understanding of change is likely to shape their analysis of particular instances. Studies on students' reasoning about processes of change, however, often focus on how students *explain* changes and, thus, focus on causal reasoning.

More recently, historical reasoning has been conceptualized and operationalized by researchers who focus on developing students' ability to write history (e.g., De La Paz, 2005; Monte-Sano, 2010; Monte-Sano & De La Paz, 2012). This research mainly focuses on aspects related to historical argumentation using information from multiple documents and less on how students reason about cause and consequence or processes of continuity and change. Monte-Sano and De La Paz (2012), for example, assessed the quality of historical reasoning in writing tasks on three aspects: substantiation (providing evidence and explanations in support of a claim), perspective recognition (presenting the texts as the authors' viewpoints, which can be evaluated), and contextualization (identifying and situating their argument in the appropriate time, place, and setting, thus linking related events).

Some of the activities in Figure 6.1 are also conceptualized as historical *thinking* activities. Identifying aspects of continuity and change, sourcing, constructing a historical context, and connecting claims to historical evidence are all examples of activities that have been labeled as historical thinking activities. Historical thinking and reasoning largely overlap, as they both aim at understanding the past. Furthermore, both types and forms of historical thinking and types and forms of historical reasoning are connected to the metaconcepts of the discipline such as historical causation, change, and evidence. Conceptualizations of historical thinking with a main focus on these metaconcepts do not offer a clear description of how historical thinking activities are interrelated. Historical reasoning, however, consists of a coherent set of historical thinking activities that

aim at reaching justifiable conclusions about historical phenomena according to the norms and practices of the discipline of history and using information about the past. Engaging in critical analysis and synthesis of information about the past to reach a conclusion and providing evidence to support these conclusions are important components of the historical reasoning process. For example, when trying to reach justifiable conclusions about the fall of the Roman empire, one can identify aspects of change and continuity in order to decide about significant causes and support claims with information from accounts of historians and primary sources. In the US, conceptualizations of historical reasoning place greater emphasis on reasoning about primary sources (Ercikan & Seixas, 2015; Seixas, 2016) and on argumentation. They pay less attention to what the argumentation is about (for example, change or causation) and to retrospective texts that were not produced contemporary to the time. European approaches—including those adopted in our own research—place greater emphasis on the organization of central facts and concepts to make claims about change, causality, or differences and similarities. This approach is also reflected in the idea of narrative competence found in the German history education literature. Narrative competence refers to students' ability to construct and deconstruct narratives (Körber & Meyer-Hamme, 2015; Schreiber et al., 2006), although most authors who work in this tradition do not use the term historical reasoning and give less attention to key concepts such as causation, change, and historical evidence.

Historical Cognition: Underlying Knowledge, Beliefs, and Interest

What are the resources that students utilize to engage in historical reasoning? Two approaches to answering this question are the cognitive and the sociocultural. Each has its own discursive tools. In history education, not only disciplinary history but also public history or collective memory plays an important role in shaping students' thinking and reasoning about the past. In the cognitive approach, emphasis has been placed on the role of mental resources such as students' content knowledge, understanding of metahistorical concepts, epistemological beliefs, reading and writing abilities, and interest.

First-Order Knowledge

Several research domains have shown that quality of reasoning is related to content knowledge (Hogan, 2002; Sadler & Zeidler, 2005). In history, first-order (or content) knowledge is a broad category that includes knowledge of historical events (e.g., fall of the Berlin wall), structures (e.g., feudal system), themes (e.g., tension between the State and the Church), concepts (e.g., modern imperialism), and chronology (Leinhardt, 1993). Historical facts, concepts, and chronology are used to construct temporal and causal relations. They are used to contextualize a historical event or situation to explain or compare it or to provide evidence for a particular interpretation (Monte-Sano & De La Paz, 2012; van Boxtel & van Drie 2012; van Drie, van Boxtel, & Braaksma, 2014). Students can only relate

historical concepts and facts in a meaningful way when these are understood. Rouet et al. (1997) found that when studying historical sources a richer knowledge base helps individuals select contextual elements at an appropriate level of generality. The same result was found by Wineburg (1998), who showed that knowledge about the general chronology, major figures and antecedents, and aftermath of the American Civil War enabled a historian who was not an expert on the Civil War to explain Abraham Lincoln's shifting views on slavery using a series of sources. Wineburg (1998) remarked that "the creation of context lies at the heart of historical expertise, forming the foundation upon which sound historical readings must rest" (p. 337). Colligatory concepts (which bind events within a period together) in particular can function as powerful tools for creating historical context when interpreting historical documents and images (van Boxtel & van Drie, 2012). In history, colligatory concepts, such as Renaissance or Industrial Revolution, are also used to identify processes of change, to explain and to make comparisons (McCullagh, 1978).

Despite these findings, in most conceptualizations of historical reasoning (as is the case in conceptualizations of historical thinking), the role of first-order knowledge is barely explicated. This is especially the case when historical thinking and reasoning are conceptualized as skills that should not be conflated with knowledge. The focus is mainly on how students think with their understanding of metahistorical concepts such as evidence or causation rather than on how they think with their first-order knowledge. In our own conceptualization (see Figure 6.1), we approach historical reasoning as an activity in which the application of first- and second-order knowledge and argumentation is integrated to reach justifiable conclusions about historical phenomena. In addition, scholars find it difficult to separate students' historical reasoning performance from their knowledge because the use of historical facts, concepts, and chronology is an integral part of the reasoning that is constructed. Instruments we developed to analyze quality of students' historical reasoning in written tasks and peer or whole-class discussions also reflect this integrative approach. They contain criteria about the use of first-order concepts relevant to the task. Important questions include how much and what type of first-order knowledge students need in combination with knowledge of second-order concepts to be able to evaluate or construct historical reasoning at a sufficient level.

Knowledge of Metahistorical Concepts and Strategies

Grounded in the notion of history as a distinctive form of inquiry and thought, second-order (metahistorical) concepts of history are higher-order concepts that help define the structure of the discipline. They shape historical questions and are used to organize substantive knowledge when making sense of historical sources and constructing historical interpretations. Lee, Dickinson, and Ashby (1998) identified *evidence*, *change*, *cause*, and *empathy* as second-order concepts. Later, several other second-order concepts were added. Limón (2002) added *time*, *space*, *fact*, *description*, and *narration*. Lévesque (2008) added *historical significance* and *progress and decline.* VanSledright (2010) also mentioned *historical context*, *human agency*, and *colligations*. Seixas and Morton (2012) added

historical perspectives and the *ethical dimension*. VanSledright and Limón (2006) made a distinction between second-order concepts (considered as a type of substantive knowledge) and strategic (procedural) knowledge, which concerns knowledge of how to investigate and interpret the past—for example, how to construct evidence-based arguments or interpretations within a historical context. The above lists suggest that there is no agreed-on clear definition of second-order concepts, but among a large number of scholars consensus on at least some characteristics is emerging.

Not all second-order concepts mentioned in the literature have been related to historical reasoning in equal measure. Researchers discuss historical reasoning mainly in relation to students' understanding of historical evidence, change, historical significance, agency, and causation. The underlying idea is that when students grasp these second-order concepts, they will demonstrate higher-level reasoning. For example, when students consider causes as reasons for actions they will not be inclined to pay attention to unintended consequences when reasoning about causes and consequences or will ignore causes at a structural level (e.g., Halldén, 1997). Rouet et al. (1997) found that when studying multiple historical documents about an event, history students who had more disciplinary expertise, and thus a more sophisticated understanding of metahistorical concepts, used more elaborate reasoning heuristics and more thoroughly examined possible interpretations than psychology students who lacked such understanding. In a recent experimental study on causal historical reasoning, Stoel, van Drie, and van Boxtel (2016) found a significant correlation between the quality of students' causal historical reasoning in an essay and students' knowledge of historical causation and strategies related to this second-order concept in the condition in which students worked on an inquiry task but not in the experimental condition in which this inquiry task was enriched with explicit teaching of second-order concepts and strategies. The students' understanding of metahistorical concepts and knowledge of strategies was measured separately from the quality of students' historical reasoning. Ultimately, the relationship between students' understanding of metahistorical concepts and quality of reasoning is difficult to infer from findings of empirical studies because the understanding of metahistorical concepts is mostly measured using reasoning tasks (e.g., asking students how a particular historical change or event can be explained).

Epistemological Beliefs About History

Students' epistemological beliefs may be an important factor that explains their limited argumentative reasoning ability (Kuhn et al., 1994). The idea that epistemological beliefs are at least partly domain specific has gained recognition (Buehl & Alexander, 2005). Epistemological beliefs concern ideas about the nature and construction of historical knowledge. What is true? How do we know? Outside the domain of history, evidence shows that more advanced epistemic cognition is positively related to more advanced thinking and reasoning (Hofer & Bendixen, 2012; Kuhn, 2000). Based on Kuhn's stage model (Kuhn et al., 1994) and Lee and Shemilt's (2009) progression model, Maggioni, Alexander, and VanSledright (2004) distinguished three types of epistemological stances (also Maggioni,

VanSledright, & Alexander, 2009). Students taking the *copier* stance regard claims about the past as either correct or wrong because they are copies of the past. Students adopting the *subjectivist* stance acknowledge that experts can disagree but lack an understanding or appreciation of the disciplinary criteria to judge different interpretations. This stance often results in the idea that history is merely a matter of opinion. Students operating in the more mature *criterialist* stance understand the constructed nature of history and the use of scientific criteria for evaluating the quality of interpretations, resulting in the idea that some interpretations can be more plausible than others.

Although the importance of epistemological beliefs is widely acknowledged, understanding of how students' epistemological beliefs affect their historical reasoning is limited. In the context of a history of science course, North (2005) compared the essays written by 10 students with an arts background and 10 students with a science background. She found that the arts students made the interpretations of different historians visible in their text, whereas the science students presented statements as factual. She explained these differences as a different understanding of knowledge either as mediated and contested or as representation of reality. Maggioni et al. (2004, 2009) developed a questionnaire that can be used to determine students' epistemological stance and investigate the relationship between students' historical reasoning ability and their epistemological beliefs about history (see also Stoel et al., 2015). Such instruments are important in that they enable research on how and the extent to which students' historical reasoning taps into their epistemological beliefs about history.

Reading and Writing Skills

Several scholars have argued that every discipline is a domain in which certain kinds of texts are read and written, and thus the development of expertise in the particular domain requires disciplinary literacy (O'Brien, Stewart, & Moje, 1995). It is, however, difficult to disentangle historical reasoning from reading and writing history because historical reasoning ability is largely expressed in the reading and writing of history. Reading skills are required to critically evaluate a historical reasoning presented in a text. The studies of Wineburg (1998) and Perfetti, Rouet, and Britt (1999) suggest that when reading historical documents students must construct a representation of the text, the historical events, the subtext (the author's potential biases and intentions), and an intertext model representing the relationships between different documents (agreeing with or contradicting). Wolfe and Goldman (2005) found that particular processes during the reading of two contradictory history texts about the Fall of Rome positively correlated with 11- to 13-year-old students' performance on a reasoning task in which they were asked to explain the historical event. The complexity of students' reasoning about the historical event was predicted by self-explanations during reading that used prior knowledge or previously processed text information and surface text connections.

Writing about history is a complex activity in which the student must combine content knowledge, historical reasoning ability, and knowledge of appropriate ways to present ideas (McCarthy Young & Leinhardt, 1998; Rouet, et al., 1996;

van Drie, Braaksma, & van Boxtel, 2015). Some studies provide insight into the relationship between historical reasoning and students' writing ability. Coffin (2004) indicated that writing a historical explanation requires the use of different kinds of conjunctions and nouns, such as *by*, *through*, *the result of*, *factors*, and the *main reason*, with which causal relations can be expressed. An experimental study conducted by De La Paz (2005) showed that eighth-grade students' writing ability significantly affected the length of the paper they wrote and the persuasive quality and historical accuracy scores of their paper but not the number of arguments they used in their text. A study by van Drie et al. (2015) found that initial writing ability had a significant effect on the general quality of the text that students wrote following an intervention focusing on historical reasoning and general text quality. Quality of historical reasoning in the text (e.g., the use of substantive and metahistorical concepts, contextualization, and the use of criteria for historical significance) did not correlate with initial (generic) writing ability. Inconsistent findings may be the result of a focus either on aspects of historical argumentation or on other components of historical reasoning.

Interest in History

For students, it is not always clear why they should engage in historical reasoning. History education may contribute to the development of interest in history, but in most cases educators need to address the question of how to make historical reasoning meaningful for students. Different types of interest exist. Individual interest in history is relatively stable, has developed over a longer period of time, and is often affected by experiences of situational interest (Renninger, Hidi, & Krapp, 2014). Topic interest is also a relatively stable form focused on a particular topic in a domain, such as World War II or ancient Rome. Students also may have an interest in the history of particular places and communities because they relate to their identity (Grever, Haydn, & Ribbens, 2008). Situational interest is a temporary state triggered at a particular moment in a particular environment, for example, by novel aspects, life themes, or topics that easily relate to everyday life experiences (Logtenberg, van Boxtel, & van Hout-Wolters, 2011). All types of interest emerge from the interaction between student characteristics and a specific situation or environment.

The relationships between students' interest and cognitive aspects of learning history have received little attention (de Leur, van Boxtel, & Wilschut, 2015; Del Favero, Boscolo, Vidotto, & Vicentini, 2007; Stoel et al., 2016). Students use more deep-level and higher-order learning strategies when they are interested in a domain or a particular topic (Alexander, 1998). Interest can be connected with emotions, such as indignation or astonishment, which can both hinder and facilitate reasoning. Based on research in educational psychology, we know that negative emotions can reduce available working memory resources and therefore have a negative effect on reasoning (Blanchette & Caparos, 2013; Oaksford, Morris, Grainger, & Williams, 1996). However, when an individual considers a question or topic relevant, this can improve his or her thinking and reasoning performance. Some studies show that a strong identification with a particular group can affect one's reasoning about and with historical evidence, for example,

by showing bias or selective sampling (Pettigrew, 1998, in Schwarz & Goldberg, 2013). Goldberg, Schwarz, and Porat (2008) found that when historical issues were more vital in collective memory, 12th-grade students' narratives were more prone to display ethnic identity bias. Savenije, van Boxtel, and Grever (2014) found examples of how moral judgements can obstruct historical explanation and reconstruction.

A Sociocultural Perspective: Disciplinary History and Collective Memory

In the sociocultural approach, scholars point to the situated and social aspects of thinking and reasoning (Mason, 2007). Students are enculturated into particular communities and discourse practices. Situated cognition and sociocultural approaches challenged the cognitivist and constructivist approaches to the study of learning and reasoning (e.g., Bereiter, 1994; Lave & Wenger, 1991). Historical reasoning in the classroom is also a situated and social activity (see Bain, 2006; Barton & McCully, 2005). Students reason in interaction with peers, the teacher, and the materials or curriculum used, such as historical textbooks or museum exhibitions. This interaction is shaped by the concepts and (variety of) methods that are developed within the discipline of history but also by representations of history that are part of public history and how the past is addressed publicly (e.g., media, museums, commemorations), particularly in students' social groups.

In the classroom, these types of historical practice come together. Historical reasoning is shaped by them, and the narratives that are produced by historians and in the public sphere can be the objects of historical reasoning. History teachers who integrate historical narratives and representations that are present in public history can make a unique contribution to students' understanding of history by helping them enter a *disciplinary* community of practice. They can do that by introducing students to disciplinary concepts and ways of thinking and reasoning, which are the product of a disciplinary community (Lave & Wenger, 1991). Language is the most important cultural tool that mediates the process of learning (Mercer & Littleton, 2007).

Historical narratives that students come across in and outside of history lessons mediate historical reasoning. Students reason with knowledge of historical facts, concepts, and chronology. This knowledge originates not only in the history classroom but also in historical narratives told at home or present in popular culture. Wineburg, Mosborg, Porat, and Duncan (2007) investigated what youngsters and their parents knew about the Vietnam War. They found that the narratives of the adolescents interviewed bore remarkable commonality, seeing Vietnam as a war waged without domestic support, occluding perspectives of domestic support from that time.

Wertsch (2004) indicated that a narrative template often underlies stories about the national past, for example, a "quest for freedom" or "triumph-over-alien-forces" template. In many countries, teachers and history textbooks give students romantic and essentialist narratives about the nation (Barton & Levstik, 2004; Lopez, Carretero, & Rodríguez-Moneo, 2014). Lopez et al. (2014) asked

students to explain the "reconquest" of Spain in the late Middle Ages. The students applied national adjectives to the territory and the people that inhabited the Iberian Peninsula and judged the Muslim conquests as illegitimate and the Christian Spanish conquests as legitimate. This nationalist master narrative hindered more complex and critical reasoning about the historical event. In addition, the scale (i.e., local, national, global) of the narratives and chronological frameworks presented to students was likely to affect their thinking and reasoning about historical events. Stradling (2001) has argued that a curriculum allowing a more global perspective might enhance more complex forms of historical reasoning in which students situate events in a broader context.

Barton (2001) and Barton and McCully (2005) compared the ideas and reasoning of students from the US and from Northern Ireland. Students from Northern Ireland were less likely to think that individuals are responsible for changes in history or that change is a process of progress. Students in the two countries used different cultural tools to reason about continuity and change and cause and consequence. Not only the amount and quality of knowledge of historical content but also the narratives in which this content is delivered or framed affect students' reasoning about historical phenomena.

Enhancing Historical Reasoning in the Classroom

Both factors that are emphasized from the cognitive perspective (e.g., historical knowledge, epistemological beliefs, interest) and factors highlighted from a sociocultural perspective (e.g., types of narratives that dominate public history or curriculum) might provide guidance for pedagogies that are effective in enhancing and improving students' historical reasoning. Teaching students to reason in history is a challenging job and may require a substantial amount of time in an already time-limited practice. This places high demands on the reasoning skills of the teacher, may be difficult and time consuming to assess, and requires good instructional materials and learning tasks (van Drie & van Boxtel, 2008). Although teaching historical reasoning indeed requires substantial effort, several studies inform us about pedagogies that trigger and support students' historical reasoning (van Boxtel & van Drie, 2013). There are several ways in which historical reasoning can be supported: explicit teaching, tasks designed to enhance historical reasoning, visual representations, and enhanced interaction. Our aim here is not to give a complete overview but, rather, to gather some insights on stimulating historical reasoning in the classroom.

Explicit Teaching to Support Historical Reasoning

Explicit teaching is the strategy best investigated in history educational research, particularly the notion of *cognitive apprenticeship* (Collins, Brown, & Newman, 1989) in which novices are "apprenticed" into expert practices. Teachers make strategies visible to students in an authentic activity (modeling). Next, students are supported to perform the task through guided practice (coaching) and independent practice (fading). Explicit teaching in history can have various aims;

however, most studies aim at improving individuals' disciplinary reasoning strategies (i.e., sourcing, corroboration, contextualization; Wineburg, 1991) when they are writing historical accounts based on historical sources that they have read (e.g., De La Paz, 2005; Nokes, et al., 2007; Reisman, 2012).

For example, De La Paz and Felton (2010) investigated the effectiveness of an integrated reading and writing intervention on 11th-grade students' writing of evidence-based arguments. The experimental group received combined instruction on historical reasoning and written argumentation. The instruction was based on a cognitive apprenticeship model, including teacher modeling followed by verbal scaffolding to help students use the strategies independently. The historical reasoning instruction focused on strategies for reconciling conflicting information from sources to build an understanding of complex historical events. Furthermore, students learned to plan and compose argumentative essays. The control group was exposed to the same materials and practice in writing historical essays but did not receive explicit instruction. The students in both groups wrote the same number of essays and received written feedback based on rubrics. Positive effects of the explicit instruction condition were found for essay length, overall quality (overall persuasiveness and historical accuracy), number of claims, number of rebuttals, and use of documents.

Another approach to explicit history teaching was reported by Stoel et al. (2015, 2016). Based on the Model of Domain Learning (Alexander, 2003), their studies looked at students' causal reasoning instead of reasoning with historical sources. Employing explicit teaching of strategies, second-order concepts to generate and verbalize causal explanations, and epistemological beliefs connected to causal reasoning in history, the teacher explicated relevant second-order concepts, modeled strategies, used an analogy, and discussed different ways to verbalize causal explanations. In the application phase, students practiced relevant strategies and concepts while working together on an inquiry task. In their experimental study (Stoel et al., 2016), this approach was compared with an implicit teaching approach that did not give explicit attention to causal reasoning strategies and epistemological beliefs. The results showed that students in the explicit teaching condition developed significantly more knowledge of causal reasoning strategies and second-order concepts and attributed a higher value to academic criteria for generating historical knowledge. No effects were found on the quality of students' historical causal reasoning in an essay.

The studies above show the strength of explicit instruction in teaching historical reasoning. Most have compared explicit teaching with a traditional approach to history teaching focusing mainly on content and not on disciplinary strategies. Only a few studies provide us with information on what *kind* of instructional strategies work best and why. For example, Nokes et al. (2007) compared four instructional interventions that differed in terms of type of text (traditional textbook vs. multiple texts) and type of instruction (content instruction vs. sourcing, corroboration, and contextualization heuristics) and found that the use of multiple texts resulted in better learning, regardless of the type of instruction (content or heuristics). In addition, van Drie et al. (2015) compared effects of generic writing instruction with domain-specific writing instruction on general text quality and historical reasoning. Both instructions were based on the idea of learning

from text models, which can be considered another form of explicit instruction. After the teacher provided brief instruction, students worked in groups to compare different text models and formulate criteria for strong texts. These criteria were next discussed with the teacher and the class. The researchers found a positive effect on quality of historical reasoning in written texts for the domain-specific writing instruction but no differences in general text quality.

Tasks that Trigger Historical Reasoning

One way to trigger students' interest in history is to use realistic or authentic tasks or problems (Newmann & Wehlage, 1993). Collins et al.'s (1989) cognitive apprenticeship model considers working with authentic tasks to be an important element. This raises the question of what can be considered authentic tasks in history.

From the perspective of the profession of the historian, document-based writing tasks are considered authentic in history education (Freedman, 2015). Document-based writing fits within the broader category of historical inquiry tasks. In inquiry tasks, students have the opportunity to construct their own knowledge and answer historical questions based on their analysis of a variety of sources, which can include historical documents, images, accounts of historians, history textbooks, or information on the internet or in media (Barton & Levstik, 2004; Saye & Brush, 2002; Seixas, 1993). Given that inquiry tasks are open-ended without a fixed answer, they are especially suited for eliciting historical reasoning. For example, Voss and Wiley (1997) found that writing an argumentative essay based on multiple sources is more powerful in enhancing learning and understanding in history than writing a history or a narrative or using just a textbook. The combination of multiple sources and argumentative writing elicits constructive and transforming activities—for example, integrating source material, examining and evaluating several factors, and organizing these factors into a reasonable argument.

The question or prompt is an important element in constructing an inquiry task because it influences the amount and kind of reasoning elicited. Van Drie, van Boxtel, and van der Linden (2006) concluded that an evaluative question is more powerful in eliciting historical reasoning than an explanatory question. In their experimental study, one group of 11th-grade students worked with the evaluative question and another group worked with an explanatory question about the same topic. Students worked in pairs in a computer-learning environment in which they could study historical sources and collaboratively write an essay. Students working with the evaluative question wrote better texts, and this prompt elicited increasingly elaborated historical reasoning in chat discussions. In addition, Monte-Sano and De La Paz (2012) compared four different writing prompts (situated, sourcing, document analysis, and causal) on three aspects of historical reasoning—substantiation (providing evidence and explanations in support of a claim), perspective recognition (presenting the texts as the authors' viewpoints), and contextualization (situating arguments in time, place, and setting)—on the origins of the Cold War given to 101 10th- and 11th-grade students. They concluded that prompts focusing on sourcing, document analysis, or causation were more likely to elicit students' attention to multiple perspectives

than prompts that asked students to imagine themselves as historical agents. The first three prompts all required students to consider the authors of the documents and their different viewpoints, which the researchers considered an important step in fostering students' historical reasoning.

These findings emphasize careful consideration of the question used in inquiry tasks. However, Freedman (2015) argues that students should formulate their own questions instead of working from predefined questions. To engage students in what he calls "critical historical reasoning" which recognizes that historians frame their investigations through the questions they pose, students should be asked to frame their own investigations. In this way, the task becomes more authentic in the sense of resembling the profession of the historian. In addition, other scholars argue that students should investigate their own questions because such questions are more relevant and meaningful to them (e.g., Barton & Levstik, 2004; Seixas, 1993). A study conducted by Logtenberg et al. (2011) showed that after students read an introductory text about a new topic, they were able to generate historical questions that could be used as a starting point for historical inquiry.

Although these kinds of document-based inquiry tasks have proven to be suitable tasks for enhancing students' historical reasoning, the question arises of whether these tasks also can be considered authentic from a student perspective. Are tasks that are closer to students' daily life and interest more authentic for them? As an example of a different authentic approach, van Drie, van Boxtel, and Stam (2013) described a task in which students were asked to write a letter to the secretary of a Dutch museum organizing an exhibition about the development of Dutch democracy. In their letters, students made a case for a historical person or event that they considered most significant to the development of Dutch democracy to be included in the exhibition. The task was thus embedded in a realistic setting, and the goal of writing and the audience were clear, which is considered important for writing (Rijlaarsdam et al., 2008). Furthermore, the question of historical significance in itself can be meaningful to students because they are asked to independently consider why people and events from the past are important and for what reasons. Although this study did not compare this task with another task, the analyses of the letters written and the whole-class discussion about the top 10 events and people showed that this task elicited students' reasoning in writing and especially in the whole-class discussion. This included reasoning about the impact of historical changes, consequences of actions, and the influence of particular persons. Moreover, interviews with the teachers and the students showed that they enjoyed working on this task.

Supporting Historical Reasoning With Visual Representations

Visual representations can be considered "tools for thinking" that help learners to express, explain, and discuss their ideas (Stahl, 2000). They can be useful tools for supporting students' historical reasoning. Examples of representations include concept maps, argumentative diagrams, matrices, causal maps, timelines, and drawings. Historical information is not represented in linear text but rather in a different graphical form. Cox (1999) considers learners' self-constructed representations (compared with ready-made representations) beneficial

for learning. Visual representations focus students' attention on central problems, relations, and structures in the task and immediately show which information is missing (thus stimulating elaboration). Furthermore, visual representation can function as a point of reference accessible to all learners and to which all students can easily refer. It can initiate the verbalization of knowledge and the negotiation of meaning that enables students to build on each other's contributions (Suthers & Hundhausen, 2003).

Different representational formats can support particular components of historical reasoning. A study by van Drie, van Boxtel, Jaspers, and Kanselaar (2005) revealed how the joint construction of a specific representational format influences students' historical reasoning. The researchers compared three different representational formats (list, argumentative diagram, matrix) within the same inquiry task asking, "Were the changes in the behavior of Dutch youths in the 1960s revolutionary?" Students worked in pairs in a computer-learning environment that enabled them to collaboratively write an essay and construct a representation. Communication took place via chat. The matrix enabled students to classify historical changes. The list enabled students to create a running list of supporting and opposing arguments. In the argumentative diagram, pro and contra arguments could be schematically ordered and related to each other using different colors. The results of analyses of the chat discussions revealed that the type of representation used influenced students' historical reasoning. For example, students working with the matrix talked significantly more about historical changes compared with the other students. Students working with the diagram reached greater balance between pro and contra arguments than students working only with the list. Thanks to the different colors, items with few counterarguments were directly visible.

The construction of representations can be used in various ways in the classroom—for instance, as a task in itself, as preparation for whole-class discussion, or as a prewriting strategy to select and order information from historical sources prior to essay writing. With respect to this latter use, one should bear in mind that converting the more graphical structure of the representation into linear text can be difficult (Coirier, Andriessen, & Chanquoy, 1999). In choosing a representational format, one must consider the kind of reasoning elicited, the amount of information represented, and the function of the tool with respect to learning goals. The construction of representation can be facilitated by computer technology (van Drie et al., 2005).

Supporting Historical Reasoning through Interaction

Through interaction, learners may internalize new knowledge and ways of reasoning that enable them to function at a more advanced level. Especially important are interactions in which learners are stimulated to think and reason with each other and explore various ideas (Mercer & Littleton, 2007; Nystrand, 1997). As a consequence, we suggest that students should receive ample opportunities to practice the language of history in reading, writing, and talking with each other and the teacher.

Whole-class discussion is worth special focus when considering historical reasoning. We recently argued for *dialogic* history teaching in which teaching occurs

both through and for disciplinary dialogue (van Boxtel & van Drie, 2017). Dialogic history teaching aims to engage students in dialogue about the construction and evaluation of representations of the past rather than presenting students with ready-made representations. In whole-class discussions, the main role of the teacher is to elicit and sustain an ongoing dialogue in which various perspectives are explored. Students' ideas are not evaluated against a norm but rather explored through evidence and arguments. Questions are used to ask for elaboration, challenge ideas, and invite other students to respond rather than evaluate. The teacher helps students learn to use the language of history and provides students with a model of reasoning. Through the analysis of interaction processes in whole-class discussions, we identified two ways in which teachers enriched students' historical reasoning (van Drie & van Boxtel, 2011). The first method included deepening historical reasoning by digging deeper into one specific component of historical reasoning—for example, asking students to discuss long-term and short-term causes of the French Revolution and relationships between these causes. The second method was broadening historical reasoning by adding a new component of historical reasoning to the discussion—for example, when contextualizing a historical source in time and asking students about the trustworthiness of the source. These kinds of whole-class discussions, in which students perform most of the reasoning, require students to have knowledge about the topic under discussion and thus are especially suited for debriefing after (collaboratively) performing a task (Havekes, 2015).

Several studies show the importance of whole-class discussion for students' historical reasoning. Leinhardt (2000), for example, described how a student progressed in historical writing over time and related this progress to the kind of instruction that he received, including discussions of history in classroom interaction. Through these discussions, he learned that there are multiple perspectives and positions in history and how to express his own perspective.

In sum, the studies discussed above highlight important characteristics of teaching students how to engage in historical reasoning in the classroom. Explicit teaching approaches have been shown to improve students' reasoning in reading and writing. Stimulating students' historical reasoning in whole-class discussions seems to be another important ingredient in enhancing students' reasoning. Furthermore, authentic tasks, particularly inquiry tasks in which students construct a historical interpretation based on several historical sources, seem powerful. The inquiry question used determines the kind of historical reasoning that is elicited and therefore should be chosen in light of the desired learning goals. These goals may aim at a particular type of reasoning, such as reasoning about historical significance or about causes and consequences. This also holds for choosing visual representations to support particular aspects of historical reasoning.

Discussion

This chapter conceptualizes historical reasoning as an integrative and socially situated activity. Historical reasoning aims at reaching justifiable conclusions about processes of continuity and change, causes and consequences, and differences

between and similarities in historical phenomena or periods. To develop such conclusions, students ask historical questions, contextualize and construct temporal and causal relations by using both substantive and metahistorical concepts, and build arguments using evidence from historical sources during the reasoning process. Thus far, most research has focused on students' use of historical sources as evidence in constructing a historical account or argumentation. Less attention has been paid to what students actually reason about—for example, how they reason about aspects of change and continuity or make comparisons.

When historical reasoning is considered as a competency or higher-order skill, the research literature does not give us many clues about which *sub*skills make up the ability to reason historically. Historical reasoning is a blend of subskills that are each complex, such as explaining, asking historical questions, historical contextualization, and the ability to investigate historical sources. Many of these historical reasoning skills are also conceptualized as historical thinking skills. Historical reasoning, however, is a coherent *set* of historical thinking activities which together lead to a conclusion and includes *argumentation processes*, such as the assessment of claims and arguments. More research is needed to unravel historical reasoning as a competency and how students develop it. Radinsky, Goldman, and Pellegrino (2015) make a similar remark about progression in historical thinking. Research must employ instruments that assess students' historical reasoning ability in a valid and reliable manner. These instruments should be fine-grained to grasp incremental development in students' historical reasoning ability.

Our conceptualization of historical reasoning also includes resources that determine the quality of reasoning: substantive knowledge, understanding of historical metaconcepts, understanding of the nature of historical knowledge and knowing (epistemological beliefs), interest and identity, and reading and writing ability. More research is needed on how these aspects influence historical reasoning. For example, what is the role of content knowledge in reasoning? What are the implications of historical facts and chronologies embedded in particular concepts and narratives characteristic for a specific historical culture? Furthermore, how do epistemological beliefs and understanding of metahistorical concepts influence students' reasoning? When students better understand historical change (e.g., that there are different types of change, that we can distinguish processes of change), are they better able to reason about processes of continuity and change when they study a new topic? The field also needs to know more about the interaction between different types of knowledge, interest, and epistemological beliefs. For example, knowledge of historical facts, concepts, and chronology might be requisite to the effective utilization of strategic knowledge (van Boxtel & van Drie, 2012). On the other hand, without strategic knowledge (e.g., how to explain a historical event), substantive knowledge may stay inert.

Teachers and textbooks often present history as given and finished (Bain, 2006). Students are often expected only to reproduce the fixed understandings. Only if they are stimulated to engage in historical reasoning themselves can students learn how to critically analyze the reasoning implicit in the historical narratives and representations produced in disciplinary and public history. Research has provided several important insights on how to stimulate historical reasoning in the classroom, but more is needed. Most teaching approaches aim

at reasoning about and with historical sources and causal reasoning; less is known about how to promote reasoning about historical changes or comparisons of historical events, developments, or persons. Moreover, explicit teaching approaches seem to be effective in fostering historical reasoning; however, other approaches (i.e., dialogic history teaching) have been less investigated. Systematic comparisons of the effect of different teaching approaches on learning outcomes and examination of whether some students would benefit more from one approach compared with other approaches would be interesting.

In addition, more research should be directed toward the competencies that history teachers need to teach historical reasoning in the classroom. How do teachers foster historical reasoning and what elements should be developed more thoroughly? To gain insight in teachers' current practices with regard to teaching historical reasoning, valid and reliable observation instruments are needed. There are some promising attempts to develop such instruments (Gestsdóttir, van Boxtel, & van Drie, 2015; Huijgen, van de Grift, van Boxtel, & Holthuis, 2017; van Hover, Hicks, & Cotton, 2012) that can be used as a starting point for teacher preparation.

This chapter has explored historical reasoning mainly from a cognitive perspective, while acknowledging that it is also a social and situated activity. The history classroom is a place where disciplinary and public history discourses come together and intermingle (Lévesque, 2016). Students can reason about change, causes, consequences, similarities, and differences in historical phenomena and periods, which also can help to understand the present and reflect on how people deal with history in the present (see Nordgren & Johansson, 2015). The research we discussed focuses on reasoning about past phenomena, whereas relating past, present, and future is considered a key aspect of historical consciousness (Rüsen, 2007). Scholars in the field of historical consciousness, however, do not clearly explicate what students actually do when connecting interpretations of the past, understanding of the present, and expectations for the future. In the context of history education, we operationalize historical consciousness as historical thinking and reasoning about past and present, shaped by interest in the past, substantive and metahistorical knowledge, and understanding of the nature of history, which are shaped by the social-cultural context.

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7

Historical Consciousness: Conceptualizations and Educational Applications

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Standing in Fort Elmina in Ghana, exploring a mining landscape in Cornwall, walking on Omaha beach in France: the awareness that on these sites people once lived, loved, worked, suffered, and died might evoke feelings of familiarity, proximity, and recognition but also of strangeness, distance, and alienation. Such sensations may generate a reflective approach to the past and even an understanding of its presentist engagement, indicating a nascent historical consciousness (Blaas, 1988). Shared within a community of—for instance—descendants of enslaved people, miners, and war victims, they can also result in a collective need "to give an account of the past" (Huizinga, 1929, p. 167). In this way historical consciousness seems to suppose a state of mind in a human being, referring to both an orientation in time (Rüsen, 1989, 2004; Seixas, 2006) and a sense of belonging to a distinct community (Müller-Karpe, 1982; Assmann, 1988).

The above statements provide just an impression of the large and still growing body of work on the evolving meaning of historical consciousness and its consequences for historical culture. Since the 1980s, the concept has become commonplace not only among philosophers of history but also among experts in history education and history didactics—developed in Germany and soon after in other European countries, to a lesser degree also in the United States, Canada, and Australia. In Europe, for instance, the *Youth and History* project involved a large comparative survey of historical consciousness and political attitudes among adolescents (Angvik & von Borries, 1997). Enhancing historical consciousness was even the explicit goal of new didactics curricula for history education in Sweden in the 1990s (Thorp, 2014) and later also in the Netherlands (Wilschut, 2002).

Around the same time, academic historians and opinion leaders started to use the concept to lament the lack of historical knowledge among young people in society (Grever & Stuurman, 2007; Leitner, 1994; Kölbl & Straub, 2001; Macintyre & Clark, 2003). In 2002 Peter Seixas founded the Centre for the Study of Historical

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Consciousness in Vancouver, Canada, which stimulated academic exchange between philosophers of history and experts in history education coming from continental Europe and the English-speaking world. The Centre also contributed to large-scale empirical research in Canada about the role history plays in contemporary society and how people engage with the past in daily life (Conrad et al., 2013).

Over the past decade, other concepts have come to the fore. It seems that while the use of *historical consciousness* as a term may be diminishing a little now, it still resonates with terms such as *historical cognition* and *historical thinking* (Seixas, 2017; Wineburg, 2001)—both chapters in their own right in this collection. Despite a diversity of interpretations of historical consciousness, researchers continue to be motivated by a scholarly desire to understand and explicate the ways people make sense of the past "now" and "then"—as a discipline and as a form of memory—and its importance in public and private life.

To what extent is the concept of historical consciousness relevant and useful for theoretical and empirical research on history teaching and education, and for teachers' practices in their history classes? We start to address this question by briefly historicizing the development of the concept of historical consciousness and some of its influential definitions. Then, we will further discuss these definitions in the context of other current concepts, particularly *historical culture* and *historical cognition*, the latter including our views also on *historical understanding*, *historical thinking*, and *historical literacy*. We are aware that these concepts have partly overlapping meanings and connotations, influenced as they are by different national traditions and language cultures. But, we hope to present some clarification amidst this conceptual labyrinth in order to support the formulation of a consistent framework of disciplinary competence. Finally, based on some examples of educational applications and classroom practices, we explain how the concept of historical consciousness can be elaborated in such a way that it might be useful for empirical educational research and for teachers' practices.

Historical Consciousness: A Historical Phenomenon

Whatever we want to say about historical consciousness, we cannot ignore the influence of German philosopher Hans-George Gadamer in developing the term, by applying concepts such as *horizon* and ideas about historical understanding and tradition. Gadamer (2006) argued that historical consciousness "is always filled with a variety of voices in which the echo of the past is heard. Only in the multifariousness of such voices does it exist: this continues the nature of the tradition in which we want to share and have a part" (p. 285).

But, tracing the history of the concept is a complex and almost impossible task and must therefore be executed with some reservations (Blaas, 1988). As John Lukacs (1985) stated, "historical consciousness (like the remembered past) is in itself a historical phenomenon and not only a psychological one (like memory)" (p. 15).

Probably inspired by a Hegelian concept of history, several historians, such as Joseph Vogt, assumed that without written sources historical consciousness is

hardly possible: "People who begin to write, transcend the state of naivety, and gain a higher form of historical consciousness. Only at this stage they are the subject of history as a science." (Vogt, 1949: p. 7 [our own translation from the original German]; see also Vogt, 1960, p. 334; van der Pot, 1999, p. 4). Others argue that this is an overestimation of written sources (Kirchner, 1951; Kölbl & Straub, 2001)—what some historians have labeled "scriptocentrism" (Diawara, 2002). Instead, such critics point out that performativity, embodiment, and material culture as nonwritten forms of communication, such as gestures, scars, rituals, commemorations, objects, statues, and buildings, can express historical consciousness in society as well (see also Nordgren, 2016; Winter, 2010).

Since the 1970s, historians, and particularly philosophers of history, have discussed to what extent and under which circumstances a modern form of historical consciousness emerged (Blaas, 1978, 1988; Koselleck, 1972, 1977, 1979/2000; Megill, 1978; Rüsen, 1994; Straub, 1998). Although in those discussions notions of progress and modernity are likely to pop up, including hierarchical assessments of historical consciousness, most researchers have tried to go beyond that hierarchy by emphasizing the unique character of the "premodern" phase with its own problematic and specific circumstances—attempts which other historians consider unsuccessful (Adriaansen, 2015). *Premodern* forms of historical consciousness refer to the self-evident influence of the past in the present (Koselleck, 1979/2000). The present was a continuation of the past; changes were only temporary disturbances of the natural state (Blaas, 1988). The assumption was that history contains a reservoir of exempla, that it was possible to translate experiences in suprahistorical rules of human behavior and action. In this way, history functioned for a long time as a "lesson we could learn from," in Cicero's well-known phrase (*historia vitae magistra*). Classical antiquity, in particular, provided important examples and lessons for politicians and scholars. Of course, depending on the knowledge of the specific and variable circumstances in the present, a selection of historical examples had to be made. However it may be, the instrumental approach to the past presupposed a relatively unchangeable human nature and a static society.

The importance of classical antiquity was still apparent at the end of the 16th century, although in a somewhat different way. Historians divided history into three parts—Ancient, Medieval, and Modern—and began to use the word "century" as an independent, numerical entity. They emphasized the overcoming of "dark centuries" between ca. 500 and 1500 by connecting their time to the glories of antiquity. Since then the very notion of "Middle Ages" and the adjective "medieval" have entered the vocabulary of historical thinking and maintained their canonical but depreciative meaning in the Western world (Murray, 2004; Raedts, 2011).

Modern forms of historical consciousness broke through when people perceived the present as fundamentally different from the past. In that case, living tradition no longer constitutes a prescriptive guide, but is corrected by critical reflections and analyses of traditional consciousness (Blaas, 1978). *Historia vitae magistra* no longer sufficed. But when and where did this process start? Probably the attitude toward the three time-modes "past, present, future" gradually shifted in Western Europe, at first in scholarly circles, then later also among the public

at large (Grever, 2001). Reinhart Koselleck (1972) considers the period ca. 1750–1850—the so-called *Sattelzeit*—as the crucial transition. Rudolf Wendorff (1980) explains that, despite earlier attempts, a modern historical consciousness of time emerged in Europe at the end of the 18th century based on the new notion of progress. Lukacs (1985) emphasizes the 17th century as a starting-point, as does Blaas (1988), but the latter positions modern historical consciousness with the *Querelle des Anciens et Modernes* [Quarrel of the Ancients and the Moderns], culminating in the so-called "war over Homer" in 1714–1716 (Megill, 1978, p. 35). Others, such as John Plumb (1971) or Siep Stuurman (2001), assume the starting point to be in the late 16th century (for an overview of various opinions see Rüsen, 1994, 1999; Jonker, 1996). Whereas terms such as "renewal" and "new" still had negative connotations in the 17th century (Raedts, 2011), in the 18th century a new perspective on the future turned up among several groups and classes in society—particularly regarding its malleability—which resulted in a reordering of history with a new semantics. Around 1750, words such as "change," "progress," and "future" in the modern sense circulated in society, expressing the temporal difference between past and present, between "space of experience" and "horizon of expectation" (Koselleck, 1979/2000). People experienced an acceleration of time (*Beschleunigung*) with a rapidly fading past.

Dramatic social changes in the last two centuries, such as political revolutions, socioeconomic processes of industrialization, the formation of mass society, the increase in mobility, secularization and political emancipation, and, last but not least, the traumatic events of the two world wars, have pushed the past even further away (Beyen, 2002; Grever, 2001). The intensity and speed of change in Western society have led to social disorientation and perceived ruptures in time dispersed throughout the entire world by way of European colonialism and postwar global capitalism. The sense of forever being denied access to a time in the past has invoked a nostalgic longing for a past world, a longing which has been transformed into a desire to know, study, and objectify the past (Ankersmit, 2001). Simultaneously, it has also been associated with a rejection of Western modes of time in certain political and insurgent movements, including Islamic fundamentalism (Ansary, 2009).

The historiographic and philosophical debate on the changing attitudes toward past, present, and future and time marking also influenced reflections on history education. At a conference in 1972, German social historians and experts in history education raised the issue of the gap between the theory and the practice of historical science and history education. Reinhart Koselleck, one of the speakers, provided a way to review academic historiography and the history curriculum in German universities and high schools with his idea of "historical time." He assumed that, just like academic historiography, the didactics of history was in need of theory. Perhaps in hindsight, terms such as the "dynamics of history" (*die Beweglichkeit der Geschichte*) and "multiperspectivity" (*Standortgebundenheit*) were proto-didactic concepts to reflect on a renewed postwar history curriculum (Koselleck, 1972, pp. 11–12, 20).

Two other discussions were—at least in the short term—more important to history education. The first pointed to a distinction between scientific and everyday historical consciousness. Scientific historical consciousness involves the

training of historical knowledge and skills, based on history classes in high schools, colleges, and universities. Everyday historical consciousness is a more vernacular way of dealing with the past, related to popular historical culture, not necessarily inferior to a trained consciousness (Jonker, 1996; Ribbens, 2002). A more or less similar distinction is "the interplay between scholarly study of history, state institutions and the commemorative practices" of other groups and organizations, the latter involving a more popular approach, not so much focused on historical facts and official practices, but rather on "shared attitudes, opinions and values" (Lutz, 2012, p. 37). The concepts used in this discussion refer to personal and collective memories, historical tourism, heritage, and superficial or "authentic" historical interest. Although the concepts hardly offer more clarification, their importance to history education is the acknowledgment that historical consciousness has several sources. School education, historical scholarship, public history, and popular uses of the past are equal shapers of historical consciousness (Ahonen, 2005). Thus, the study of "historical consciousness makes it possible to understand how people *use* the past," argues Stéphane Lévesque (2012; emphasis in the original). As a field of inquiry, it encompasses not only why history is important but also how, implicitly interrogating its place and function in society (Bruner, 2005; Polkinghorne, 2005; Wertsch, 2006): Is Western society's reliance on narrative universal? What is the meaning of history in people's lives? To what extent is our individual and collective identity shaped by history?

This brings us to reflection on the Western dominance of the concept. In 2002 Rüsen initiated in the first volume of his *Making Sense of History* series a debate on the issue of ethnocentrism and Eurocentrism. Because historical consciousness is closely connected to identity formation, Rüsen argues (2002), it always involves normative values and power. Universal and global claims of historical consciousness are hard to make. The authors in Rüsen's volume, coming from different continents, have not solved this problem but distanced themselves explicitly from a view of Western superiority (Burke, 2002). Other theorists wished "to enforce a sensitization for the history and culture of different continents and their plural character" (Diawara, 2002, p. 150). The relevance of this theoretical discussion was that it supported the didactic reflection on the implementation of multiperspectivity in history education in an increasingly global context with increasingly diverse classrooms (Grever, 2012).

Despite all the differences about the meaning of historical consciousness, the approach of Karl-Ernst Jeismann and Rüsen is a useful critical starting point for further reflection in the frame of history education (e.g., Clark, 2014; Ribbens, 2002; Thorp, 2014; Wilschut, 2012). Jeismann (1992) argues that historical consciousness means an awareness that human beings and all their created institutions and forms exist in *time*, that they have an origin and a future, that they do not represent anything that is stable, unchanging, and without preconditions. More than mere knowledge or pure historical interest, historical consciousness comprises the connection between past, present, and future prospects. According to Rüsen (2004), historical consciousness functions "as a specific orientational mode in actual life situations in the present" (pp. 66–67). People interpret current events from the past in order to act appropriately with a view to the future.

This orientation covers two spheres of life: externally, historical consciousness is manifested as an awareness of the impermanence of socially created conditions; internally, the temporal dimension of human subjectivity reveals itself, accompanied by the development of self-understanding and awareness which takes the form of a historical identity. Thus, the gradual awareness of a historical identity allows the self to be extended beyond the borders of birth and death because every human being is part of a whole that is greater than his or her personal life: a family, a church, a profession, a social movement, a national community, and so on. People identify with these groups and institutions, of which each has its specific history, resulting in the experience of transcendence of their own temporally limited lives. A famous and currently familiar example of this "temporal immortality" is national identity, the identification with the nation-state (Rüsen, 2004, p. 68).

Based on this overview—of course, inevitably limited—we analytically distinguish two current approaches to the concept of historical consciousness: one historiographical and the other educational. Both approaches involve insights into the philosophy of history. The historiographical approach refers to a recognition of the historicity of human beings and their knowledge in society (Blaas, 1988; Collingwood, 1994; Gadamer, 2006; Lukacs, 1985). It notes the impact of a growing awareness of the differences between past, present, and future on historiography, and results in the creation of historical time (Koselleck, 1972, pp. 13–14). What unifies the project of historical consciousness historiographically is the recognition of humanity's *historicity* (Ricoeur, 1981) or *historical condition* (Ricoeur, 2004, p. 284): "the fundamental and radical fact that we make history, that we are immersed in history, that we are historical beings" (Ricoeur, 1981, p. 274). Meanwhile, the educational approach focuses on how the concept can be elaborated and translated into concepts that can be used for empirical research and practices of history teaching. This second approach is a mixture of German philosophy (e.g., the work of Jeismann, Rüsen, and Pandel) and Anglo-American analytical and empirical research (Lee, Ashby, Wineburg, and Seixas). While Rüsen's typology of four types of historical consciousness (1989) have been perhaps the most influential for these reflections, Peter Seixas (2017) has further analyzed the traditions behind the concepts of historical consciousness and historical thinking as well as their empirical applications in an educational context.

Historical Consciousness in Relation to Other Concepts

The above philosophical and empirical research into historical consciousness provides an important survey of the field, as well as a catalogue of its evolution, impact, and theoretical contestation. Critically, it also acknowledges that history is a construction: "We all make histories endlessly," contends Australian historian Greg Dening (1996): "It is our human condition to make histories" (p. 35). The operative word here is *make*—it is worth noting how many practitioners theorize historical consciousness using this term. History does not simply happen, it is molded and compiled from the residues of what has been, according to Jerome Bruner (2005): "We impose coherence" on the past, and "make it into history"

(p. 37). "The past itself is not yet history," Rüsen (2012a) similarly insists—"it becomes history by the activity of the human mind" (p. 47).

To some extent historical consciousness is an intuitive state of mind. As Collingwood suggests (1994): "historical thinking is an original and fundamental activity of the human mind, or, as Descartes might have said … the idea of the past is an 'innate' idea" (p. 247). Rüsen (2012b) argues that we cohere what happened and interpret the past "for the sake of understanding the present and expecting the future" (p. 523; see also Lukacs, 1985; Rüsen, 1987, 2012a). This reading of historical consciousness draws heavily on research into memory studies, which has exploded in the past two decades (Hirsch, 2008; Tamm, 2013), to understand how personal and collective memories are related, how communities remember, mobilize, and perform the past, as well as the ways they forget it (Haebich, 2011; Halbwachs, 1992; Ricoeur, 2004; Seixas & Clark, 2004; Veracini, 2007; Wolfe, 2005).

Yet historical consciousness is also learned and adapted. It deals "with the learning and teaching of history" and how people learn to remember as social beings (Zerubavel, 2003) in addition to everyday "historical thinking." Its analysis "thus covers historical studies as well as the use and function of history in private and public life" (Rüsen, 1987, p. 284). In other words, historical consciousness includes not only humanity's emotional involvement with and interest in the past but also its capacity for critical historical reflection and engagement (in the scholarly, disciplinary sense; Ahonen, 2005, 2012; Megill, 1994; Rüsen, 2005). Rüsen's (1987) typology of historical consciousness—traditional, exemplary, critical, and genetic—is suggestive of the latent capacity of people to engage critically with the past and its narratives. We will come back to this issue later.

The growing scholarly interest in historical consciousness also raises important questions about its function, however. What is the relationship of historical consciousness to historical culture, to memory studies, or to historical thinking? What is distinctive about historical consciousness? Critically, can it be taught? Given the ongoing discussion and theorization over its definition and application, it is little wonder there is some confusion about historical consciousness in terms of how it relates to both quotidian historical discourses and the scholarly discipline.

Historical Culture and the Everyday

While historical consciousness was generally conceived as an awareness of the fundamentally historical character of human behavior, knowledge, institutions, events, and developments in society, including one's own position (Grever & van Boxtel, 2014; Koselleck, 2000; Rüsen, 1989; Seixas, 2004), the concept of historical culture (*Geschichtskultur*) became a central category within the German field of history didactics with its own developing methodology (Demantovsky, 2005; Rüsen, 1991; Schönemann, 2006;). Some Dutch historians (Grever, 2009; Ribbens, 2002, 2007) consider historical culture as a holistic metahistorical concept that opens the investigation of how people deal with the past, including its popular uses. Inspired by the work of German historians and philosophers, Grever and

Adriaansen (2017) have elaborated historical culture as a concept of three mutually dependent and interactive levels of analysis: (1) historical narratives and performances of the past; (2) material and immaterial mnemonic infrastructures; (3) conceptions of history. The term *historical* refers to events, thoughts, and ideas in the past. The term *culture* comprises shared attitudes, values, and perceptions of a group of people. Hence, *historical culture* encompasses not only articulated collective memory and historical imagination but also the ways in which relationships to the past are established in a dynamic interaction between human agency, tradition, performance of memory, historical representations, and their dissemination, as well as the presumptions about what constitutes history. In this way historical consciousness—as a reflective attitude about temporality and identity—belongs to the metahistorical approach of dealing with the past (the third level), nourished by academic and popular uses, material and immaterial, ceremonial and everyday.

Several large-scale projects completed in the past 25 years have explored these vernacular renditions of historical consciousness, particularly in the areas of memory studies and historical culture. Beginning in 1991 Magne Angvik and Bodo von Borries launched an ambitious comparative study into the historical consciousness and political attitudes of nearly 32,000 teenagers in 25 European countries as well as in Israel and Palestine (Angvik & von Borries, 1997). Smaller national-based studies in the US, Australia, and Canada followed and were able to address specific questions about historical production and consumption within distinct communities. In the US, around the same time that Angvik and von Borries' European Youth and History survey was being undertaken, historians Roy Rosenzweig and David Thelen (1998) were conducting a qualitative and quantitative survey of around 1,400 Americans that was motivated by a visible yet mysterious social paradox: Politicians railed over an apparent historical illiteracy among Americans, particularly schoolchildren, who seemed unfazed by their own historical ignorance, but meanwhile there was an explosion of historical production and consumption—what the authors termed "popular history making" (p. 3). Drawing heavily on that U.S. mixed-methods research, two subsequent national studies in Australia (Ashton & Hamilton, 2010) and Canada (Conrad et al., 2013) were completed using similar methodologies. Taken together, these projects fundamentally challenged professional understandings about who practices history and what constitutes historical knowledge. They revealed a distinct lack of community engagement with more formal national narratives, which people feel are too prescribed and disconnected from their everyday lives, and noted a simultaneous and apparently growing popular contemplation of history, which Ashton and Hamilton (2010) aptly term "past-mindedness" (p. 10).

Participants in all three studies often found it difficult to engage directly with the national history they learned at school, for example, confirming public anxiety about historical knowledge being in a state of perpetual "crisis" across all three countries (Clark, 2003, 2008; Morton, 2000; 2006; Nash, Crabtree, & Dunn, 1997; Sears & Hyslop-Margison, 2007; Symcox, 2002; Wineburg, 2001). Meanwhile, their own stories and experiences generated very strong connections with the past, revealing both the power of collective and intergenerational memory (Hirsch, 2008; Seixas, 2004) in these communities and a flourishing popular

historical culture. Respondents kept objects to pass on to their own children or grandchildren, participated in family reunions, compiled genealogies, and visited museums, heritage trails, and historical societies; they talked about the past with their friends and families; and they avidly consumed history—in the form of historical fiction, documentaries, video games, and popular history books (Ashton & Hamilton, 2010; Grever & van Boxtel, 2014; Rosenzweig & Thelen, 1998; Rosenzweig & Thelen, 2000). Further research—such as a comparative project on the historical views and perspectives of high school students in the Netherlands, England, and France (Grever & Ribbens, 2007; Grever, Pelzer, & Haydn, 2011) and a qualitative study of Australian and Canadian high school students (Clark, 2009)—extended those investigations into the educational domain, demonstrating that students also feel alienated from histories that focus on the simple transmission of national stories.

Taken together, such research noted an uneasiness—in the words of Ashton and Hamilton (2010), a "disjuncture between professional historical practice and 'people's history' or history in the 'everyday world'" (p. 8). One is official and knowledge-based—taught in schools, tested in surveys, and promoted by public institutions. The other is familial, experiential, and tactile and is deeply connected to people's own lives and communities. In turn, this growing body of work into historical consciousness also demonstrated the variety and scale of popular historical engagement that operated outside the boundaries of academic scholarship (Glassberg, 2001; Griffiths, 1996; Ribbens, 2007; Rüsen, 2005; Welzer, 2008).

For others, meanwhile, that same research revealed the limitations of everyday historical connections and confirmed academic historical understanding is indeed acquired. In a review of Rosenzweig and Thelen's *Presence of the Past*, historian Michael Kammen (2000) argued that, despite the pressure to democratize the discipline of history, everyday historical understandings are not equivalent to scholarly expertise: "Family and pastness are clearly not the same as history and should not be casually conflated with it" (p. 234). The U.K. historian John Tosh (2008) made a similar claim when he insisted that "thinking *about* history" and "thinking *with* history" are not the same thing (pp. 6–7; emphasis in the original). "Increasingly, the popular embrace of history is an emotional embrace," Australian historian Mark McKenna (2013) more recently added, "one that runs counter to the more critical understanding brought to the past by historians" (p. 580). Such comments reveal an inherent tension in the ways historical consciousness is understood: where the need to incorporate everyday historical culture is imperative but should not retreat from understanding the distinctive academic skills of historical cognition.

Historical Cognition: Spectrum of Historical Understanding, Thinking, and Literacy

Research into the disciplinary understanding of history has developed significantly in recent decades. Terms such as historical understanding, historical thinking, and historical literacy all refer to aspects of disciplinary cognition—the skills of historical practice—rather than simply recollection of, or interest in, the

past. Collingwood (1994) suggests that historical knowledge always involves a kind of self-awareness: "Historical thinking is an activity … which is a function of self-consciousness, a form of thought possible only to a mind which knows itself to be thinking in that way" (p. 289). But, the question is how to distinguish, with clarity and rigor, between historical consciousness based on the training of disciplinary historical skills in schools and that which is based on emotional and embodied historical connections, such as popular collective and individual remembering, reenactments, and other playful uses of the past (Grever, 2015; Levstik & Pappas, 1987). Further, as Seixas (1996) asks, "How might we go about theorizing the discipline-specific structures of historical understanding that enable us to do that?" (pp. 765–767).

Motivated by pedagogical aims, some history education researchers have increasingly worked to identify those structures of the discipline that form the basis of professional historical practice. U.K. scholars, such as Denis Shemilt (1980, 2000) and Peter Lee and Roslyn Ashby (2000), led research from the 1970s and 1980s into the teaching of historical concepts and progression of historical skills based on the groundbreaking Schools History Project. More recently, this has been complemented by Sam Wineburg's (2001) influential work demonstrating how the skills of disciplinary history are far from intuitive: Indeed, historical thinking is an "unnatural act" which requires careful comprehension and teaching. Canadian history educationists Peter Seixas and Tom Morton (2012) tell the same story: Historical thinking means the capacity to critically engage with complex and often competing historical interpretations, they contend, and to reconcile the values of the past with those in the present—as well as developing knowledge of historical content.

The term *historical literacy* has been similarly used by Australian history educators Tony Taylor and Carmel Young (2003) to describe this rich taxonomy of historical skills: "The public discussion about school history should focus more on understanding that history education is about the development of 'historical literacy' rather than a simplistic notion that history is about the recall of historical facts or, at best, an entertaining story" (p. 29). Knowledge of the past is an essential component of historical literacy, they maintain, but so too is the ability to understand multiple perspectives, develop research skills, and form arguments. This form of historical literacy goes much further than the push to develop national knowledge that many politicians and public commentators advocate for school history, and it is strongly represented in the professional discussion of the subject.

Defining the concepts and skills of historical understanding is a complicated and continuously evolving process. (As we have already indicated, there is considerable overlap and confusion between the seemingly synonymous terminology of historical thinking, understanding, and literacy.) Yet, the move toward a consistent framework of disciplinary competence is essential not only in the process of developing historical cognition but also in the creation of a common pedagogical language of history teaching itself (Roberts, 2013; Taylor & Young, 2003). The question remains, however, as to the impact of historical cognition on historical consciousness: Namely, what are the possibilities for educational applications of historical consciousness?

Historical Consciousness and Education

In the 1970s, Dieter Boßman asked approximately 3,000 German school students to write an essay on the topic “What I have heard of Adolf Hitler.” The responses shocked historians, displaying a lack of historical knowledge and revealing students’ historical comprehension of Nazism and World War II to be largely based on family stories and mass media accounts. This research questioned the efficacy of history education. The “Boßman shock,” as it came to be known, prompted politicians, history educators, and public commentators to wonder how a generation could have become historically *illiterate*. Were schools and teachers to blame? Were parents? The research revealed a “glaring discrepancy between what is taught in history class and what is learned” that “challenged the idea of a direct transfer of historical knowledge” (Meseth & Proske, 2010, p. 204).

Yet, the sense that there should be a direct transfer of knowledge from schools to students was nevertheless a founding assumption of history teaching, which persists to this day. Mirroring that shift toward a modern historical consciousness described earlier in this chapter, history education took on increasingly modern sensibilities by the mid-19th century. The subject began to be widely taught as a discrete discipline in Europe and elsewhere, and entered school curricula with very specific purposes, influenced by the pact between the professionalization of history and nation-state building, including moral and civic education, truth claims, and national belonging (Grever, 2009; Lukacs, 1985; Wilschut, 2010). Since then, the motives for teaching history and its delivery in the classroom have continued to evolve.

The subject has been framed by ongoing concerns of national knowledge, nostalgia, and educational relevance, as well as the often-competing demands of social cohesion and critical thinking. Significant methodological and pedagogical shifts in the discipline itself, particularly in the second half of the 20th century, saw the discipline challenged by integrated approaches, such as “social studies” especially in North America. Changes in the discipline were further prompted by ideological turns of feminism, postmodernism, and postcolonialism (Boucher, 2013; Wilschut, 2010). It is only relatively recently that the efficacy of history education in the development of students’ historical consciousness has come to be studied in detail. The influence of historical culture—its dominant narratives and mnemonic infrastructures—in the construction of students’ historical consciousness is critical to understand. As Wineburg, Mosburg, Porat, and Duncan (2007) contend, “the history young people glean from this ‘cultural curriculum’ may be far more powerful in shaping their ideas about the past than the mountains of textbooks that continue to occupy historians’ and history educators’ attention” (p. 69).

Clearly schools are complex sites of historical consciousness, where public expectations, memory practices, personal narratives, and the historical discipline (none of them free from moral or political values) come together. As Ahonen (2005) contends, people’s relationship to the past “is not only a matter of formal education but a broad social phenomenon” (p. 698). But, in what ratio? In other words, is historical consciousness something that is brought to the classroom by students, or an educational outcome, or both?

Contested Memory and the Classroom

Children are by "no means 'blank slates' when it comes to ideas and beliefs about the past"—"Historical consciousness does not emanate like neat concentric circles from the individual to the family to the nation and to the world" (Wineburg, 2000, p. 310). Research by Keith Barton and Alan McCully (2010, 2012) into the historical understandings of secondary students in Northern Ireland confirms the diversity of experiences that make up historical consciousness in the classroom. The historical interests and understandings of the students they interviewed were influenced and shaped by the sectarian narratives of their families and communities, but many had also "been exposed to the historical stories of the other side" (Barton & McCully, 2010, p. 157). The young people in their study

> had learned about the past in a variety of formal and informal settings, and although settings outside school sometimes conveyed politicized stories of Northern Ireland's past, other times, they exposed students to more general historical topics and led to a variety of interests that extended well beyond sectarian narratives. (pp. 157–158)

Comparative research into the historical views of Dutch, English, and French high school students (Grever & Ribbens, 2007; Grever et al., 2011) noted similar complexity in the historical values students bring to the classroom and expect from it. Their own cultural backgrounds, religious beliefs, and sense of national belonging converged alongside national, public, and pedagogical expectations in each of the three countries. Teachers, too, bring their own historical backgrounds and understandings into their history lessons (Klein, 2010). In his research into the historical consciousness of Québécois history teachers, Paul Zanazanian (2012) revealed how teachers' historical consciousness significantly determined their interpretation and teaching of English and French narratives of Canadian history in class. It would be hard to find any blank slates in the classroom, it seems. Rather, as Lévesque, Létourneau, and Gani (2013) suggest, the classroom is more a site of collision and intersection than a pedagogical control sample. Barton and McCully (2010, p. 173) agree that

> societal goals, whether implicit or explicit, influence the curriculum of any school subject…. Subjects do not simply mirror academic disciplines, but represent content deemed suitable for educational purposes, and the selection of content is inevitably influenced by political struggles, historical traditions, and the personal and social values of teachers, parents, and even students themselves. (p. 173)

What is more, convergence in the history classroom extends beyond contested collective memories to historical method itself. Significant research has been devoted to debates over history teaching that have been positioned as part of a wider set of "culture wars" or "history wars" (Clark, 2008; Macintyre & Clark, 2003; Nash, Crabtree, & Dunn, 1997; Phillips, 1998). These clashes over the past have played out around the world, embroiling museum exhibits, public

commemorations, and history textbooks in divisive and partisan contests over national memory, political values, and historical perspective. Yet, debates over the subject also hinge on competing values of school history. Is the purpose of a historical education to promote social cohesion and national values—or does the discipline's promise of fostering critical engagement with the past and the skills of historical thinking offer more social value? Can history's worth be measured in terms of national or historical literacy? Frequently, community assumptions about the purpose of history teaching rub uneasily against the professional understandings and aims of history teachers and academic historians (Barton & McCully, 2012; Clark, 2007). "The intellectual functions of history as a scholarly discipline are easily sacrificed to ideological and moral goals" (Stuurman & Grever, 2007, p. 2). Extant teacher, student, and community expectations shape the collective historical consciousness of the classroom; in turn, the classroom also has the capacity to shape the historical consciousness of those present.

Educational Applications of Historical Consciousness

If there is a need to acknowledge the multiple shapers of historical consciousness (pedagogical, cultural, and scholarly), as Ahonen (2005) insists, then the potential of history education to foster historical consciousness in various forms (oral, written, audio-visual, performative) must be properly examined. As comparative and national surveys into historical consciousness have revealed, there is a broad spectrum of historical engagement, from popular consumption of the past, to inherited community or familial links, to critical awareness of history's subjectivity. Yet several questions remain: To what extent is historical consciousness acquired in a uniquely educational context—and if it is, which aspects? What are the differences between formal education (schools) and informal education (e.g., museums, heritage sites)? We also might ask whether that spectrum implies an inherent progression. Can historical consciousness be measured and assessed in a pedagogical setting, and how does that overlap with pedagogical development in history?

It is important to remember that much of the extant research into the educational dimensions of historical consciousness is still at a theoretical, rather than empirical, stage. Grever and van Boxtel (2014) find Pandel's (1987) forms of historical consciousness (see also Kölble & Konrad, 2015; Labischovà, 2012) workable and useful for researching heritage and history education: *temporality* (students' awareness of past, present, future; orientation in time; skills to apply concepts of time and periods); *reality* (distinction between fact and fiction; students refer to evidence); *historicity* (students understand that human behavior is part of changing traditions which are historically specific and time-bound). In his recent consideration of historical consciousness and didactics, Andreas Körber examines the impact of competency-based teaching on the German history education. That curricular shift forced teachers and educators to examine the pedagogical dimensions of historical consciousness—to see historical consciousness not simply as "a state of mind, but a set of capabilities" (Körber, 2015, p. 19). History "can (and must) also be understood as the set of capabilities,

dispositions and skills necessary to undertake the required operations," Körber (2015) argues: "Historical consciousness then is a competence—the competence to think historically" (p. 19).

As for whether there can be progression in historical consciousness, Körber, as part of the collaborative HiTCH (Historical Thinking–Competencies in History) project, developed the "FUER-model" as a framework for assessment and attainment in historical consciousness. In devising this model, the group identified four competencies of historical consciousness: (1) competence in questioning, or inquiry; (2) methodological competence; (3) orientational competence (in relation to time); and (4) disciplinary competence (in using the concepts of historical practice) (Körber & Meyer-Hamme, 2015). Furthermore, each competence contains three levels of ability—basic, intermediate, and advanced—and in so doing "yields some new opportunities to formulate educational goals (and also standards)" (Körber, 2015, p. 42). Models such as these reveal the pedagogical possibilities for history education, argue Carlos Kölbl and Lisa Konrad (2015): they "help to clarify what is meant by the term historical consciousness" and "help in assessing historical consciousness in a more transparent and a more methodologically consistent way" (p. 26).

Rüsen (2012a, 2012b) also claims with his schematization of historical consciousness a certain ontogeny, a sequence of increasingly critical historical understanding. His four categories can be read as points on the spectrum of historical consciousness alluded to above: (1) *traditional* history recognizes the continuity of tradition—historical inheritance becomes a sort of prescription; (2) *exemplary* history uses the past to instruct contemporary action and belief; (3) *critical* history deconstructs any necessary continuity of tradition; and (4) *genetic* history historicizes difference across time (see also Ahonen, 2005). Having said that, none of these categories is mutually exclusive (Rüsen, 2004), and Rüsen emphasizes that his model should be interpreted as a sketch of different models of historical consciousness, rather than as a prescriptive hierarchy. To be sure, Rüsen is wary of hierarchy, and for obvious reasons: It has profound implications for the vernacular and multicultural history-making that researchers continue to study around the world:

> As long as we fail to acknowledge this intrinsic connection between the most sophisticated historical theory and the procedures of historical memory most deeply embedded in the culture and the everyday lives of people, we will remain caught in an ideology of linear progress, which considers cultural forms of memory simply as interesting objects of study, rather than recognizing them as examples of "how to make sense of history." (Rüsen, 2005, p. viii)

A hierarchy of historical consciousness elevates some forms of historical engagement and connection over others, rather than exploring how they relate to each other.

Lee (2004) notes that if Rüsen's matrix of historical consciousness can be said to represent stages, "it is not in the strong sense in which one stage succeeds and displaces another" (p. 5). Unlike the Piagetian stages of development upon which

history education programs such as the Schools History Project have been based, historical consciousness is not a learning approach but a theory for understanding the ways people turn to the past to understand their societies and themselves. "We are not being offered a ladder-like progression in which we move from one stage to the next, leaving the first behind," Lee (2004) insists: Rüsen "does not offer a model of the development of students' ideas about the nature of history as a discipline" (p. 33). Nevertheless, Rüsen and others are unambivalent about the potential of historical consciousness to develop over time. They see history education—be it in the classroom, in a museum, or on a heritage trail—as a means to facilitate its development (Kölbl & Konrad, 2015; Körber & Meyer-Hamme, 2015; Rüsen, 2004). As Sirkka Ahonen (2005) elaborates, while Rüsen's "types of historical consciousness are partly overlapping" it is nevertheless clear that "from the logic of their continuum certain educational guidelines can be deducted" (p. 699).

Others read that relationship even more concordantly. Catherine Duquette's (2015) research reveals a strong correlation between the development of historical consciousness and students' capacity for historical thinking. While historical consciousness is not in itself a form of critical thinking, she acknowledges, it can be a critical agent in the process of its development. Sensing a vital overlap between historical consciousness and historical thinking, Duquette argues that there is a compelling relationship between the development of a reflective historical consciousness and the ability to think historically. She maps a clear progression of historical consciousness with discrete stages of development that has important considerations for teaching history and historical thinking, such as providing a platform to foster critical thinking in students.

Lee (2004) also suggests the possibility of a viable, assessable framework for historical consciousness in a school context. He provides a list of seven historical consciousness criteria to determine students' capacity to historicize and understand their own relationship to the past, such as *field* (the ability to incorporate wider areas and longer time spans) and *coherence* (the ability to make internal connections, including explanatory ones, within strands). "The expectation would be that there would be progression in these areas as students moved through school," Lee (2004) contends (p. 13). Meanwhile, in countries such as Sweden and Germany the development of historical consciousness is already a stated curriculum goal (Seixas, 2017).

This educational reading of historical consciousness has significant implications—both in school and in educational settings outside it, such as museums and heritage sites (Grever, De Bruijn, & van Boxtel, 2012; Grever & van Boxtel, 2014). For a start, it makes a link between historical thinking and an active historical consciousness: Students who struggle to see themselves in time, to comprehend their own lives as historical actors, will struggle to develop the skills of historical thinking. As Julie Edwards (2005) maintains, it is imperative for teachers "to make connections to the students' lives so that they can see the relevance of history to them" (p. 31). This pedagogical reading builds on the understanding that fostering students' historical consciousness will facilitate historical instruction: "Every process of historical learning has to start with the situation of the pupils and students," Rüsen (2012b) contends—"What experiences of their everyday life have to be addressed and picked up in order to bring about the

competences of historical thinking they need for their future lives?" (p. 528). There is a distinct potential here for historical consciousness in the classroom to aid both students' engagement in the subject and their own capacity to think historically (Duquette, 2015).

Yet, that does not mean historical consciousness has an inherently progressive value either. For "active engagement" with the past also can be decidedly *un*critical, as several international scholars rightly insist (Barton & McCully, 2010, 2012; Clark, 2008; 2016). Historical consciousness can be used to gauge historical thinking, but can it, in and of itself, be assessed as wright or wrong? Anecdotal reports of migrant children jeering and whistling as Holocaust history is being taught in Dutch schools (Grever, 2015) demonstrates the problematic potential of historical consciousness in the classroom. As Wineburg (2000) reminds us, "lessons learned at home contravene those learned at school.... To make historical sense, we must navigate the shoals of the competing narratives that vie for our allegiance" (pp. 310–311). Such examples nevertheless confirm that historical connectedness is integral to any teachable historical moment.

Concluding Thoughts and Future Directions

Despite an ever-increasing body of scholarship on historical consciousness, there remain many questions to be answered regarding its implications for history education. As we have covered in this chapter, most research to date has focused on theorizing and, increasingly, mapping historical consciousness—including its relationship to other terms such as historical thinking and historical reasoning. However, the classroom remains a complex site for its delineation, where family, cultural, and national narratives collide with social and professional expectations of historical knowledge and understanding.

Additionally, as Seixas (2017) asks with good reason, how useful a concept is historical consciousness to describe non-Western modes of historical production and consumption? To what extent is there space in the classrooms of settler-colonial societies, such as Australia, the US, and Canada, or schools in Asia, the Middle East, and Africa, for students to think about historical consciousness in more culturally specific terms? Can we even think outside our current scholarly lexicon—very much influenced by Western academic discourses—to compare modes of historical connection, memory, and practice between cultures? There is still a need for research that explores the meaning and applicability of historical consciousness to increasingly diverse classrooms and on a global scale.

Nevertheless, researching historical consciousness has a critically defining and influential role on history education—both as a philosophically inspired claim on students' connections to past, present, and future and, increasingly, as a possible empirical model for researching the teaching of history and for practical applications for teaching historical thinking in the classroom. One thing is sure—as Ahonen (2005) and Seixas (2004, 2006) correctly warn—fostering historical consciousness does not mean simply teaching more history but developing targeted, thoughtful pedagogies that engage and challenge students. "More history education does not simply mean more history lessons" (Ahonen, 2005, p. 700).

Taking all the above reflections into account, we consider historical consciousness as a *temporary* state of mind—related to the levels of temporality, reality, and historicity—of a human being who is always involved in transforming (sometimes overlapping) mnemonic communities. Hence, this state of mind changes in the course of time due to aging (phase in lifecycle), societal events or processes, access to media and other public renditions, and the possible training in schools by means of historical thinking and reasoning. Indeed, historical consciousness can be expressed and enhanced by a set of capabilities (Körber, 2015). What makes the study of historical consciousness at once fascinating and complex is that, in contrast to historical thinking and reasoning, historical consciousness involves much more than verbally expressed and cognitive dealings with the past. It also means the acknowledgment of its embodied expressions, how people experience, use, and perform the past (Lévesque, 2012; Nordgren, 2016). Clearly, more empirical work on historical consciousness is required in order to explore some of the questions raised in this chapter, which will add greater context and understanding (both within and outside the classroom) to its already significant theoretical contemplation.

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8

Historical Empathy: Perspectives and Responding to the Past

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We begin our exploration of historical empathy by imagining ourselves as pupils in a British history classroom of the 1960s. History courses at the time were largely taught through memorization and recitation of important events, names, dates, facts, and British accomplishments, leading typical students to loathe historical study and seek escape at the earliest possible age (Nash, Crabtree, & Dunn, 2000). History teaching had fallen so far out of favor that its place in the curriculum was actually tenuous. The precarious position of the subject led to the Schools Council History 13–16 Project of 1972 (SHP), which was based on three overarching goals: (1) shift focus toward the skills and attitudes of historians; (2) look beyond an Anglocentric approach to history; and (3) demonstrate history's contributions to a well-rounded individual (Boddington, 1984). These goals were the basis for a curriculum philosophy focused on epistemological knowledge in history, logical reasoning skills, and meeting the needs of adolescent students (Shemilt, 1983). The new history would emphasize "know how" over "know that" (Rogers, 1987, p. 4) and require students to engage with concepts such as causation, interpretation, and historical imagination to create explanatory or argumentative narratives (Nash, Crabtree, & Dunn, 2000).

The newly created "enquiry in depth" and "topic development" courses explicitly expected students to engage in identification with historical figures. Educators believed that students who engaged in identification and empathy would be more humanely educated (Nash, Crabtree, & Dunn, 2000), which would help satisfy the third goal of the SHP. Interestingly, the word "empathy" was not actually present in this national curriculum; the label was adopted later because other terms were problematic and the definition of empathy was malleable (Lee & Ashby, 2001). However, the malleable nature of empathy also presented conservative critics with a "soft target and therefore, for polemical purposes, a well-chosen target" (Lee & Shemilt, 2011, p. 39). Historical empathy became immediately controversial in Britain and its acceptance was anything but immediate. We take

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up this controversy in a later discussion of critiques, but it is important to note here that empathy was likely more prominent politically than it was pedagogically at that point. Portal (1987) pointed out that empathy was "one among half a dozen or so historical skills to which approximately equal weight is accorded.... empathy as 'odd one out' among skills of an entirely predictable kind may find itself in the position of an optional extra" (p. 94). It was within this context that scholars began to define and explore historical empathy in greater detail.

In this chapter we chronicle evolving conceptualizations of, rationales for, and critiques of historical empathy put forward over the past three decades. We then provide an overview of research on the types of instructional exercises that promote historical empathy in the history classroom. Finally, we unpack issues surrounding measurement of historical empathy and chart a potential future course for empathy—and research on this construct—in the history classroom.

Conceptualizing Historical Empathy

Is historical empathy an achievement or a process? This question has generated considerable debate. Ashby and Lee (1987) described historical empathy as the former, pointing to historical empathy as a "shorthand term for a cluster of related notions" which seeks to achieve a successful reconstruction of "other people's beliefs, values, goals, and attendant feelings" (pp. 62–63). Reconstruction was predicated upon an understanding of the motives and actions of historical figures. This conception aligned with the attention that causation was receiving from historians such as Ringer (1989), who described the linkage between a historical figure's "pro-attitude" and associated beliefs in order to make rational connections to that figure's attendant actions. It does not require a stretch of the imagination to assume that action, motive, and belief are linked and that this linkage is demonstrated through actions taken by people in the past and in the present.

Portal (1987) argued for historical empathy as a heuristic or skill that involves the process of using evidence, imagination, and cognitive reasoning. Portal posited that historical empathy involves imaginative projection into a historical situation in order to reconcile the alien past with our present positionalities. Intuitive skills of observation and judgment are the backbone of a student's ability to see into the past and develop a "dialectical relationship between imagination and cognition" (p. 89). The beauty of historical empathy was its ephemeral nature, the way that it fit between the cracks of hard historical reasoning skills to produce nuanced understanding of human behavior.

The work of Ashby and Lee (1987) and Portal (1987) represents a movement toward mapping students' understanding of second-order structural concepts in history such as evidence, cause, and account (Lee, Dickinson, & Ashby, 1997). These pieces also reveal notions of constructivist learning principles, which would become a guiding framework for scholarship almost two decades later. Ashby and Lee (1987), for instance, argued that, "children often reach higher levels of understanding when arguing out a problem among themselves than they would achieve on their own, provided the problem is one they have some

strategies for tackling" (p. 86). Historical empathy is an opportunity for students to use evidence, make arguments, and disagree with others in the class. Importance does not rest on being correct but rather on recognizing that there are standards for historical investigation of perspectives in the past and that it is possible to uphold those standards while being right or wrong in different ways.

Emphasis on Historical Method

In the years that followed the initial attention to historical empathy in Great Britain, researchers in North America took up the construct and applied it to history teaching in the United States and Canada. This period was marked by a concerted effort to maintain high standards of professional history when using historical empathy in the classroom. Seixas (1993) posited historical-thinking elements comprised of historical significance, epistemology, and a triad of concerns that included agency, empathy, and moral judgment. Empathy should be exercised to "understand historical figures as agents who faced decisions, conflicts, constraints, and hardships under circumstances and with ways of thinking quite different from our own" (p. 303). Seixas found that students' personal experiences outside of school strongly influenced the way they understood history, suggesting that empathy was exercised, at least in part, by the connection of contemporary personal experience to situations faced by historical figures. The conflicts, constraints, and hardships mentioned by Seixas became a familiar pattern in historical empathy literature. It is easier to empathize with those whose situation invokes relatable empathy, and the curricular uses for empathy reflected this as researchers focused on the Holocaust, Neville Chamberlain's decision to appease Adolf Hitler prior to World War II, and Truman's decision to use the atom bomb in 1945.

Yeager, Foster, Maley, Anderson, and Morris (1998) built on Portal's (1987) work to define historical empathy as an active process within the historical method that results in students understanding events, words, and actions of the past. The authors suggested that empathy could help to fill in the gaps created between pieces of historical evidence, though they also made it clear that historical empathy was not to be solely based on imagination over identification or on sympathy. Stern (1998) drew from this work to define historical empathy as both a process and an outcome, resulting in students being able to understand historical events in context. Her contribution described the important role that deep understanding of context plays, especially when considering sensitive historical events such as the Holocaust. Riley (1998) added a critical component to the conceptualization of historical empathy by attending to the importance of reflexive thinking, bias, and historical antecedents. This emphasis is evident in her definition of historical empathy, which she expressed as the "reconstruction of others' beliefs, values, and goals, any or all of which are not necessarily those of the historical investigator" (p. 32). Riley stressed that historical empathy required the use of historical tools such as knowledge of audience or bias; reasonable knowledge of outcomes; critical examination of sources; awareness of the tentative nature of historical conclusions; examination of the antecedents to events; and the inclusion of voices, words, actions, and intentions of ordinary people.

Foster (1999) defined historical empathy as a process that leads to understanding and explanation of past actions by historical figures. He further clarified his definition of historical empathy by highlighting identification, imagination, and sympathy as characteristics he believed were not elements of historical empathy because they interfere with the perspective of hindsight, inference making, and reasoned objectivity, respectively. Foster may have been the most definitive in his argument for operationalizing historical empathy, though these points run thematically through other works of the 1990s. The importance of historical evidence to the engagement in historical empathy is obvious and ubiquitous in the literature. That point aside, the authors of this period all stressed the importance of bias, limiting imagination, using hindsight, and generating tentative conclusions, all of which are important to historical inquiry. We point them out not because they are controversial but because they are steadily conventional to the study of history. The rational and even-handed approach to third-person, historical conclusion-making, narrative creation, explanation, and argument would influence historical empathy scholarship in the years that followed and remain heavily cited almost 20 years later.

Historical Empathy and Perspective Taking in the Social Studies (Davis, Yeager, & Foster, 2001) contains a number of chapters that reinforce the importance of the historical method when engaging in historical empathy. Lee and Ashby (2001) defended the use of the word "empathy" in the SHP, arguing that it was misunderstood by "right-wing education-watchers" (p. 22). Lee and Ashby argued that applying the dictionary definition of "empathy" implies a larger than appropriate role for the affective dimension of empathy; they suggested that the term "rational understanding" might be substituted or concurrently applied. The authors also reprised their 1987 assertion that historical empathy is an achievement:

> It is not any kind of *process* at all, let alone a special *faculty*, but where we get to when we know what past agents thought, what goals they may have been seeking, and how they saw their situation, and can connect all this with what they did. Historical empathy and rational understanding, in this sense, are different names for an *achievement*. (Lee & Ashby, 2001, p. 24, emphasis in original)

The volume's other chapters reinforced the importance of fidelity to the historical method and, in doing so, attempted to bring greater disciplinary weight to the misunderstood term. VanSledright (2001) qualified the affective dimension of historical empathy, rebranding it as "empathic regard" and characterizing it as emotional empathy with historical figures whose actions can be judged by contemporary standards while also recognizing that temporal difference must temper that judgment. Reiterating the points he had previously made (Foster, 1999), Foster (2001) argued that "at its core historical inquiry remains a primarily cognitive, not an affective, act, and one that is chiefly dependent upon knowledge, not feeling or imagination" (p. 170).

Sociocultural Influence

Teaching History for the Common Good (Barton & Levstik, 2004) brought a sociocultural approach to many topics in history education, one of which was historical empathy. Sociocultural history educators, according to Barton and Levstik, hold the belief that every history is somebody's personal history and that we live in related groups within a pluralistic society. Additionally, history is constantly changing and no single story can be exclusively our story. This bottom-up approach to history had an impact on the manner in which historical empathy was portrayed in the literature. Barton and Levstik defined empathy as "using the perspectives of people in the past to explain their actions" and conceptualized empathy as two interrelated constructs—perspective recognition and care (p. 208). Empathy as perspective recognition represented the cognitive dimension and was divided into five elements: (1) *sense of otherness*—recognition that other's beliefs are likely different from our own; (2) *shared normalcy*—people in the past were just as human as we are and their actions were not ignorant, stupid, or delusional; (3) *historical contextualization*—reconstructing past perspectives requires knowledge of historical context; (4) *multiplicity of historical perspectives*—not everybody holds the same belief at any given point in time; and (5) *contextualization of the present*—perspectives today, including our own, depend on historical context. These five elements held many similarities to the conceptualizations of historical empathy from the past with an emphasis on temporal context, avoiding presentist thinking, impositionality, and use of hindsight for contextualization.

Where Barton and Levstik broke in a significant way from previous scholarship was with their conceptualization of empathy as care, which they introduced by arguing that "empathy without caring sounds like an oxymoron" (p. 228). Recognizing that students' feelings about history cannot be easily separated from the way they think about it, Barton and Levstik (2004) nevertheless argued that dispassionate analysis of history is not superior to inquiry in which affective considerations are involved. Barton and Levstik posited four types of care in history: (1) *caring about* people and events of the past; (2) *caring that* particular events took place; (3) *caring for* people in the past; and (4) *caring to* change our beliefs and behaviors based on what is learned. Unlike prior iterations of historical empathy that emphasized the importance of distancing the historical investigator from the historical figures they are empathizing with, Barton and Levstik's conceptualization involves the student as a central figure in the process. Their work had significant influence on scholars who researched historical empathy in the wake of the 2004 book (e.g., Brooks, 2008, 2011; Endacott, 2010; Kohlmeier, 2006).

Skolnick, Dulberg, and Maestre (2004) took affective engagement in historical empathy a step further than what Barton and Levstik proposed. In their *thinking-feeling spiral*, the authors encouraged inquiring and imagining through personal concrete connections including personal experiences, individual stories, and pictures or objects. The thinking-feeling spiral moves students back and forth between perspective taking and affective engagement as they scaffold upward toward historical understanding. In a significant departure from prior

arguments for third-person dispassionate analyses, Skolnick et al. (2004) suggested that students assume first-person positionality and "act as if" they are historical figures by writing, drawing, dialoguing, or simulating. To date, this work remains lightly cited, perhaps because of the provocative assertion that students should believe they can actually identify with the historical figures they study.

Endacott (2010) drew conceptually from social psychology to determine how students engaged in the affective dimension of historical empathy. He described historical paradoxes as distinctly human problems, and therefore consideration for affective concerns would add another dimension to students' understanding of historical figures' decisions and actions. This approach combined the ideas of perspective recognition (Barton & Levstik, 2004) with self, group, and other related questions (Skolnick, Dulberg, & Maestre, 2004) to foster cognitive and affective shaping of students' historical understanding. It is important to note here that the injection of affective consideration for historical figures was far from a universally accepted idea. Other scholars during this time period continued to focus on the notion of historical empathy as a purely cognitive exercise (e.g., Bryant & Clark, 2006; Yilmaz, 2007) or as "collective mentalités" (Lee & Shemilt, 2011, p. 40).

The sociocultural approach invited teachers to focus on underrepresented figures in the historical record such as child laborers (Skolnick et al., 2004), Native Americans on the Trail of Tears (Barton & Levstik, 2004), peasant women (Kohlmeier, 2006), Lowell Mill girls (Brooks, 2008), and Aboriginal Australians (Nygren, 2016). The shift toward studying the "lived experiences" (Endacott & Brooks, 2013) of a plurality of historical figures rather than just focusing on the decisions of prominent historical decision makers was an important one. However, we believe that the sociocultural influence on historical empathy was most impactful in its reconsideration of educational ends and means. The majority of earlier scholarly works viewed the goal of historical empathy as the successful reconstruction of historical perspectives in order to accurately reconstruct history through exposition, narrative, or argument. Given the emphasis on fidelity to the historical method in the earlier work, an end goal that reflected the concerns of historians naturally followed. Historians attempt to reconstruct the past. History *educators*, on the other hand, do not unanimously share the view that the successful reconstruction of the past is of highest importance to our work.

Historical understanding is unquestionably important, but if students simply process, create, and communicate historical understanding without any sort of appreciable impact upon their prosocial democratic behavior then, in our view, one of the key goals of history education has not been met. We believe that history educators should foster citizenship. The difference in disciplinary epistemologies is rarely mentioned in discussions of historical empathy, but failing to consider educational outcomes hinders thoughtful consideration of the means by which they might be achieved. The sociocultural influence on historical empathy opened new avenues to exploration, while also raising important questions about issues that had seemingly been settled.

A Recent Reconceptualization

We recently posited a theoretical model that defines historical empathy as

> the process of students' cognitive and affective engagement with historical figures to better understand and contextualize their lived experiences, decisions, or actions. Historical empathy involves understanding how people from the past thought, felt, made decisions, acted, and faced consequences within a specific historical and social context. (Endacott & Brooks, 2013, p. 42)

In contrast to earlier conceptualizations of historical empathy that distanced themselves from technical or dictionary definitions of "empathy," this theoretical model conceptualizes historical empathy as a dual-domain construct that draws from social psychology, a field in which

> there is broad agreement on three primary components: (a) an affective response to another person, which often, but not always, entails sharing that person's emotional state; (b) a cognitive capacity to take the perspective of the other person; and (c) emotion regulation. (Decety & Jackson, 2006, p. 54)

This dual-domain conceptualization of historical empathy requires the following three interrelated and interdependent endeavors:

- Historical Contextualization—a temporal sense of difference that includes deep understanding of the social, political, and cultural norms of the time period under investigation as well as knowledge of the events leading up to the historical situation and other relevant events that are happening concurrently.
- Perspective Taking—understanding of another's prior lived experience, principles, positions, attitudes, and beliefs in order to understand how that person might have thought about the situation in question.
- Affective Connection—consideration for how historical figures' lived experiences, situations, or actions may have been influenced by their affective response based on a connection made to one's own similar yet different life experiences. (Endacott & Brooks, 2013, p. 43)

In this model the cognitive understanding of historical context and perspective shapes the affective connection made with historical figures in a similar fashion to contemporaneous empathy (Eisenberg, 2000; Hoffman, 1984). Earlier works argued for treating this temporal difference in context and perspective with strict adherence to dispassionate impositionality (Foster, 1999, 2001; VanSledright, 2001), specifically warning against identification with historical figures. We recognize that identification is not necessarily desirable, especially in instances where the identification is objectionable (e.g., Adolph Hitler or Antebellum slaveholders) or simply impossible due to incomparability of experiences (e.g., Holocaust victims or African American slaves). However, we assert that identity

and empathy are closely related constructs (Hardy, 2006; Hunt, 2006) and that empathy does not disable one's ability to maintain a sense of being different from the people one is empathizing with (Hoffman, 2000). We support the perspective taken by Retz (2013), who applied the philosophy of Collingwood (1994) and the hermeneutics of Gadamer and Weinsheimer (2006) to portray temporal difference not as an obstacle to overcome but as a "field of energy" (p. 11). This field of energy enables students to explore historical figures' thoughts and actions by finding commonalities between past and present actions in order to contextualize the thoughts of historical figures while critically examining their own historicity.

Our definition and conceptualization is influenced by sociocultural history educators and runs contrary to many points made by those who promote a more dispassionate approach that maintains fidelity to the historical method. However, we also believe that asking students to empathize without engaging in fully half of empathy's core dispositions fails to account for the power that fear, love, anger, hope, pride, greed, or any number of emotions has on one's decision making. The affective dimension of historical empathy can help students to humanize historical figures, appreciate their "shared normalcy" (Barton & Levstik, 2004), and understand why seemingly rational people sometimes act in wholly irrational ways. Therefore, we reprise our assertion that

> any attempt at "historical empathy" must include historical contextualization, perspective taking, and affective connection. Historical inquiry not encompassing all three of these aspects may be accurately described as "historical perspective taking" or "affective connection to history," but cannot be called "historical empathy." (Endacott & Brooks, 2013, p. 43–44)

Rationales for Developing Historical Empathy in the Classroom

Just as 30 years of research on historical empathy have produced competing conceptualizations of the construct, the scholarship also offers differing rationales for curricular attention to historical empathy. Some authors have devoted only a sentence or two to why empathy should be promoted in history classrooms; in other cases, a rationale is more or less implied rather than explicitly stated. Conversely, several scholars have made clear arguments for students' development of historical empathy, and these pieces have exerted considerable influence on the related empirical research undertaken in their wake.

In the 1990s, scholars writing in support of historical empathy as a curricular aim did so by arguing its central role within the discipline of history (Foster & Yeager, 1998; Seixas, 1996). In his effort to conceptualize historical understanding as a goal of history education, Seixas (1996) identified empathy and moral judgment as one of six essential components. He argued that empathy is crucial to any child or scholar's effort to understand historical actions and ideas. Empathy is what enables the student of history to "provide interpretations that more fully comprehend a foreign climate of opinion, and thus to understand otherwise

inexplicable actions and statements" (p. 775). That is to say, empathy equips one to draw on human commonality to help understand unfamiliar and sometimes confusing human ideas and actions. This affinity, tempered by a recognition of distance between the past and the present, is what yields plausible historical interpretations.

In a similar vein of thinking, Foster and Yeager (1998) argued that "historical empathy merits specific attention because historians must bring it to their inquiry in order to analyze the events, actions, and words of key figures in the historical record" (p. 1). These authors explained the task of historical understanding as seeking to fill in the gaps of incomplete historical evidence to produce a reasonably accurate portrayal of the past. They viewed historical empathy as an element of historical thinking that builds on knowledge of context and consequence (hindsight). Historical empathy enables the inferential thinking and imaginative reconstruction needed to explain why people believed and acted as they did in the past. Colby (2008) echoed these assertions a decade later by claiming that "the primary purpose of historical empathy is to enable students to transcend the boundaries of presentism by developing rich understandings of the past from multiple viewpoints, particularly those of the historical agents" (p.62). Statements of this kind place chief emphasis on empathy's role in yielding valid historical understandings.

At the same time, Foster and Yeager (1998), Seixas (1996), and Colby (2008) suggested—albeit vaguely—a larger purpose for historical empathy beyond historical interpretations for their own sake. By pairing empathy with historical judgment, Seixas (1996) posited that empathy contributes to a process by which the student of history can form opinions about beliefs and actions in the past. Likewise, Foster and Yeager (1998) claimed that students should use "hindsight as a way of understanding and interpreting the past in a meaningful way" (p.1). Colby (2008) expressed that students might be "taught to apply their empathetic considerations to every aspect of democratic life" (p.62). In this way these authors hinted that the results of empathic reconstruction of past perspectives might aid students in evaluating the past from the position of the present and in understanding their current world.

Barton and Levstik (2004) were decidedly clearer about the utility that historical empathy could hold for students' lives. They contended that historical empathy has a key role to play in preparing students for active engagement in a pluralist democracy because it holds clear implications for students' thinking and action in the present. For instance, they claimed that empathy as perspective recognition should involve students in exploring the historical context of their own beliefs. Blake (1998) made a similar assertion when he wrote that "central to the nature of empathy is its illumination of our selves, our being, and our perspectives; in short, empathy gives us a powerful hand on self understanding" (p. 28).

Barton and Levstik (2004) also asserted that awareness that one's beliefs are influenced by societal factors is fundamental to the respectful deliberation that democracy requires. Similarly, the affective component of historical empathy also has the potential to prepare students for life in democratic society. They explained that historical empathy involves students in turning their attention to an aspect of the past, forming a moral response to actions in the past, and

displaying a desire to respond to wrongdoing in the past. Additionally, historical empathy should result in students caring to use their understanding of the past to take action in the present for the common good. Barton and Levstik stated simply that "care is the tool … for rendering history meaningful" (p. 241). These claims about historical empathy are part of a larger argument that history education should be guided less by the academic discipline of history and more by the ways in which students can utilize history in their everyday lives (Barton, 2009).

We have argued in our own work that historical empathy can have "both proximate goals (i.e., those that are related to immediate curricular objectives in the classroom) and ultimate goals (i.e., those that deal with understandings, skills, and dispositions that an individual might benefit from for a lifetime)" (Endacott & Brooks, 2013, p. 44). For instance, exercises in historical empathy help students understand the complexity of idea formation, decision making, and acting both in the past and in the present. Additionally, historical empathy can help students learn to establish connections between the past and the present, either by drawing parallels between historic events and present-day affairs or by finding antecedents to present-day perspectives and practices. Finally, historical empathy might lead to a dispositional appreciation for the complexity of situations faced by people in the past and the need to act for the good of others. This work helped reconcile some seemingly competing claims about the purpose of historical empathy by demonstrating how more short-term curricular goals might well serve larger societal goals.

Critiques of Historical Empathy

The literature on historical empathy includes some critique of the endeavor on several counts. The nature of the critique, of course, depends on the manner in which historical empathy and its purpose has been conceptualized. In the 1980s, when empathy was a newly popularized goal of school history, some scholars were quick to point out that ambiguity about the meaning of the term could lead to poor instructional practices. Knight (1989) argued that the association of empathy with affect and emotion might lead some teachers to encourage students to sympathize with the sadness of past people. This, he posited, might promote the misconception that people in the past were perpetually morose. Additionally, the effort to "feel" and "imagine" might displace the difficult act of understanding historical others in their particular contexts.

According to Jenkins (1991), "empathizing effectively is impossible" because one simply cannot enter into the mind of another person. When individuals seek to understand the past, they "bring their own mind-set programmed in the present" (p. 48) which precludes them from grasping an altogether different mind-set. While personal ideas and assumptions impede historical empathy, they are the very things that make it possible to engage in the historical method in the first place. That is to say, we rely on certain epistemological, ontological, and existential assumptions to construct any understanding of the past. Jenkins also asserted that attempts to contextualize the actions of past people are so bound by the ideas of other individuals about the past that we are engaging with something less than actual historical context and therefore not actually empathizing.

VanSledright (2001) echoed some of these ideas about the difficulties inherent in historical empathy. He argued that historical empathy requires a "Herculean level of self-examination concerning our assumptions and experience- and knowledge-based theories of the world, about the past, and about the future" (p. 59). Because so many of these assumptions are common or taken for granted, he expressed doubts that they could be adequately identified. Yet, he was unwilling to abandon the notion of historical empathy altogether. Rather, he proposed that while it cannot be achieved in any fully direct, unmediated way, historical empathy as a relative achievement may occur when the inquirer's positionality intersects with that of the producer of a historical artifact. He maintained, however, that it is impossible to fully tease out how much this historical empathy is the result of historical contextualization or of a present-mindset.

By contrast to earlier critics, Barton and Levstik (2004) expressed less concern with students' ability to bracket out their own positionality in order to more accurately entertain historical perspectives. In fact, these authors worried that by focusing intently on reconstructing historical perspectives, instruction for historical empathy can prioritize the causes of events and ignore their consequences. For example, students might only be asked to explore why Harry Truman chose to drop the atomic bomb instead of considering the impact of the decision. Investigations of this sort could minimize issues of justice and fairness and remove opportunities for students to deliberate over the common good. Barton and Levstik wrote that "focusing too exclusively on the recognition of historical perspectives, in other words, may help us learn how to talk with others, but it gives us precious little to talk about" (p. 223). If the goal of history education is to prepare students for engagement in participatory democracy, a curricular emphasis on historical empathy may have some limitations.

Metzger (2012) cautioned that certain types of classroom-based experiences might allow the "caring" aspect of historical empathy to overrun attention to historical context and impede students' ability to learn and apply content knowledge to significant historical questions. In particular, exposure to emotionally powerful representations of the past such as feature films may lead students to "over-empathize"—that is, they may become convinced that they truly understand a historical perspective, when they actually have little understanding of the context in which a perspective existed. Metzger warned that students might "draw uncomplicated, even naïve connections between emotionally powerful events depicted on the screen and our world today" (p. 407). Such a response might ultimately limit a students' ability to use knowledge of the past to better understand and act in their current world.

Promoting Historical Empathy in the Classroom

Numerous researchers have sought to better understand which types of classroom-based experiences are conducive to promoting historical empathy at different grade levels. Studies have suggested that teachers might utilize a wide range of sources and exercises for this purpose, yet there is some consensus regarding several critical attributes of any effort to advance historical empathy.

For instance, because of the centrality of historical context to historical empathy, students should have background historical information about a situation or time period before they endeavor to empathize with an individual in that context. Textbooks, documentary film, historical statistics from national or regional polls, and chronological timelines have proved fruitful for this purpose (Brooks, 2008, 2011; Doppen, 2000; Foster, 1999). Endacott (2010) demonstrated the utility of providing background information specifically about the historical individual that students would then be asked to empathize with.

Central to almost any effort to invite students to explore the thoughts and feelings of historical characters is primary source work. Several studies have shown how students might analyze extensive document collections—in some cases 20 or more sources—to dig deeply into historical context as well as into the thoughts and feelings of historical individuals (Brooks, 2008; Doppen, 2000; Endacott, 2010, 2014; Foster, 1999; Friedman & Garcia, 2013; Yeager et al., 1998). Other scholarship suggests that even a single, purposefully chosen primary source can elicit historical empathy. Kohlmeier (2006) asked high school students to use a first-person narrative to examine the perspective of a historical figure and found that they responded by displaying both the cognitive and the affective dimensions of historical empathy. Likewise, Endacott (2010) determined that primary sources such as journal entries and letters or speeches that originate from the historical figure can most effectively provide students with a sense for how historical figures thought and felt. In a high school history classroom, Brooks (2011) observed that visual evidence, such as photographs, prompted students to bring their own affective responses to personal situations to bear on their understanding of the lived experiences of others. Endacott (2014) found that examining graphic visual and textual evidence of the aftermath of the atomic bomb elicited strong personal reactions from students. These displays of sympathy, even personal distress, caused students to disengage from discussion of the sources and therefore inhibited their ability to empathize.

Primary source work aimed at the development of historical empathy requires students to ask basic sourcing questions (Foster, 1999). Additionally, several studies indicate that essential questions can be used to encourage empathic engagement with historical persons. For example, Brooks (2008) asked students to consider, "Why did young women choose to leave farm life to find work in the mills?" Kohlmeier (2006) posed more specific questions such as, "What would Irina [a Russian peasant living under Stalin's regime] consider the greatest contributing factor to her sufferings?" (p. 41). These questions focused students on perspectives and emotions. By contrast, teachers who took part in Cunningham's (2007) study found that poorly conceived, off-the-cuff questions (such as "What would you want to ask yourself to find out more about your life?") detracted from students' ability to empathize with an unfamiliar historical perspective (p. 614).

Bryant and Clark (2006) analyzed *Canada: A People's History* in order to consider the utility of documentary film for the promotion of historical empathy. They argued that the film's reliance on a story form and relatable themes "suggest problems for students in cultivating historical empathy because it encourages them to access personal experiences rather than cognitive tools to make judgments" (p. 1048). The authors asserted that because it does not include

historians offering interpretations of the content, this documentary source might detract from students' awareness of the complicated process one must undergo in order to reconstruct historical perspectives.

While a variety of instructional activities have been shown to promote the display of historical empathy, each of these activities brings affordances and constraints. Several studies report that discussion and debate can be effective in promoting students' analysis of sources and exploration of historic perspectives. Whether these discussions occur in small groups (Doppen, 2000) or involve the entire class (Brooks, 2011; Kohlmeier, 2006), they allow students to hear different ideas and expand their thinking related to the thoughts and feelings with which they are seeking to empathize. Kohlmeier (2006) discovered that seminar-style discussions enabled her, as the teacher, to "remind students of their prior knowledge of the time period, challenge their assumptions about the beliefs and practices of the historical figures, and assist them as they analyzed what information was important and what was inconsequential" (pp. 40–41). Jensen (2008) found debate to be an effective way to invite students to consider different historical perspectives. The fifth-grade students in this study were required to debate a historical issue from an assigned historical perspective. Again, a perceived instructional advantage of these debates was the opportunity they provided the teacher to identify and address misunderstandings.

Multiple studies have examined the impact of different writing assignments on students' ability to display historical empathy. Third-person essay assignments, structured around questions that invite attention to historical thoughts and feelings, encourage students to make evidence-based claims (Foster, 1999). However, depending on the nature of the prompt, these same assignments may discourage the inferential thinking and attention to affective concerns that historical empathy requires (Brooks, 2008). Endacott (2014) found that high school students, writing third-person essays about Truman's decision to drop two atomic bombs, were able to alternate between Truman's perspective and their own. The opportunity to explore both of these perspectives might advance immediate curricular objectives as well as the long-term dispositional aims that historical empathy might serve.

First-person writing assignments offer an opportunity for students to express the ideas and feelings of a historical character (Endacott, 2010; Skolnick, et al., 2004), but they also encourage presentism by inviting students to imagine how they would think and feel in historical situations. D'Adamo and Fallace (2011) investigated the impact of engaging fourth graders in the creation of multigenre research projects to promote historical empathy. These projects required students to present different historical perspectives from a single time period through different genres of writing (e.g., first-person journal entries, letters, newspaper articles, poems, short stories, timelines). The students demonstrated growth in their understanding of the multiplicity of historical perspectives but struggled to explain historical perspectives, particularly through certain genres (e.g., short stories and timelines).

Endacott and Brooks (2013) have suggested that instructional exercises in historical empathy should extend beyond historical contextualization, source work, and display to involve a fourth element—reflection. Such reflection would invite

students to consider how their understanding of the past might inform their thoughts, emotions, and actions in the present. This might involve determining the historical context of modern-day ideas and situations; drawing parallels between the past and the present; or forming personal opinions about historical perspectives, feelings, actions, and circumstances studied. Little research has examined how teachers can and do encourage their students to connect the development of historical empathy to the present. Because of this, little is known about the extent to which instructional exercises in historical empathy actually achieve the ultimate purposes that scholars such as Barton and Levstik (2004) believe they might.

Measurement of Historical Empathy

Efforts to measure historical empathy stretch back to the earliest debates over its conceptualization as an achievement or a process. If historical empathy is indeed an achievement, a framework for evaluation would logically accompany a given conceptual model. One such model, posited by Ashby and Lee (1987), built on Shemilt's (1984) "empathic stages" and was not developmental in the Piagetian tradition, but was instead a logical hierarchy of understanding. This hierarchy consisted of five levels briefly summarized here as: (1) '*divi' past*—students retain presentist notions of superiority in the present; (2) *generalized stereotypes*—students resort to using conventional or stereotypical generalizations to explain specific actions; (3) *everyday empathy*—students engage in empathy, but in a contemporary sense without consideration for historical context; (4) *restricted historical empathy*—students empathize with historical figures within historical context but are unable to transfer that understanding to other situations; and (5) *contextual historical empathy*—students are able to contextualize historical actions within their specific context as well as relate their understanding to other events in the past and in the present. According to Ashby and Lee (1987), there were many factors that played a role in where students stood in relation to this scale, including familiarity with historical content and the relative strangeness of the actions or institutions they were investigating. This framework has been used in recent years by researchers drawing from the work of Ashby and Lee to quantify historical empathy (e.g., Berti, Baldin, & Toneatti, 2009; Rantala, Manninen, and van den Berg, 2015).

Historical empathy was included as one dimension of historical understanding in Project CHATA (Concepts of History and Teaching Approaches 7–14), a research study designed to ascertain the degree to which British students ranging in age from 7 to 14 developed historical understanding. Researchers determined students' understanding of past actions and institutions by asking them to explain Roman Emperor Claudius's decision to invade Britain in the year 43, the Roman practice of killing all remaining slaves in a household if the master was killed by a slave, and the Anglo-Saxon practice of trial by oath-helping and ordeal as a method to determine a person's innocence or guilt. In reporting on the findings of this project, the authors used the term "rational understanding" as an umbrella for empathy and the explanation of historical figures' actions or social practice

(Lee, Dickinson, & Ashby, 1997). Students' responses demonstrated evidence of a progression in understanding from a basic grasp of human motivation and desires to identification of plausible explanations for the figure's actions. Older students were more likely to use situational analysis (i.e., reasoning in historical context), while also being less likely to explain historical actions by attributing them to purely personal reasons. Likewise, older students were more likely to recognize the temporal difference between what we know now and what Claudius would have known at the time of his invasion. Younger students were more likely to provide practical or moral deficit explanations for historical practices or institutions, while older students were more likely to understand the influence of cultural practices such as religion, connect these practices to efforts to maintain social order, and use historical context to situate their responses (Lee & Ashby, 2001).

Finland's National Board of Education assessed students' knowledge of history in the spring of 2011 (Rantala, 2012). Historical empathy is an objective in the Finnish Core Curriculum, and this assessment utilized two open-ended questions based on American servicemen's treatment of German prisoners of war during World War II to assess students' historical empathy. The questions asked students to explain why American soldiers treated German prisoners poorly and why they were not punished for these acts. Students read a newspaper article from the perspective of a German prisoner and provided their explanations in expository form. The students' responses were scored on a three-point scale with students receiving one point for each plausible reason they provided from a list of possible explanations. In another Finnish study, Rantala et al. (2015) used simulation to engage students in historical empathy. Based on the Finnish Civil War of 1918, the students assumed a first-person historical perspective in order to choose between either the "reds" or the "whites." Rantala et al. (2015) used a survey of students' content knowledge, essays, and interviews to evaluate their achievement of historical empathy based on the five levels provided by Ashby and Lee (1987). Of the 22 students participating in the study, only six were placed at the two highest levels.

Researchers who have worked to measure historical empathy have provided some valuable insight by describing what historical empathy looks like and the barriers students face when trying to develop historical understanding. The CHATA research helped to unpack students' understanding of historical actions, institutions, and events and paint a picture of what it looks like when students understand rational actions based on shared conventions or fail to use historical context and perspectives. Lee and Ashby (2001) even gave inner voice to students' presentist tendencies:

> Change takes place when people suddenly realize (by experiment or on the basis of someone's insight or wisdom) that they have got things wrong, or when technological advances allow obviously "better" ways of behaving. So if no rationale (practical inference) can be constructed in our terms to make sense of an action or institution, it was probably benighted in some way, generally as a result of ignorance or poor technology. (p. 44)

Others who measured historical empathy provide similar insights, such as the CHATA replication study in Italy (Berti, Baldin, & Toneatti, 2009) that found

Italian students' responses to be more advanced than their British counterparts, possibly due to the predominance of the Catholic faith and its belief in miracles as a normalizing influence on the students' thinking. Another example would be the Finnish researchers who concluded that historical empathy might have been hindered by "stage fright" due to students' participation in an open simulation and the lack of information students were provided about the historical identities they were to assume (Rantala et al., 2015, p. 341).

Critiquing Efforts to Quantify Historical Empathy

It is important to consider the particular context in which efforts to measure historical empathy have been developed. The frameworks for measurement formulated in the 1980s by British scholars were partially in response to research conducted in the prior decade (e.g., Hallam, 1979) that examined historical thinking using a Piagetian developmental perspective and measured historical understanding by testing students' recall of historical information. Based on this mode of measurement, Hallam concluded that historical thinking occurred only after students reached Piaget's formal operational stage of development, suggesting that it was only appropriate for students of high school age. The research conducted in the 1980s sought evidence of students' ability to engage in dimensions of historical understanding by dissecting students' responses to see what lay beneath the surface. Project CHATA is a prime example. Creating a framework for evaluation based upon a nondevelopmental approach to historical thinking provided evidence of students' ability to engage in historical thinking at various ages and to differing degrees.

It is our contention that measuring historical empathy is problematic since it involves the individual and social construction of multifaceted facts, contexts, perspectives, beliefs, predilections, emotions, and positionalities. The relationship between historical figure and historical investigator is constantly shifting and highly personalized; there are any number of factors that impact a student's overall ability to engage in historical empathy. These factors include, but are not limited to, the nature of the historical figure, the positionality of the historical investigator, context of the investigation, and one's ability to assemble understanding from pieces of evidence. Attempts to identify an overall "score" for historical empathy might capture a portion, perhaps even a considerable portion, of this understanding but at the expense of standardizing some of the humanity out of the process.

Research has demonstrated that students' negotiation of this process does not follow the same path and that students' understanding evolves with each new piece of evidence they encounter (Endacott, 2014). This finding calls into question the validity of empathy measurements that evaluate students' engagement in historical empathy based upon a predetermined list of possible responses after they engage with only a handful of sources. Take, for example, the recently published study that purported to measure historical empathy using students' self-reported level of agreement with three statements: (1) I have a good understanding of how early Americans thought and felt; (2) I can imagine what life was like for people 100 years ago; and (3) When looking at a painting that shows people, I try

to imagine what those people are thinking (Greene, Kisida, & Bowen, 2014, pp. 5–6). Such an effort to measure empathy is conceptually and methodologically weak and thereby injurious to historical empathy's status as a serious mode of inquiry, especially when others use it to justify their own work (e.g., Kushins, 2015). This is precisely what earlier scholars warned against—historical empathy devolving into fanciful exercises of imagination (Foster, 2001).

We also argue that measuring historical empathy somewhat misses the point. If historical empathy is a process by which students develop historical understanding, rather than an achievement marked by the ability to create accurate historical accounts, we fail to see the merit of bearing down on a historical empathy score. The ability to demonstrate historical understanding, say through the display phase of historical empathy (Endacott & Brooks, 2013), is only a snapshot of that development (Endacott, 2014). Understanding does not end when students create a narrative or an argument which can then be scored. If students wash their hands of the historical matter after writing a short paper or completing some other measurable assessment then we are failing to take advantage of the understanding that historical empathy has fostered. This is one reason we argue for the inclusion of reflection whereby students contextualize historical events, grapple with their antecedents, and connect past to present (Endacott & Brooks, 2013).

Quantifying historical empathy is also shortsighted because it fails to properly account for the "so what?" question. What does it mean for students to score at level 5 or say they feel more empathetic after looking at some paintings depicting historical events? What does this actually mean in terms of changing who they are as citizens of their communities, nations, or the world? Similarly, the concept of "citizen" is difficult to measure, at least in a sociocultural context in which we hope our students exercise their role as citizen to act for the common good in a pluralistic world. Therefore, given the difficulties, if not impossibilities, of precisely determining the "level" of a student's historical empathy, and the equally problematic notion of measuring the nuances of civic behavior, we conclude that measuring historical empathy holds minimal utility in the real world where citizenship is a largely qualitative endeavor.

Our position on quantifying historical empathy is certainly not one that is universally shared by the scholarly community or political establishment. We espouse a specific conceptualization of historical empathy, its role in a specific brand of epistemological thinking in history education, and a distinct notion of transforming understanding into pluralistic civic action. Our conceptualization of historical empathy is unapologetically constructivist and student-centered. The instructional process and use of evidence is designed to develop three aspects of historical empathy that exist inimitably within each student's consciousness. In that sense, historical empathy is unique to the individual, its impact upon future thoughts and actions dependent upon that individual's identity, context, positionality, understanding, and relationship to knowledge created.

However, historical empathy has become more widely recognized for its value to social studies education during a period of educational history dominated by the belief that national economic success is dependent upon educational success and that schools should be held accountable for that success by quantifiable and

externally verifiable tests (Mehta, 2013). Despite the lack of evidence for this dependent relationship, the current educational paradigm wildly exaggerates the effects of public schools on the economy (Harris, Handel, & Mishel, 2004; Tienken & Orlich, 2013), leading to unprecedented federalization of education policy and willingness to define student achievement exclusively by standardized test scores (Guthrie & Springer, 2004). Given the current educational paradigm, it comes as little surprise that efforts would be made to define and operationalize historical empathy as a quantifiable and measurable educational outcome that conforms to the politically acceptable definition of "achievement." Perhaps historical empathy is not a compatible construct for those who privilege quantifiable outcomes over qualitative nuance.

The Future of a Contested Construct

Historical empathy, the term born out of the rejuvenation of a history curriculum and repudiation of strictly developmental perspectives on historical thinking, has now evolved into a well-developed yet still contested construct. Agreement on whether historical empathy is an achievement or a means to a larger end has not been reached. Likewise, the role that affective considerations play in the engagement of historical empathy remains similarly unsettled. These contestations are not wholly surprising given that the nature of empathy itself is debated in numerous articles and books in the fields of psychology and philosophy.

Lack of conceptual congruence is consistent seemingly everywhere that empathy is discussed in a scholarly fashion and is almost certainly one reason why scholars enjoy considerable latitude for invoking historical empathy in the literature. In far too many pieces, the term historical empathy is included, in often an almost offhand fashion, to augment one's description of a particular educational practice without actually grounding said practice in related literature (e.g., Alarcon, Holmes, & Bybee, 2015; Dundar, 2015; Fantozzi, 2012; Marino & Crocco, 2015; Schrier, 2015; Shaw, 2007; Shreiner, 2014). Such uses of historical empathy are not necessarily injurious to its status as a meaningful mode of historical inquiry, though they do illustrate how an imprecise construct can be invoked without raising many academic eyebrows. Given this situation, finding conceptual consensus and solidifying scholarly efforts behind a single interpretation of historical empathy is an educational imperative.

Ideally the future of historical empathy is one in which scholars and classroom educators explore benefits beyond the mastery of content, what we have previously referred to as the "broader understandings, skills, and dispositions that might impact the entirety of a student's life" (Endacott & Brooks, 2013, p. 44). What might this look like? Future research might examine historical empathy's potential to impact prosocial civic behavior as an extension of the process students engage in when using historical empathy to understand the past as a classroom-based exercise. Research shows that prosocial identity and empathy are related to prosocial behavior, and scholars in psychology and philosophy have been intently examining these in conjunction with moral identity (Hardy,

2006). It would be valuable to know more about the role that identity (not identification) plays in students' engagement in historical empathy and how that might transfer to prosocial behavior. The National Council for the Social Studies' recently published *College, Career, and Civic Life (C3) Framework for Social Studies State Standards* present an excellent opportunity to explore empathy and prosocial behavior under their fourth dimension: Communicating Conclusions and Taking Informed Action (National Council for the Social Studies [NCSS], 2013).

Future research also should consider a more pluralistic approach to the types of historical figures that students are invited to empathize with. What unique challenges and opportunities present themselves when students are asked to explore the perspectives and experiences of those who are frequently marginalized by traditional history curriculum? Some very interesting research in museums has explored empathy's role in understanding counter-narratives surrounding Antebellum slavery (e.g., Cook, 2015; Modlin, Alderman, & Gentry, 2011), though these same pieces have raised pertinent questions about the limitations of empathy as a mode of understanding subjugated knowledge. To be clear, we do not suggest that history educators promote empathy as a universally applicable mode of understanding. Empathy is limited, just as any path to understanding is, though recognizing our limitations when empathic understanding is not possible can also be quite educative (Endacott, 2014). Attempts to empathize should not bear the assumption of understanding, but rather the intent to develop it. Likewise, selection of historical figures with whom we empathize should always be done with care and mindfulness that trying to understand the nature of another's situation is not always appropriate.

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9

Historical Agency: Stories of Choice, Action, and Social Change

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Thomas King (2003) reminds us that "Stories are wondrous things. And they are dangerous" (p. 9). Stories are wondrous because they are powerful medicine—but, as the ancient Greek word *pharmakon* denotes about medicine, that which we once needed can also become our poison. In reviewing a wide range of work for this chapter, I am beginning to better appreciate King's related claim which I have been struggling to understand for many years: "The truth about stories is that that's all we are" (King, 2003, p. 2).

Research communities arrange themselves through recognized problems to be solved and accepted methods of doing so. Any "problem" is but a powerful story around which researchers identify, stories themselves entangled and conveyed within larger stories of the nation, its development over time, its purposes, its values and, in some cases, its alleged destiny (Said, 1993; Willinsky, 1998). Such stories also convey particular understandings of people, their motivations, and a common good toward which we should strive. A necessary question concerns whether, today, our inherited stories about the nation, agency, and change over time serve us well or ill.

In this chapter, I engage a range of scholarship in hope we might take up more reflexively those stories we have been taught about agency's *shape*, beliefs about being human among others, and its *content*, the intentions and motivations we use to explain historical action. As I hope to show, the ways we engage in questions of agency reflect broad group struggles over the stories available for individuals to form social identities through which we learn to subjectively read the world.

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Agency in History Education

History education in state-sanctioned schools serves the project of nation building. It further serves that interest by conveying stories about who was responsible for such work. History education, therefore, serves to create not only "imagined communities" but also a particular image-ing of how that community formed, functions, and continues to evolve. Such stories provide youth with role models of efficacious action.

Drawing from their review of social psychology research and their own empirical studies, Markus and Kitayama (2002) describe the model of agency most commonly expressed through the mainstream stories told in classrooms, movies, and national newspapers in the North American and Western European public sphere:

> According to the dominant American middle class model, normatively "good" actions should be primarily the results of the individual's own desires, goals, intentions or choices; the independent self is foregrounded as the source of action while others are fixed in the background. Agency is constructed as personal and bounded within the individual. This model of agency as disjoint, or as disconnected from others and rooted solely in the individual, is widely distributed and inscribed in mainstream American society; it is expressed by social scientists, reflected in the media, and echoed by individuals talking about themselves. (p. 6)

As research reveals, many students of all ages adopt this storied characterization to explain change through time and the actions of those deemed responsible (den Heyer, 2003).

To summarize in highly abbreviated form, most students in these studies reason that social and political change result from heroic individuals engaged in individual power struggles. Students reason that social changes result from iconic individuals who convince others that their beliefs should change and who take actions to support such (e.g., about race, about women as political agents, about colonialism). McDiarmid (1994) provides an exemplary summary of this reasoning in his study with undergraduate students during a seminar on historiography:

> [Students] seemed to view the civil rights movement as the sum of individual heroic acts like those of Rosa Parks and Martin Luther King in the face of Southern bigotry and violence. None treated the movement as a culmination of a long struggle in which people had organized themselves to challenge discrimination. (p. 169)

There can be variation. Barton (2001) explores how, for political reasons, history education in Northern Ireland avoids attention to specific individuals who are associated with particular parties involved in a long and still present tumultuous history:

> Narratives of individual achievements, whether real or fictional, are much less common than in the United States … [with] an absence of attention to the achievements of famous people in the past—the specific type of narrative that is so common in the United States. (pp. 900, 902)

This common narrative structure leads students to reductively signify collectives such as institutions, nations, and racial groups to representative individuals (Barton & Levstik, 1998; Levstik, 2000; Peck, Poyntz, & Seixas, 2011).

In addition to singularizing such collectives, many students give nations a human capacity for self-improvement. Barton and Levstik (1998) found that middle school students struggle with complexities of past beliefs and actions given "their concern with establishing the United States [as] a country in which historical hardships and injustices are corrected and overcome" (p. 487). Epstein (1998) likewise found that European American students in her study "viewed racial oppression as a historic aberration from the nation's progressive legacy, with no particular group or institution culpable for the cause of racial group inequality" (p. 418). More recently, Colley (2015) found similar results working with U.S. high school seniors. When tasked to tell in response to a set of photographs the story of U.S. women's fight for equality over time, participants "struggled" to reconcile "their study of historical agency in the past with their narrative of progress" (p. 128).

Should these findings surprise us? Trouillot (1995) reminds us that school stories are "a particular bundle of silences" (p. 27) created by "the uneven contribution of competing groups and individuals who have unequal access to the means for such production" (p. xix); see also Apple (1986) and Popkewitz (1998). Despite this, we have convincing evidence from Epstein (1998) that some African American students nonetheless speak powerfully from within, despite official silences expressing very different views regarding official narratives with their concomitant agents and exemplars of social change. In her study, African American students ranked the trustworthiness of textbooks (and likely by extension any teaching that relies on such a resource) lower than the histories told to them by family and associates in their communities. This differed significantly from European American students in her study, who ranked the textbook as a reliable source of historical information first and ahead in trustworthiness of histories told by family and friends. In a related finding, iconic individuals were not absent in African American student accounts. In their explanations, however, these students offered a far more nuanced appreciation for the social movements and collective nature of African American struggle and change over time than their European American counterparts.

For many, beliefs about agency, change, and the "grand narratives" of the progressively improving Anglo-settler countries are deeply engrained through the common school stories we tell of our nations and their evolution through time, along with related imaginings of what constitutes the good citizen and the good life (den Heyer & Abbott, 2011; Richardson, 2002; Stanley, 2006; VanSledright, 2008). Trouillot's (1995) "bundle of silences," however, requires a more explicit attempt to offer more than a statuesque account of the nation, agency, and change. To do so, we must overcome the lack of research into the ways members

of traditionally ignored groups in school history account for agency and change, such as those offered by women, workers, and African Americans, and the particular stories offered by North American Indigenous communities of Turtle Island. With that necessary caveat, I turn my attention to examine the "strains of culture" in which privileged and "implicit theories of agency" gain "their prominence and prevalence in the public representations of society" (Morris, Menon, & Ames, 2001, pp. 170, 176).

We encounter the "grand narratives" shaping mainstream interpretations about agency, from the daily news to the refined air of scholarship. Young people are quite capable to discern which cultural cues are given social prominence (as in those tested, for example). Many students likely expect, therefore, and in some ways demand from their teachers, a familiar "lovely knowledge" story containing a plotline in which things are always getting better and populated with iconic leaders to explain this progressive change through time (Pitt & Britzman, 2003).

One example of this demand for a particular kind of story reveals itself in an observed unit by Marv, a 12-year Canadian social studies teacher (den Heyer, 2012). Marv explicitly organized a grade 11 unit on agency and social change with guiding questions given to students on the first day such as "what is social change?" and "how does it happen?" As detailed in the classroom transcript, Marv quickly uncovered common explanations for agency and social change from his students:

> Then our other group talked about well, "How does it happen?" Who or how can we make change occur?" Again, some interesting answers. For the most part, your answers indicated that, the belief of the class, that people who we might call "extraordinary" or people in the public eye or people who are motivated for a particular reason are the ones who make change happen. So I started to try and think about this a little bit last night. I thought about whether we think somebody already has to be famous to help motivate change or whether it is their job in making things change that makes them famous. (den Heyer, 2012, p. 313)

In that same study, the pedagogical pressure (or, perhaps more accurately, that which occurs in the pressured time of schooling) to make human agency more an assumption rather than a question was revealed by Terry, a 26-year award-winning high school social studies teacher. The unit I observed Terry instruct was on Quebec's Quiet Revolution, a period of time during the late 1950–1960s in which broad and significant political, cultural, and educational changes occurred. In one-on-one interviews, Terry conveyed to me an impressive scholarly knowledge of the local and global agents influencing provincial politics and culture at this time. I expected him, therefore, to lead a complex student analysis of this most significant period for the province. Instead, he organized his unit around the challenges faced and choices made by an iconic leader, then Canadian Prime Minister Pierre. E. Trudeau. I asked Terry after one class why he organized his unit primarily around Trudeau: "Simplicity, clear narrative, access points for the students. But, do we simplify too much? That is the question" (den Heyer, 2012, p. 310).

While pedagogical access points matter, so too does not oversimplifying the intersubjective complexities involved in how we learn to evaluate options, make choices, and take actions. Fred Weinstein (1995) succinctly summarizes several "intractable problems" at the core of historical scholarship and questions of agency, empathy, and change lost with oversimplification. These include the heterogeneity of populations, raising questions about how individuals and populations are connected; the discontinuities in people's beliefs and perceptions as they re-evaluate expectations and the objects and goals around which desires coalesce; and "the capacity of people to actively construct versions of the world ... in the context of many different social locations they occupy" (Weinstein, 1995, p. 299).

Such problems when explicitly investigated potentially aid the sophistication of students' historical explanations and reflection on their own variegated capacities in the many zones of influence they travel through on a daily basis. They do so by providing students with questions that might spur a need to wrestle with the complexities of human subjectivity, the difficulties of historical explanation for change over time, and the diversities elided in the ways we learn to name the world.

Historical Lineage

These findings about most students' reasoning about agency and change, reflected in the model identified by Markus and Kitayama, have impressive lineage. Philosophers generally recognize Immanuel Kant's (1724–1804) writing on moral agency as the foremost articulation associated with early European scholarly interpretations of the modern subject. Kant's theorizing of the sovereign self arose contemporaneously with the rise of sovereign secular nation-states in Europe. G. W. F. Hegel (1770–1831) in *Philosophy of History* glorified European nation-states themselves as the agency through which his "Spirit of History" expresses itself (Willinsky, 1998).

Kant and Hegel wrote in a time of great European change: The continental rise of the bourgeoisie, newly emerging secular states increasingly free of Roman religious orthodoxy, and overseas contact and colonization all threatened the cognitive and affective identifications of people to place and traditional ruling elites. Their scholarly concern lay in what to make of this change from subject to citizen and with the need for social cohesion through a newly articulated moral grounding and purpose for the nation. In each case, the legitimacy and interaction of the modern citizen and state was premised upon their sovereignty in intention and law. Accordingly, the future of both the citizen and the state was already self-contained, or "bounded within," and it was in reference to their quasi-religious teleological purposes that the agency of each could be best explained.

The moves of poststructuralist, feminist, and versions of critical hermeneutic and phenomenological theories in late 20th- and early 21st-century conditions of cultural and national fragmentation make such premises less stable. Scholars engaged in these conversations attempt to dress any presumption of a universal and autonomous agent in the specificities of social bodies and places and with

the palimpsest of intentions, desires, and meanings (Johnson, 2003). Who is this "self" that "legislates" (the literal meaning of the Greek *auto-nomous*), a self presumed to preoriginate social relations and cultural enunciations as some haunting "I" before the "am"?

For example, Bourdieu (1972/1977, 1979/1984) extends Marx's analysis detailing the ways in which different social classes reproduce within their members' particular dispositions (or ideals of such) to operate and be conversant within a particular cultural "habitus." Touraine (1977, 1981) addresses the role of social movements in recalibrating individual-social identities and purposes, what becomes either acceptable practice or not (e.g., smoking indoors, drinking and driving, gay marriage). Research on agency in this vein extends across disciplines and boundaries, from Russian social psychology (Wertsch, 2005) to international sociology (Ermakoff, 2010; Johnson, 2003).

So, too, has Hegel's spirit become ghastly. Animated by the 20th century's horrors of war and genocide, this scholarship attends to the diversities in national communities elided by Hegel's work to materialize the Spirit of History in the state personified by those occupying its offices. To exorcise this historical teleology of the citizen and nation, scholars in the humanities and social sciences have theorized agency's complexities in a range of questions related to the politics of education (Schutz, 2000). The story this research seeks to tell is of the necessity to change the declarative "I" (am) into the question, "am 'I'?"

My Story: A Search for Agency

What we choose to research tells something about what we feel we might lack. Growing up in rural Nova Scotia, I was taught the Canadian "grand narrative" history. This is a story in which "women, Aboriginal people, and immigrants are secondary characters in young people's story of Quebec" and other provinces too, as research shows (Létourneau, 2006, p. 74; see also Clark, 2005; den Heyer & Abbott, 2011; Richardson, 2002; VanSledright, 2008). This story in Canada moves from east to west along with the so-named "settlers" and railways as it tells of those transformative decisions by the nation's alleged fathers.

While we students no doubt absorbed this storyline of the great men as agential leaders, many Nova Scotians were more concerned with "The Man" whose decisions made far away affected a region with a precarious economic life. The lesson about agency I took away is that history is something that happens to ordinary people, not something that they make. After several degrees and teaching assignments, in the mid-1990s I earned a Masters at Ontario Institute for Studies in Education/University of Toronto. There I had the great fortune to learn from Dr. Roger I. Simon.

For Simon, the historical subject was not the past per say but a set of present and future possibilities that might be revealed through an encounter with the limitations of our institutionally shaped historical frames of reception. What might we become if invited to write and invest as acts of agency in the marginalia of those grand-narrative scripts through which we've learned to act appropriately in places of remembrance (e.g., manifested in heritage monumentalization in schools, museums,

public memorials; see also Farley, 2009; Mishra Tarc, 2015)? This experience led me to the question of whether agency is something all have as they enact their daily thoughts and routines, or whether we should reserve the term for when people interrupt routine inherited scripts. Then again, when do we not in our daily lives interrupt or have interrupting thoughts that challenge our routines?

From Professor Simon I learned that identifications and commonplace templates of storytelling contain within their very subjective expression fragment, fracture, and palimpsest. Without subjectivity as the primary historical text and subject, students' eyes more likely glaze over rather than wrinkle with insight. Simon left me with a different understanding as to what education potentially can offer—less a question of learning history to be a responsible or good or productive citizen and more about becoming a (better) human being through engagements with the past as a "difficult gift" (Simon, 2005).

After three more years of high school social studies teaching, I started a PhD at the University of British Columbia, supervised by Dr. Peter Seixas. Seixas drew from the work of the British historical-thinking scholars, particularly Lee (1983), Ashby and Lee (1987), and Shemilt (1980). These educators used second-order concepts to research students' historical thinking and theorized the ways in which second-order historical concepts might better inform British history education. Sharing similarities and differences with other lists (Lee, 1983), Seixas's list of second-order concepts at that time included significance, epistemology and evidence, continuity and change, progress and decline, empathy and moral judgement, and historical agency. Lee's list in his 1983 publication, for example, consisted of evidence, cause, change, time, and empathy. Like empathy, Seixas's use of agency is concerned with the fact "that people in the past faced choices, that they made decisions, and that the resulting actions had consequences" (Seixas, 1993, p. 303). Here is the hinge, insufficiently identified in that literature (and one I will return to detail later): Agency or empathy is not just about what those in the past thought about their circumstances and their perceived choices, but crucially it also about making explicit the question of how such informs our own present interpretations of what we today have to face and the choices needed to do so.

Illich (1989) captures this latter concern for the counsel that history can provide those in the present:

> People [need] to understand how immensely distant the mental world is in which the 12th century authors moved. I then try to keep [students] there for a while, becoming aware how much they are strangers, how little they can use their own concepts, their own modern German or English or French words *and* prepare them to re-enter the modern world *with a crucial question about it. And at that moment of re-entry, to become aware, for a moment, what a different universe they enter when they enter their own certainties, the world in which they feel at home.* (p. 15; emphasis added)

For Illich, doing history requires a question of import for the present or a concern raised through an encounter with ourselves as the historical subject for which we seek some counsel in further historical study (for distinctions between the subject as encounter versus thing to acquire, see den Heyer, 2009).

With the publishing of *Teaching about Historical Thinking* and "The Big 6" historical concepts (Denos & Case, 2006), historical agency was dismissed from Canadian historical second-order concept service. Agency was replaced first with "moral judgement" (Denos & Case, 2006) and then with history's "ethical dimension": "What responsibilities do historical crimes and sacrifices impose upon us today? These questions are one part of the ethical dimension of history. Another part has to do with the ethical judgments we make about historical action" (The Historical Thinking Project, n.d). Interested readers should contact the authors for their reasoning behind this move. Perhaps these authors recognized the inherent complexity of historical agency lucidly described by Barton (2012):

> Agency is complex because relationships among all these factors are complex; individuals, groups, institutions, ideas and other forces interact in multiple, overlapping and even contradictory ways, and understanding historical events requires taking all of them into account. This is asking a lot, particularly for young people who are just beginning to encounter the systematic study of history. (p. 140)

I agree fully with Barton's outline of this complexity, but question why the complex too often gets sacrificed for "simplicity" (to use the word of schoolteacher Terry from above)? To give up on the one concept that invites teachers and students to consider the historical basis of our subjective and socially entwined intentions, perceived choices, and actions is to give up what is potentially "educational" about history education (Biesta, 2010; den Heyer, 2015).

Recent Definitions of Agency Used in History Education Research

Agency might indeed be "the stock-in-trade of history—identifying main characters, describing their actions, and trying to explain why events played out as they did" (Barton, 2012, p. 2). Agency therefore intersects with questions of causation, social continuity and change, and empathy, our attempt to share "states of mind" with historical others to discern why they might have done that for which we have a historical account (Collingwood, 1946; Mazlish, 1963). To approximate a sense of historical empathy, however, requires some stance about agency, as recent definitions of the concept suggest.

Bandura (2001) offers a rich and influential examination of agency based on our capacities to reflect, imagine, and change course in acting toward desired goals:

> People set goals for themselves, anticipate the likely consequences of prospective actions, and select and create courses of action likely to produce desired outcomes and avoid detrimental ones … [B]y being represented cognitively in the present, foreseeable future events are converted into current motivators and regulators of behaviour. (p. 7)

This personal agency is also supplemented by what Bandura names as "proxy" and "collective" agency. The former is utilized when we need a representative to exert our will and choice on our behalf (e.g., a politician) and the latter when we band together to work for a common goal (e.g., unions).

Colley (2015) adopts Bandura's work and defines historical agency as "the actions of an individual or groups of individuals in the past (actors) who chose to act (actions) in the context of structures, limitations, and constraints, while facing the intended and/or unintended consequences of their actions" (p. 118). To tease out components of agency, Colley identifies "5 C's" of agency: choice, concept, category, context, and consequence (p. 23–24). The "concept" of agency can aid students' reflection on past action and present agential possibilities, while "category" refers to a range of individual, collective, and institutional expressions of agency.

Clark and Camicia (2014) borrow Damico, Baildon, and Greenstone's (2010) definition of historical agency to examine preservice teachers' engagement with graphic novels as a means to foster understandings of agency:

> The relationship between structural forces that shape historical events and the ways people influence and shape, are affected by these events. That is, human beings are autonomous agents with abilities to affect change, yet there are social structures that constrain and limit what individuals can do. (Damico et al., 2010, p. 2)

Clark and Camicia's (2014) study examines the ways ethics intersects with preservice teachers' understandings of the constraints encountered by historical characters in graphic novels. In a noteworthy twist, their research protocols also asked participants to rewrite parts of the characters' actions within the graphic novels. This, they write, sparked educative discussion about the ways structures provide individuals with both limits and affordances.

Definitions shared above represent well those deployed in history education research, and I note the prominence in these definitions of the notion of individual autonomy. The intersecting concepts of change and of empathy, however, require that educators move beyond merely contrasting autonomy with what is taken to be unquestionably commonsensical (*doxa*) at the time of those with whom we seek to empathize. If we accept that we need to empathically appreciate the historical *doxa* influencing people's choices at a given historical time, are we not then questioning how autonomous individual agents actually are? If so, we must better attend to the educational question of ontology, the theory of beings or entities and their relations.

Agency's Shape and Content

The question of agency—of how people are influenced and influential within social life—constitutes a crucial disciplinary concern for history and social studies (den Heyer, 2003, 2012; Lee, 1983; Seixas, 1993; 1996). Yet, perhaps because of the complex conundrum as Barton (2012) noted, historians (like many history educators) seem to prefer to get on with the "task of assigning causes to events" rather than explicitly question the ways people affect change or what motivates people to do so (Pomper, 1996, p. 281–282).

As a concept, agency involves two distinct but related ontological dimensions: one concerns our beliefs about being human among others (shape) and the other concerns our explanations for human behavior (content). Canadian historian Ian McKay makes a germane observation in regards to agency's shape. McKay (2000) calls for historians to attend to the historical emergence of a "liberal order: as one that encourages and seeks to extend across time and space a belief in the epistemological and ontological primacy of the 'individual'" (p. 623). Here, and as identified by Markus and Kitayama (2002), the individual as a self-directing being constitutes the primary unit or category for interpreting the shape of human intentions, choices, and actions.

The content of agency speaks to a related concern regarding how we account for influences on agents' intentions, perceived choices, and the intended and unintended consequences of the actions they undertook. Taking up McKay's call, Sandwell (2003) further notes that a "liberal order" story proceeds with a particular understanding of what motivates people: "the notion that all people sought to maximize comparative net advantage – that is, that the motive of gain was the mainspring of human behaviour … and that unregulated competition brought maximum human progress" (Reddy, cited in Sandwell, 2003, p. 427). Citing several Canadian historical studies to convincingly make her case, Sandwell (2003) cautions against attributing a contemporary liberal order of understanding to those in the past:

> [It] gives us little help in understanding the vast majority of people [in the historical record] who made decisions in apparent opposition to their self-interest, who worked outside of formal economies, or who seemed oblivious to the issues of individual justice or equality. (p. 450)

In each of these dimensions of agency we are dealing with a set of ontological presumptions about human related-ness (shape) and explanations for particular human behavior (content).

Such ontological beliefs are notable in comments made by Karen, a grade-11 student and participant in a study conducted by Seixas (1993): "I think each group or each individual leader they might have an idea to improve their society … but I think because humans[s] are selfish, it leads to a negative [result]" (p. 319). This is a crucial ontological claim—involving both shape (groups or leaders) and content (humans are selfish)—out of which questions about epistemology should follow (e.g., Why do you believe this about humans? Are there any counter-examples and arguments?). In this way, agency is the key concept to inform us about our own lives by raising the often tacit ontological beliefs we bring both to the historical record and to the contemporary challenges we seek to understand.

Historiographical Work on Agency's Shape and Content

The status of the individual as an autonomous agent and how best to account for our and others' intentions, choices, and actions is a thread-worn debate. We can find a representative example of such disagreements between rational

choice theorists and those with a more sociological approach to explain the human situation (e.g., Bourdieu, 1977). Their disagreements are nicely satirized here:

> One (side) says, 'Everything depends on the individual', the other, 'Everything depends on society'. The first group says: 'But it is always particular individuals who decide to do this and not that'. The others reply: 'But their decisions are socially conditioned'. The first group says: 'But what you call "social conditioning" only comes about because others want to do something and do it'. The others reply: 'But what these others want to do and do is also socially conditioned' (Elias, cited in Wertsch, 2005, p. 147)

We need not go to one or another extreme. Ermakoff (2010), for example, uses both the storied agent preferred by rational choice theorists and the embedded storied agent operating within a "habitus" to examine the shift in matrimonial norms and practices that occurred in Western Europe in the Middle Ages. Given the preponderance in our research of the "American middle class model" of the agent, I think it appropriate to follow Ermakoff's example and for research and pedagogy to consider a diverse range of interpretations regarding agency's shape and content.

As McAfee (2000) notes, "The more we recognize our indebtedness to and relationship with the others in our midst, the more likely we are to have effective political agency, practice, and communities" (p. 16). Agency is the concept that allows us to question this historical and contemporary "indebtedness" to "others in our midst" by considering the multiple zones of influence shaping particular intentions, choices, and actions.

As Jane Bennett (2007) observes, we can think about the shape of agency quite differently as "a force distributed across multiple, overlapping bodies, disseminated in degrees—rather than the capacity of a unitary subject of consciousness" (p. 134). If this is a reasonable assertion then "those privileged markers of agency—autonomy, intentionality, rationality, and so on—are off the mark" (Bennett, 2007, p. 134). This distributed agent is the starting assumption of scholars associated with the "new materialism" school of social science, an increasingly influential story about the materiality of thought and the thoughtfulness of materiality (see Karen Barad (2007), for example). In historiographical scholarship, Bennett's (2007) observation is given substance through the work of Elizabeth Ermarth, Miguel Cabrera, and Alain Touraine.

For Ermarth (2001), the coordinates of agency's shape lie between cultural communities and artistic and scientific innovations. These innovations give rise to new representational models or metaphors conveyed through popular art, academic disciplines, political arguments, and advertisements (e.g., the clock as cosmos, railway as history and progress, computer or internet as mind and consciousness). She argues that the work of Lyotard, Saussure, Einstein, and Picasso punctured Enlightenment beliefs about a unified rational individual who may be objectively read through an assumed transparent medium of language:

> "[T]he individual" agent of modernity exists for and makes possible the "objectivity" that we have taken for granted, thanks to our familiarity with representational conventions first in art, then in science, then in political systems. (Ermarth, 2001, p. 37)

Changing representational models become metaphors that enable people to invoke differing frames of reference to make sense *of* the world that contribute to the possibility of new demands and actions *in* the world.

While sharing a similar orientation to that of Ermarth as to the shape of agency, Cabrera's (2001) key distinction is between objective discursive "concepts" and subjective personal "meanings." Concepts provide pre-existing resources for people to "perceive and make sense of social reality" (Cabrera, 2001, p. 87). Crucially, concepts conveyed in discourses exist prior to people's sense-making activity. It is the meanings that people make with these conceptual resources that are

> subjective entities in the sense that subjects are aware of their existence and manage them at will in the course of their social interactions.... The modern discursive concepts of liberty, equality, individual, citizenship, or class are one thing ... if people can aspire to be free and equal and if they feel like rational individuals or citizens with rights or identify themselves as class, it is because the respective concepts previously existed and were applied to social life. (Cabrera, 2001, p. 87)

As Gary Shaw (2013) notes, discourse is playing the role of structure here,

> of *discours*, **not** *parole*, and that this structural limit is not in any simple or direct sense controlled by the individual actor.... It is worth stressing the ways in which Cabrera goes beyond the postmodern rhetorical prejudices. He is in the first place quite unashamed to speak of individuals, but they must be understood as historically constructed subjects and it is the latter not the individual as natural kind, as barebones, that are the actors. (p. 7; emphasis in original)

For Cabrera (2004), discursive categories provide an "imaginary" through which individuals "make a diagnosis of their place in the world and thus acquire the set of beliefs, intentions, feelings, passions, aspirations, hopes" that motivate and/or "justify or confer sense on their actions" (pp. 97–98). While a discourse as agent might for many seem odd given our propensity to accent individual autonomy, evidence for such lies in research I reviewed earlier about how students account for agency and change. How else to make sense of how studied populations so often express the reasoning about agency and change identified as the American middle class/grand narrative discourse of the liberal agent?

Touraine (1981, 1995) offers another interpretation of how best to think about the shape of agency in contrast to Ermarth's emphasis on artistic and scientific models and Cabrera's on the link between objective discourse and subjective meaning making. Unlike these scholars, for Touraine "social groups" constitute

the prime category of analysis. Agency is a capacity of groups formed around specific social struggles over particular practices of their society (e.g., smoking, drunk driving, deficit reduction rather than full employment policies). To explain agency and change requires that we attend to the struggles by social groups over the stories that make objective conditions roughly intelligible as experiences that then animate individual motivations and actions. These struggles are over "historicity"—the way members of a society understand, evaluate, and reproduce that society through "*symbolic representations of experience*," economic investments, and "*cultural legitimization* of their self-generating activity" (Touraine, 1981, p. 59; emphasis in original). Touraine's notion of "historicity" constitutes his challenge to a sociological black box tradition in which the warrants for explaining social actions are sought in non-social explanations (e.g., the nature of societies, inevitabilities of class dynamics). Taken together, these scholars offer a broader set of interpretations for agency's shape than found in the history education research. In doing so, they expand how we might interpret the shape of agency and related questions about causation and empathy in both historical and contemporary examples of social change.

Agency's Content

Giddens (1984) writes that assumptions about people's motivations are themselves historical inheritances that require fresh engagement: "For, like Marxism, we are still prisoners of the Victorian era in so far as we look first of all to the transformation of the material world as the generic motive force of human history" (p. 259). While many popular contemporary historians likely run fast away from any Marxist association, there are similarities between that and a liberal order's emphasis on material motivations to best explain agency's content. In addition to Sandwell's work referenced above, Jay Smith (2001) and Timothy Tackett (1996) offer some nuance to these assertions.

Smith (2001) contests an emphasis in "traditional history" on "experience" and on "revisionist or linguistic explanations" that appeal to "discourse." Rather, for Smith the content of agency is found in people's need to reconcile different positions expressed in social disagreements or conflicts so as to establish or reestablish a general moral sense and particular view of the world. Smith (2001) develops his argument through his critique of Tackett's (1996) popular historical work on the French Revolution. Smith challenges Tackett's use of two kinds of experience to explain the 1789 revolt by the Third Estate, "social formation" experience and that of "immediate sensory perception" (Smith, 2001, p. 122).

Tackett is a historian of the French Revolution and builds his thesis from this event. Tackett's (1996) thesis that "experience" motivates the action of people is popular in contemporary scholarship across disciplines: People exist in social locations. Experiences associated with social locations impart underlying attitudes, values, jealousies, desires, or ways of thinking which constitute an ethos activated by appropriate stimuli to cause action. He finds that Third Estate revolutionary agency in France emerged from a "posture toward the noble deputies [that] reflected not so much an intellectual position" but "an instinctive and visceral antipathy" brought to

surface by the deliberative process encountered in the debates of the Estates General (Tackett, 1996, p. 308). This deliberative process served to "crystallize and intensify social antagonisms, making many deputies far more self-conscious of those antagonisms than ever before" (Tackett, 1996, p. 308). However, Smith (2001) argues that Tackett's assertions rely on a passive interpretation of agency:

> The key to uncovering the connection between consciousness and agency lies not in the analysis of experience per se, but in the processes of interpretation that inevitably intersect the phenomena one regards as the subject's experience. To go where the action is, and to find the motors that drive historical change, the historian needs to dissect the interpretive disposition. (p. 126)

To adequately begin to interpret social changes requires that we attend to "the composition and decomposition of the interpretive dispositions that inevitably frame historical agency" (p. 141).

These scholars exemplify that the way in which we cast agents and agency depends upon which aspects of social life (shape) and motivations or intentions or driving forces (content) we emphasize: an inherent pregnancy of language and metaphor to spawn new social articulations (Ermarth); the collisions of "discourses" through which a society and its members are cast in social dramas (Cabrera); the struggles by social groups over the ideas, images, and terms that people use to interpret and express their personal experiences and social commitments (Touraine); shifting political contexts that challenge people's "interpretive dispositions" (Smith); and sociocultural experiences that shape people's motivations and choices (Tackett). While fluid, the distinction between shape and content provides a means to address agency's two equally necessary dimensions that require more research and classroom attention.

This scholarship about agency's shape and content provides a practical tool for pedagogy and research. For example, I used this work to teach a high school class, guide classroom observations, and interview four experienced high school social studies teachers about their teaching and thinking about agency and change (den Heyer, 2012). As with Gidden's observation, my participants accounted for the content of agency (with varying degrees of emphasis) with appeals to material motivations and those born of socioeconomic experiences. A tension existed, however, concerning how best to reconcile such motivations and experiences with the motivational force in people's action of ideals and their existential challenges.

Relating to the shape of agency, participants struggled to relate the relative roles played by leaders, discourses and ideals, and social movements. This study revealed agency's complexity in the ways Barton (2012) and Weinstein (1995) noted. This complexity, however, is also the concept's strength that is crucial to explore in school contexts, which, too seldom, support student engagement with such wealth of knowledge. An example of this from my interview and classroom observations of Jane, a teacher of 34 years:

> Jane pauses after reading my summation of Cabrera to reflect on the role played by individual leadership in her own thinking and teaching, and

> then says, "The Quiet Revolution is about awareness. But I attributed the awareness to the leaders of the revolution. And I don't know why, but I do" (Interview #3). As she reads through Touraine and Cabrera, new insights begin to emerge. (den Heyer, 2012, p. 309)

Clark and Camicia (2014) also detail encounters with preservice teachers asked to engage with questions of agency through graphic novels:

> The effectiveness of this activity … was not only evident in [their] work, but it was also evident in the fruitful discussions that took place in the next class period. The discussion went beyond simply considering the frames that pre-service teachers created, and their own agency in creating them. As a whole class, we engaged in more complex discussions about what actions count as agency, or how much agency people actually had in certain historical situations? (p. 11)

While complex, agency need not be inaccessible. A range of innovative research seeks to engage not just what researchers can say about the concept but also with its vital importance as a pedagogical tool "requisite to any in depth attention to controversial issues, past or present" (Colley, 2015, p. 143).

Identity and Subjectivity

We need to address more explicitly the question of agency and the traffic between material and symbolic structure on the one hand and people's perceived choices and available actions on the other. Supplementing research reviewed on agency's shape and content is the question of identity and subjectivity. Identity and subjectivity are entwined but distinct. I understand identities to be those categories of social markers that place and make us recognizable within a shared symbolic social world. While identities might be how the world reads us, subjectivity is how we learn to read the world.

Feminist work provides insight into agency's subjective realm along with questions about historical causation and change. Joan Scott (2001) asserts that "identities don't pre-exist their strategic political invocation" (p. 285). While applicable to the continual identity struggles over what it might mean to be feminist, Canadian, American, or Indigenous in North America, Scott explores how the identity of "women" as a group with rights to participate in political places "was not so much a self-evident fact of history as it was evidence—from particular and discrete moments in time—of someone's, of some group's efforts to identify and thereby mobilize a collectivity" (p. 287). Scott examines the political status of "women" who seek to disrupt the policing of language and politics regarding where "a woman" may appear (and thereby, of course, disrupt the legitimacy of places where only men may appear). To disrupt and reconfigure social arrangements, groups advocate for new identities or re-appropriate those already existing and ground such historically by invoking historical lineage. They do so, Scott asserts, to demonstrate the contingency in the present of where women and men may legitimately appear and the material investments that sustain such.

The scholarship of Kobena Mercer offers another example of this struggle over social identity and, therefore, possible subjective readings. Mercer (2000) describes British activism to rearticulate and reconstitute social and political positioning:

> The shift from "ethnic minority" to "black" [during the 1980s] registered in the language of political discourse, demonstrated a process in which the objects of racist ideology reconstituted themselves as subjects of social, cultural and political change, actively making history, albeit under circumstances not of their own choosing.... The rearticulation of black as a political rather than racial category ... thus created a new form of symbolic unity out of the significations of racial difference. (p. 510)

Mercer demonstrates the distributed condition of historical agency and entwinements between identities and subjectivities. As with Scott's theorizing of feminist historians' work, nothing less is at stake than the sense-making activities of future citizens as antiracist activists and feminists and those they influence.

The changed framing of feminists as "angry" or "man haters" provides a recent example of this historical struggle over the images and ideals that become the content of any particular individual's subjective reading of the world. Colley's (2015) study with senior high school students and their reaction to the "feminist" label, as well as other research she cites in support, provides a case in point:

> Participants also struggled making sense of their argument that the historical actors in the photographs were feminists who were fighting for equality, and their larger understandings of the stereotypical negative definitions of feminist. Levstik & Groth (2002) found that eighth grade students were confused over the term *feminist* and they identified their hesitancy as stemming from associations with homosexuality, men hating, and gender role expectations. Similarly, Monaghan (2014) found that pre-service teachers described feminists as "crazy, annoying, polarizing, radical, lesbian, man-haters" (p. 9). Participants in this study reflected similar sentiments as they said they saw it as a "negative word," "not for men," or that it has a "negative connotation." (p. 136)

Note here the ways in which struggles over identity—feminists as "man-haters"—inform students' subjective "negative" reading of what "feminists" are. If "identities don't pre-exist their strategic political invocation" (Scott, 2001, p. 285), we must also recognize the crucial importance of the images (distributed through historical agency) that get attached to some but not other identities making them more and less palatable ways for individuals to subjectively read the world.

A Model of Individual and Historical Agency

To this point, I have reviewed a range of scholarship we might take up to better engage questions about agency's shape, beliefs about being human among others, and, its content, the intentions and motivations we use to explain historical

action. I also have provided examples of the ways social struggles over identities can change subjective readings of the world. I now offer a model of agency to account for this traffic between the agency expressed in struggles by groups and agency as a subjective individual capacity.

According to the sociologists Emirbayer and Mische (1998), agency at both the individual level and the group level involves three moments nested together, or a "triad of chords" heard simultaneously, if not always harmoniously, in people's motivations, perceived choices, and actions. Agency involves the active interpretation of experience (the chord of "iteration"), the application of lessons to present socially interpreted situations (the chord of "evaluation"), and, where an unsatisfactory explanatory occurs, the projection of ways to reestablish epistemological and ethical coherence (the chord of "projectivity"). For example, if asked where I would like to go for a vacation, I call upon my past (the chord of "iteration") to "evaluate" the present options in light of the future probable and preferable outcomes (the chord of "projectivity"). In fact, I can only clarify my present "evaluation" of options and my preferable projected outcome—where to go or what to do—by attending to each of these moments. In addition to my own evaluation of my past vacation experiences, this projectivity is also informed by popularly distributed images of vacation options: naughty in Las Vegas or a pampered beach escape in an impoverished nation? As I move from one to the other chord, or imagine them concurrently, overlapping, the value of one or another vacation option becomes clearer in light of my also emerging preferred vacation.

We also play these chords or spectral moments when we deliberate with others over an explicitly political question. For example, we cannot evaluate a present issue of social concern without also thinking concurrently about a past we can reference (or, rather, we "reiterate" our historical knowledge about such) in light of "projected" possible and preferable futures. In this way, the historicized past informs the present as a set of choices evaluated and possible future actions projected. This imaginative act, however, is not simply bounded within individuals. Individuals rely upon collective conceptual resources in their sense-making activities. Akin to the content of Touraine's historicity, Schutz (1932/1967) calls these storied images, ideals, and ideas a society's "stocks of knowledge."

I once saw a cartoon that illustrates this point. Three people sit at three desks in an office. The first person on the left thinks, "The vibrations are overwhelming. Two white people are afraid of a smart, aggressive African American!" The second person, sitting in the center, thinks, "I'm sick of their patronizing, macho glances. They can't stand a woman in a responsible position!" The third person, on the right, thinks, "I can see it in their eyes. They don't like me because I'm gay!" Three individuals each identify as a member of a group that has been historically disadvantaged and use that membership to interpret a present social situation. They reiterate terms to evaluate their present situation so as to guide a projected course of future oriented action (options they may take, for example, to resolve their discomfort). They identify themselves as an African American, woman, or gay; terms that likely did not exist either as positive personal identifications or potential subjective political positions for their grandmothers and grandfathers. What changed between then and now?

In what ways did such definitions of identity and subjective interpretations of social situations as illustrated in the cartoon become available?

Resonant with feminist and antiracist work and that of Cabrera (2001, 2004), Touraine (1977, 1981) argues that the very images and meanings of "society," "individual," "agency," and "change" are facts of "historicity" that emerge from debates over the legitimacy of disciplinary practices and from the veracity of stories and images available for individuals to explain social relations, that trace trajectories from past to future, and that animate actions toward worthy social goals and personal and professional practices. Based on this scholarship, I define *historical agency* as a transpersonal capacity expressed by groups in struggles over the conceptual resources that individuals use to interpret social and material life (e.g., stories that convey interpretations of worthy personal and social goals, terms that define identities, representations of iconic role models and agents, disciplinary interpretations).

Linking my definition of historical agency to agency on a personal level connects social and personal histories. As the cartoon along with the antiracist and feminist work of Mercer and Scott illustrate, it does so by linking social struggles to the "stocks of knowledge" people have at hand to make subjective sense of their lives (Schutz, 1932/1967; see Figure 9.1).

I use "historical" rather than collective or social capacity for two reasons. First, the historical denotes my concern with history instruction. In examining social change, teachers and students look back in historically rendered time. Second, the stakes in social struggles concern what will constitute the "historical" with the legitimacy and cache assigned such status (Scott, 2001; Touraine, 1981).

A final key point here needs emphasis. As with identities and subjectivity, there is no one-to-one transfer between historical and individual agency. People are far too disjointed or, alternatively, complex for such a simple formulation. To make this point, I borrow an analogy for agency's unpredictability: "The emergent

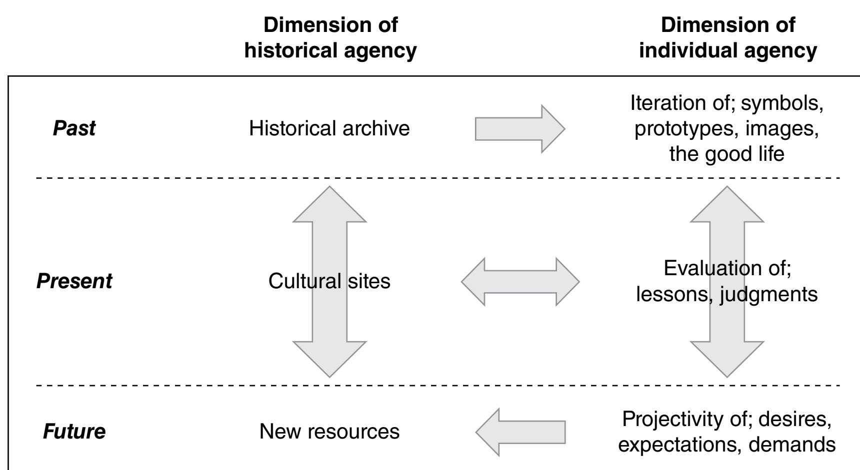

Figure 9.1 Dimensions of historical-individual agency, depicting the relationship between the archived and storied past, interpreted present, and projected future.

properties of water, such as fluidity, viscosity, and transparency, are not simply the aggregate properties of its microcomponents of oxygen and hydrogen. Through their interactive effects they are transformed into new phenomena" (Bunge, cited in Bandura, 2001, p. 4).

Discussion: Agency Through Historical Perspective

I return to the beginning of this piece and the storied nature of the ways we think about agency as a capacity and agency as a causation of change within nation-states. The research indicates that a particular "liberal order" conveyed through oft repeated "grand narratives" of the nation-states' allegedly aspirational intents shapes the historical thinking of many studied populations. Many appeal to iconic leaders to explain change, reinforcing somewhat limited and abstract ideals of individual autonomy. Less considered are different stories that might challenge our assumptions about autonomy by raising questions about the differing shapes and content of agency.

However, not all people think within that storied structure. All we might be able to say convincingly is that many White middle-class students in schools and universities can articulate such reasoning in ways they have been taught—or at least they can express such logics within the confines of the schools where most research takes place. Context is important, shaping likely responses and therefore what we may conclude about any studied idea.

I want to end by addressing a question, I think, of import. If, as King (2003) states, we are nothing but stories, what might a historical education look like that would draw off a range of stories and storytelling templates so that we might approximate the complexity of historical and contemporary life? How might we, in other words, become more than a single national story we have been taught we are?

Reflecting individual-historical agency and the "stocks of knowledge" that are their content, Jörn Rüsen (1989) defines historical consciousness as "an operation of human intellection rendering present actuality intelligible while fashioning its future perspective" (p. 39). Such "rendering" takes place through "narrative competence"— the ability to derive moral obligations in the present from inherited stories from or about the past (p. 41). He offers a typology of narrative competence ranging from the simple acceptance of the narrative ("traditional") to the historicizing of narratives themselves ("genetic").

With "genetic" competence people recognize that possible meanings expressed in historical narratives spring from specific temporal and spatial contexts while they are also able to discern possible lessons from these stories to aid evaluations of present and future courses of action. As with Emirbayer and Mische (1998) discussed earlier, we can note the iterative, evaluative, and projective elements of historical consciousness expressed in Rüsen's notion of narrative competence. These scholars inform potential ways we might take up historical agency, storytelling, and ethics both in our teaching and in our research. For this, we need to rethink historical perspective as both a present and a political lens rather than only as a past and cultural frame that others had.

The field of history education predominantly confines issues of perspective to the past: Students should try to understand the contexts in which those in the past operated so as to come to a reasoned judgment about their intentions and actions. This requires that we take on a person's or people's perspective. In this way, perspective taking has been linked to empathy—an understanding of the individual conditions and social situations in which historical others operated. Barton and Levstik (2004) prefer the term "perspective recognition," as "perspective accords well with intuitive notions about the complex elements of individual viewpoints" (p. 207). Epstein (1998), however, offers another way to think about historical perspective:

> By "historical perspectives," I mean the assumptions, knowledge, and values that shape historians' and others' judgments about the meaning and significance of historical actors, events, institutions, and processes. The perspectives or frames of reference of historians influence every aspect of historical inquiry, from the specific questions of the past that historians pursue to the historical interpretation they construct to explain past events or processes (Cronon 1992; Holt, 1990).... E. H. Carr (1961) noted that the material conditions and sociopolitical ideologies of contemporary societies profoundly shape historians' interpretations of past societies. (p. 398)

In one sense, history is of course about the past. Educators focus on past events to develop skills or historical competencies. Equally, as Epstein reminds us, history is also about what one or another group decides is significant about the past for us all to learn in public school: significant because you do not pass the test without having sufficiently represented that perspective to make the grade.

Historical perspective, then, is not only about the past but just as much about a selection of only those aspects of the past that serve or agree with some group's present historical perspective—itself a frame consisting of "sociopolitical ideologies of contemporary societies" (Epstein, 1998, p. 398). It remains an unasked but necessary question for scholars who make careers advocating for historical thinking skills why this one does not make the cut as a historical skill for students to develop: What present political historical perspective shapes the history you are taught in schools and beyond? The educative possibility of studying historical perspective and agency might involve putting a bit more of the social, philosophical, and political into our historical studies.

As a value-laden reading, we might identify a historical perspective theoretically (e.g., neoliberal, Marxist, feminist) or as emerging from a position of concern having to do with ethnicity, gender, class, or any other position (or combination of positions) from or for which someone presumes to speak or write. Whatever the case, a historical perspective is a political lens that endows events with meaning and significance by linking several or more together to create a story (den Heyer & Abbott, 2011). As the political or cultural currency of an identity group wanes, the historical perspectives its members articulated as stories of agency may also wane or change or even be re-appropriated in new forms by emergent groups as resources for future individuals to make sense of themselves (Mercer, 2000; Trouillot, 1995).

To take up historical perspective as that which shapes the doing of history in schools (and beyond) raises questions about the interests, investments, and inherent limitations of our cultural archive contained in textbooks, memorials, movies, and that found in our own teaching practices. Yet, K-16 classrooms can often be places where teachers avoid the discomfort of questions for which we do not already have ready-made answers. This is especially so when we refuse to acknowledge or, worse, cannot even name a historical perspective defining the content and tests to which we are expected to teach, let alone our own pedagogical commitments along with the silences in such. Where this be the case, I contend that history education is, profoundly, ahistorical.

Yes, stories are wondrous things. And they are dangerous—especially when curricula, students, and teachers seem to have only one story to tell as if it were the past itself. We might be wise in this regard to bear in mind a principle of toxicology: There is nothing without poisonous qualities, it is the dose that makes the poison.

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10

Global and World History Education

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This chapter focuses on global and world history education, although these terms are not necessarily synonymous. Scholars, curricular designers, and teachers have at times used the terms *global history* and *world history* interchangeably, while at other times they have been used to signify different content orientations and pedagogical approaches. Currently, there is no consensus in the fields of history or history education. For example, on the H-World discussion board (Barnes, 2015) several historians debated the differences between the terms, and others questioned whether such distinctions matter. Some scholars (e.g., Bain & Shreiner, 2005; Dunn, 2000a; Marino & Bolgatz, 2010; Zong, Wilson, & Quashiga, 2008) have wondered whether U.S. school courses labeled "world history" (the most popular term for non-national history courses) have been *global* enough. Whereas world history in a school context tends to be a catchall term to describe non-national history, the use of the term global often signifies more representation from different regions (outside of the West) and connections between regions. In the scholarly field, however, the distinctions are less clear. Writing in the inaugural issue of the *Journal of World History*, editor Jerry Bentley (1990) titled his first essay "A New Forum for Global History." Writing 16 years later, Clarence-Smith, Pomeranz, and Vries (2006) argued in the first editorial for the *Journal of Global History* that examinations of the processes of globalization are what differentiate global history from world history.

For the purpose of this chapter, we are less interested in attempting to distinguish between global history and world history than in examining the literature that focuses on the organization of and teaching and learning in courses that include content that primarily attempts to transcend separate civilizations, nations, or regions. In particular, we are interested in how world history (hereafter used to include subject areas and courses titled world or global history) is currently conceived of and taught in countries around the world. We realized early in our research that to capture what is going on in classrooms we needed to

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expand the literature beyond empirical and curriculum research to include theoretical essays, reports, and literature written by practitioners. Thus, to engage in this study, we reviewed literature published in English related to world or global history curriculum, teaching, and learning from the time period of 2000 to 2015. We focused primarily on studies focused on K-12 schools, although at times we included studies of college world history courses.

Much has been written about the rise of world history both as a field and as a course in the United States in the 20th century (for example, see Allardyce, 1990; Dunn, 2000b; Favretti, 2007; Manning, 2003; McNeill, 1995; Stuchtey & Fuchs, 2003). Although we do not focus on that history in this review, the attention paid by some U.S. historians both to the scholarly field of world history and to the school subject throughout the 20th century laid the groundwork for the subsequent studies reviewed here and perhaps explains why the majority of studies that we found are written about the U.S. context. In what follows we discuss current research trends, organized by salient categories for examining the world history education literature.

Eurocentrism in World History Curriculum and Classrooms

One of the main trends that we found across research studies in different countries is persistent Eurocentrism in history curriculum that may hinder a global approach to history. Stearns (2010) noted that the biggest debate in the US is one of geographic focus, particularly "concerning world versus European (or more generally, civilizational) history" (p. 51). Several studies pointed out Eurocentrism in courses labeled world history through examinations of standards (Bain & Shreiner, 2005; Dunn, 2000a; Marino & Bolgatz, 2010; Mead, 2006; Noboa, 2012) or textbooks (Bolgatz & Marino, 2014; Kim, Moon, & Joo, 2013; Marino, 2011a). For example, in their analysis of 23 U.S. state standards, Marino and Bolgatz (2010) found that, with two exceptions, states conceptualized world history through a Western rather than global lens, particularly before 1945 (they examined standards for the time period after 1500). The authors (Bolgatz & Marino, 2014) also found that non-Advanced Placement (AP) world history textbooks in the US used European periodization schemes and chronologies, whereas AP texts tended to include more of a global orientation.

Zooming in on the case of Texas, Noboa (2012) found that the world history state standards minimized or distorted non-European parts of the world, including Mexico and Latin America where many Texan students have heritage connections (see also Barker, 2011). In some cases Eurocentrism is combined with nationalism or regionalism in world history texts or curriculum to present a partial view of the global tableau. For example, Kang (2003) noted that South Korean textbooks at the time of the study focused on Eurocentrism as well as Sinocentrism, which influenced the "conceptualization of world history by visualizing Europe and China as the two principal centers of cultural creation and diffusion" (p. 217). In China the world history course has a strong presence in universities and high schools; however, the term world history denotes any history of the outside

world, which often includes regional histories (Sachsenmaier, 2011). Sachsenmaier (2011) also noted that the regional expertise of most of the Chinese "world historians" is the West; Eurocentrism, he contended, has been "woven deeply into the fabrics of China's intellectual worlds" (p. 227). New movements to develop Chinese forms of world history, which Sachsenmaier noted are nationally grounded, are directed against this Eurocentrism.

Mead's (2006) review of U.S. world history standards, interestingly, includes both accusations of Eurocentrism in some standards and "kitchen sink-ism"—efforts to include every culture—in others (p. 6). Mead recommended that states that received low scores rebuild their world history standards to emulate the states that received "A" scores and the AP World History Standards, which he called "excellent," but he did not offer advice for how to avoid Eurocentrism (or kitchen sink-ism). Other authors have provided more of a roadmap; for example, Watt (2012) contended:

> Good world history does not simply add the "non-West" or "Third World" as an appendage to Europe or Western civilization; it actually explores and explains the encounters as well as the dialogue, relations, interconnectivities, and interdependence between the West and other societies in the modern era—and in the preceding centuries and millennia. (p. 218)

Rabb (2009), too, encouraged global connections and including details about individual cultures as a way of moving away from a Western model. In the current AP curriculum framework (College Board, 2016), teachers are encouraged to "provide a balanced coverage of the regions within the course, and they should ensure that Europe is not situated at the center of the historical narrative and student inquiry in the classroom" (p. 107). The AP course limits coverage of European history to 20% of the course content (p. 34).

We found a few studies that moved beyond curriculum analysis to discuss how teachers or students viewed Eurocentrism in world history courses. Nygren's (2011c) discussion of Swedish students' preference for world history over regional history pointed to a long tradition in Sweden of using UNESCO standards to globalize the history curriculum (see also Nygren, 2011b). Despite the introduction of the Council of Europe's more Eurocentric curriculum in the 1990s, Nygren (2011c) wrote that students tended to maintain a global orientation. National context may have played a role:

> Another contributing factor for Swedish students preferring world history—despite greater stress on European history—may be that Sweden is a small country in a, relatively-speaking, small part of the world. It is a small and officially neutral, alliance-free country between East and West, with an often prominent international profile in questions of peace, anti-racism and development in poor countries. (p. 50)

Teachers may recognize Eurocentrism but not know how to avoid it. Mangram and Watson (2011) studied three teachers in the US who taught either global history or global education courses and found that

> while the teachers understood that they were immersed in a U.S./Western culture, they had little understanding of how ideological forces or discourse formations continued to shape their thinking and assumptions about the world. Indeed, the teachers talked about embracing multiple perspectives, [but] at times their words and actions, once closely examined, belied their sentiments. (p. 111)

Purposeful instruction, however, can allow teachers and students to counter Eurocentrism if that is the goal. Bain's (2006) study of his own classroom found that students viewed a textbook description of the Black Death as Eurocentric after first analyzing primary sources from different regions. Carton and Manning (2006)'s study of U.S. and Australian university students in online world history courses found that "where American and Australian students converged was in their understanding of Eurocentric presuppositions and the idea of 'discovery' not as a single act but as a series of events that were anchored in a wider world context." (para 28).

Not all scholars contend that Eurocentrism should be totally avoided. German scholar Fuchs (2001) called for "soft Eurocentrism of world history historiography" that is conscious of its foundations but is open to new perspectives (p. 256). Maxwell (2012) distinguished between two types of Eurocentrism that can be in world history courses:

> A "Eurocentric" course may be "Europe-centered," devoting disproportionate attention to the European continent at the expense of other world regions. Secondly, a "Eurocentric" course may promote a certain problematic interpretation of world history that downplays European racism, violence, and injustice; exaggerates European achievements while overlooking those of non-European societies; justifies European imperialism as "progress".... For clarity's sake, I refer to this second meaning of "Eurocentrism" as "Europhile triumphalism." (para. 14)

Maxwell, a self-proclaimed regionalist, sees greater harm coming from the second type of Eurocentrism.

Some authors have offered explanations for Eurocentrism in world history. In the US, for example, Eurocentrism can come from the use of Western civilization periodization schemes for world history courses (Marino, 2011a, 2011b; Rabb, 2009). Popp (2006) discussed two reasons in the German context:

> Some of the German historians—like Hans-Ulrich Wehler—fear that if history education in German schools is too much concerned with non-European topics, it could lead to German history teachers neglecting their most important task: to tell the young Germans about Nazism and the Holocaust and to foster a feeling of the continual responsibility of German society resulting from this period of German history. Above all, there are many specialists who do not know much about the new concepts of world history, but nevertheless do not approve "world history" as such, because in their view it is in general nothing but "speculative philosophy," lacking

> any disciplinary standards, or a Euro-centric "imperialistic claim," or an encyclopaedic collection of vast numbers of data and facts. (para 2)

Additionally, because of the relative youth of the field, there is a lack of adequately trained world history teachers at the K-12 or university levels (Popp, 2006; Maxwell, 2012). In certain countries teachers may have more experience with Western history than non-Western history. Teachers also need both to have knowledge of different cultures and civilizations and to be able to make connections across time and space (Harris, 2014; Rabb, 2009). Marino (2011b) sees teacher educators as potentially helpful in preparing teachers to develop non-Eurocentric chronologies; however, we were not able to find studies that detailed how that preparation might work in teacher education programs.

World History for Identity Formation

Studies that involve discussion of identity in world history education tend to fall into two categories: (1) those that focus on how students' individual or group identities are developed or challenged in world history courses and (2) those that examine why world history should or should not be taught given the perceived identity of a particular nation. The first category of research is smaller, reflecting our larger finding that there are few world history studies focused on students and classrooms. However, authors such as Levy (2015), Stearns (2000b), Saada (2013), and Grever, Pelzer, and Haydn (2011) shed light on how students might make sense of world history given their diverse identities. For example, Levy's (2015) study of high school students and their parents in a California world history course who identified as "Chinese" found that both groups felt strongly that a topic such as the Cultural Revolution should be included in a world history course not only to connect to Chinese students' identities but also for the benefit of all students. As one parent commented, "everyone should know so … we can learn from the mistake" (p. 14). The parents also referenced increased student engagement due to identity connection by commenting how students came home during instruction on the Cultural Revolution and talked much more with their parents about this history topic than they normally did. Heritage or cultural background does not always determine how students will relate to world history content, however. Stearns (2000b) found that his university students (even those from non-Western backgrounds) tended to identify Western events and phenomena in significance activities more than events from other areas of the world. For example, most of the students in his world history course, including 27 identified Buddhists, diminished the significance of Buddhism when discussing it and Christianity in world history.

Saada's (2013) study of four teachers in two private Islamic schools in Michigan found that they faced a dilemma of balancing students' national and transnational identities. Additionally, many of the students' parents had emigrated from Islamic and Middle Eastern countries, and students sometimes came to classes with critiques of U.S. foreign policy that the teachers struggled to reconcile. Kang (2003) wrote that some South Korean scholars see the world history course as a

place where students can develop an East Asian identity. This would require a move away from Eurocentic and Sinocentric world history curriculum that was prevalent at the time. Grever et al.'s (2011) survey of 678 Dutch, English, and French students in multicultural high schools confirmed that these students do not see themselves in solely national terms; instead, "their interest in the past lies mainly in areas such as family, religious, and trans-national history" (p. 207). These studies point to the differing and often competing student identities that teachers need to address in world history classrooms. Among myriad influences, identities can be shaped by parents, peers, family histories, and geography. Because of the nature of world history content, these identities are often brought to the forefront as teachers discuss different historical time periods and regions. This is certainly an area where more research can be done to see how students, teachers, and parents manage and embrace different identities and world history content.

The second area of research concerning national identity and world history tends to include studies where textbooks and curricula are the objects for analysis. Textbook studies often reinforce the prominence of the nation-state as the dominant organizing frame in modern world history texts (see Foster, 2011). For example, LaSpina (2003) argued against the current national frames through which indigenous histories are presented, instead suggesting a global frame: "When compared in a global context, indigenous history, past and present, works as a counter-text that undercuts the dominant myth of progress, troubling the symbolic coherence of this narrative and the imagined unity of national identity" (p. 667). Textbook studies across nations also emphasize the hegemony of the Western narrative. In a study of South Korean textbooks, Kim, Moon, and Joo (2013) found that, despite attempts in South Korea to challenge Eurocentric narratives, three world history textbooks reproduced ideas of Western cultural imperialism (within the two eras studied) with the "West as Subject of history and the East as Other" (p. 240).

On the other hand, Foster and Nicholls (2005) found stark differences in how World War II was portrayed in U.S., Japanese, and European textbooks, suggesting that "textbook representations appear to be influenced by nationalistic bias, differing cultural and geopolitical perspectives, and the sociopolitical agendas of contemporary societies" (p. 214). Each of the countries' textbooks emphasized the role of that country in the war while deemphasizing the other countries, thus leading to conflicting narratives. Similarly, Suh, Yurita, Lin, and Metzger's (2013) study of World War II in Chinese, Japanese, and South Korean textbooks found that each of the textbooks "offered strongly singular national narratives in which official history is reinforced, academic history is carefully employed as a selective evidentiary support, and popular history is incorporated only so far as it illustrates the national story" (p. 49). The authors contended that, in these countries with centralized curricula, the textbooks became a mediated space where the state tries to shape what is learned in schools through a master narrative that "constructs a vision of historical justice … in which contemporary society is absolved of the past" (p. 49). Suh, Yurita, and Metzger (2008) found in their study of the portrayal of the Korean War in U.S., South Korean, and Japanese textbooks that although there were differences in how each nation portrayed the war, none

of the textbooks seemed to reflect "globally oriented ... scholarly questions" in presenting the war (p. 69). In all of the textbooks Suh and her colleagues examined in these two studies, history was presented as finite and not something for students to puzzle over or question.

Carretero (2014) used a particular image commonly found in textbooks—Theodor de Bry's 1594 *Columbus Landing on Hispaniola*—to show the contrast between textbooks from Spain where texts omit the subjugation of indigenous people and the enslaved and those from Mexico where they do not. Carretero found that the captions of the image (Natives "made offerings of gold" in the Spanish text, and in the Mexican "one of the reasons was to collect gold through the conquest of Indians") highlighted the larger areas of focus of each of the texts (p. 72; see also Carretero, Jacott, & López-Manjón, 2002). Carretero (2014) also studied how students in Argentina, Chile, and Spain reacted to the image and found that a higher number of Spanish students saw violence (as opposed to a peaceful exchange) in the image, perhaps indicating that public criticism of Spanish colonization since the Fifth Centenary in 1992 has "transformed the traditional representation of the Eurocentric point of view about the event" (p. 74).

Wineburg, Barron, and Larsson (2007) designed an exploratory intervention that would counter the national perspectives on world history in different countries. Students in the US and Sweden examined events of World War II using textbooks from both countries. Pre/post survey results showed that after the intervention most students from both countries still chose their own textbook as the most accurate; however, students started to see the role of geography and politics in creating historical narratives. Students also commented that they enjoyed learning other perspectives. Collaborations such as this are rare but may be one way to raise more student awareness about how textbooks represent the past and also present political situations around the world.

World History for Global Awareness and Citizenship

We found some scholarship, particularly by U.S. scholars, that links world history to the global education literature and movement, although not always explicitly. Global education generally includes the rationale of preparing students for the "increasing interconnectedness among peoples and nations that characterizes the world today" (Zong, Wilson, & Quashiga, 2008, p. 199). The world history course is sometimes mentioned in global education literature as a space where these goals can be achieved. Gaudelli (2011) referred to world history as part of a larger "world curricula." His research in world history and other classrooms has found that students were generally positive about learning about the world but that teachers' instruction ranged from "trivial pursuit pedagogy and textbook domination" (p. 43) to more interactive classes that nonetheless had a "diversity day" approach to the world (p. 51). Like other global education researchers, Gaudelli did not seem satisfied with how *global* the world history courses were. He also suggested that teachers need to be able to make more global connections. Likewise, Merryfield, Lo, Po, and Kasai (2008) stressed the importance of teachers seeing and helping students make global connections

across time and space (see also Harris, 2014). These skills make up what the authors describe as *worldmindedness*.

Merryfield (2007) found that Internet resources could provide *globally minded* world history teachers with resources to teach global connections. For example, Merryfield described how one teacher's search for visuals for her world history class led to her make global connections through architecture:

> As she compiled images from the web she was struck by how these cultural universals demonstrate similarities across diverse cultures over hundreds of years. Her thinking about what she had perceived originally as differences changed to an appreciation of how people across cultures share many assumptions about buildings and walls. She also noted how ideas about building were constantly shaped and reshaped by cross-cultural interaction and conflict. (Merryfield, 2007, p. 266)

Alleman, Knighton, and Brophy (2007) also advocated the use of cultural universals with elementary students to encourage a connected knowledge of political, economic, and social systems across space and over time.

Whereas Merryfield saw great potential in Internet resources for teaching about the world, the teachers in her study did prefer large U.S. and British websites over websites from other countries, potentially limiting the teachers' exposure to different parts of the world. Teachers in the study also worried about the use of websites from the Middle East because of the controversy surrounding the War in Iraq at the time. As Merryfield (2007) queried, since large U.S. websites have considerable influence on teachers and students, "are they a transformative force in global education?" (p. 272). An awareness of Western hegemony and how to counteract it might be needed for teachers to encourage global citizenship in their classes. Mangram and Watson (2011) found that one of the teachers in their study was able to come to such awareness: "Debbie articulates an understanding that Western power and values often overshadow one's understanding of other perspectives and that being able to recognize that different perspectives and values exist creates more well-rounded global citizens" (p. 106).

Global citizenship has become a goal not only for students but also for the general public and organizations (see Girard & Harris, 2013). As some studies have pointed out (e.g., Diskant, 2010; Girard & Harris, 2013; Myers, 2015), the world history course could be a good curricular space for development of global citizenship competencies. However, Myers (2015) offered that "despite the potential of world history for helping students develop a cosmopolitan worldview, we have to remind ourselves that it is not an automatic outcome" (para. 2). In Myers' (2015) study of three world history teachers who attempted to build global citizenship in world history through discussion, he found that students were able to reconcile their nationalistic identities with a sense of global awareness. Myers leaves the readers with three recommendations: "prepare for risky discussions," "make it about your students," and "challenge student beliefs and interpretive frameworks." Girard and Harris (2013) argued that world history courses would be particularly good spaces to have students focus on the global interconnections, multiple perspectives, and inquiry

aspects of global citizenship, as it is those conceptual spaces in which the disciplinary methods of world history dovetail with the goals of global education.

Burack (2003) has argued against linking global education and global citizenship education to world history courses. Drawing on John Fonte's argument for the essentiality of national constitutionalism to citizenship rights, Burack cautioned that limiting focus on the West (as in the U.S. AP standards) could "accelerate harmful trends in the teaching of world history by promoting the global education ideology" (p. 42). Burack instead recommended that world history should "stress the continuing centrality of the West" and "include other cultures, but honestly—warts and all, East and West" (p. 65).

World History for Chronological Understanding

Some of the work in world history education, particularly in England, has focused on how students can gain chronological understanding through world history content, or at least history content that spans multiple time periods, which often leads to examining different geographic regions. Hawkey (2015) cited the most recent English curriculum standards as sparking a movement toward the use of Fernand Bruadel's *longue durée* framework to help students "shift scales" in examining concepts such as civilization or empire over time. However, Hawkey argued, teachers in England are not keeping pace with this movement. Additionally, as we found with many other countries, England remains tied to national history (Hawkey, 2014).

Hawkey (2014, 2015) has argued that the "big history" frameworks used in the US might be useful to help students "scale hop" and grapple with big issues such as climate change:

> I suggest that in history classrooms an engagement with historical issues which have an impact on lives today, and which are likely to stretch into the future, are very much what teachers need to attend to in developing students' historical perspective. (2015, p. 41)

The big history movement began as college courses and published works (e.g., Christian, 1991; Spier, 1996) in the US and the Netherlands in the 1990s. Hughes-Warrington's (2005) historiography of the origins of big history noted that for a small but growing number of historians "history must tell the biggest story of all, that of the origins and evolution of human beings, life, the earth, and the universe—hence, 'big history'" (p. 8). Thus, in big history the chronology of world history is greatly expanded by billions of years. Through the establishment of the Big History Project (www.bighistoryproject.com), big history has recently spread to high schools in the US and around the world, although empirical studies of the project have not yet been published. It remains to be seen how this emerging course will look in different parts of the world as well as how it will connect to existing world history courses. Already some are questioning goals and structure of the course in the popular press (see Edwards, 2014, and Sam Wineburg's comments in Sorkin, 2014).

There are scholars from England who study what they term *big picture history*. Howson (2009) described the movement (different than big history mentioned above) as an attempt to explore history and the chronological process through much larger units of time (see also Nuttall, 2013; Shemilt, 2000). According to Shemilt (2000), "it is necessary, in addition [to chronologies of national history], for pupils to acquire a basic chronology that embraces the whole of the past and is represented in terms of significant phases of human history" (p. 94).

Bain (2011) contended that the "levels problem"—having students understand and connect different levels of time and space—is the biggest challenge to teaching and learning world history. The scholars from England and teachers who have studied how students understand chronology and levels of time have suggested supplying students with temporal schemes or "frameworks of knowledge" (Shemilt, 2009) that would allow them to understand causation and change over time. For example, Shemilt (2009) presented a framework where students would examine how people spent their time, ate, and lived 60,000 years ago, 15,000 years ago, 7,000 years ago, 150 years ago, and today (pp. 162–163). Despite more attention in England being paid to broadening the history curriculum through temporal scales, research in this area is in preliminary stages (Howson, 2009; Shemilt, 2009). It should also be noted that this research is taking place within courses focusing mainly on national history; however, by taking a more expansive temporal view, regional or national courses may inherently align to some degree with world history methods and goals.

World History's Tools and Habits of Mind

In addition to paying attention to chronologies and scales in world history, research has focused on other world historical habits of mind as an attempt to determine what might be most salient to teaching and learning world history. In Harris's (2012) study of world historians writing in the *Journal of World History*, she found that historians framed their studies using particular conceptual devices: "(a) using multiple periodization schemes; (b) employing multiple geographic and conceptual units of analysis (case studies, contact and exchange, comparison, interregional patterns, global patterns); and (c) incorporating disciplinary methods and concepts outside of history" (p. 322). What made the articles *world historical*, Harris (2012) concluded, was "their focus on, or connection to, large interregional or global patterns of change over time" (p. 329). Harris recommended that teachers could use these conceptual devices to guide course and lesson development and offered recommendations for doing so. As we will discuss below, the original AP World History curriculum guide also listed world history habits of mind, including seeing global patterns across time and space and comparing societies and regions. Similarly, Olstein (2015) envisioned four *thinking strategies* to gain global perspectives: comparing, connecting, conceptualizing, and contextualizing.

Some research has examined how teachers and students take up one or more of these habits of mind. Stearns (2000a) teamed up with a cognitive psychologist to examine how he could help his university students understand comparison in

world history. He found that he needed to incorporate more scaffolded assignments earlier in the semester. He also focused on change over time, which he saw as a form of comparison as it allowed students to examine continuities and changes across time and space. Interestingly, Rabb (2009) cautioned against too much comparison in world history: "If points of contact, parallels, and similarities become the main focus of attention, how are students to gain familiarity with, and respect for, the outlook of civilizations different from their own?" (p. 14). Instead he proposed that both global connections and individual details of cultures need the most attention in world history. To Manning (2003), connections are at the heart of world history; he defined the field as "focusing on the historical connections among entities and systems often thought to be distinct" (p. 7).

Harris (2014) examined how practicing and preservice teachers made connections in conceptualizing world history and planning for instruction. She found that participants who made *event-to-event* connections (as opposed to others such as *event-to-category*) focused more on the historical context and included causal and comparative explanations and connections to global patterns. Encouraging teachers to make these types of connections is one thing that researchers and teacher educators need to think more about, but there is also the issue of how to get students to make connections with world history content. As one of the experienced teachers in Harris's (2014) study noted about her students:

> What they have a harder time with in general, I think, are the connections between the different events, and how one event impacts another, or what the implications are of those events. A kid could tell you that Bantus migrated all throughout Africa … but not be able to make that next step, about the impact that that has on the spread of culture throughout Africa. (p. 361)

This is challenging work even for the best intentioned. In their case study of one world history teacher, Girard and Harris (2012) found that despite the teacher's creation of a tool that would help students make global connections, the students did not transfer the information to their essays, and they needed even more help than anticipated by the teacher.

Bain's (2006) description of his work with ninth-grade world history students provides insight into the intellectual work of world history teaching and learning and common tools present in the world history classroom. Central to Bain's work here is an effort to make use of the much-maligned standard world history textbook, while at the same time fostering an investigative mindset in his students, which he sees as being true to the work of historians (as opposed to the canned answers that predominate teacher-centered instruction). Troubling his students' notion of the textbook as received authority was Bain's concern, battling against years of such habituation in the classroom, history and others. In short, Bain argued, a new activity structure needed to be created:

> To talk differently to the sources of classroom authority, students must not only appropriate the tools of the discipline but must also disturb

> their conventional interactions with classroom authority, assuming new status, role, and voice in relationship to texts and teachers. (p. 2086)

Bain drew on sociocultural frames for understanding social practices and argued that for students to truly take up and practice with the disciplinary tools of history, the very nature of classroom interactions between teacher, students, and text needed to be transformed. Bain denaturalized the authority of the history textbook by empowering students to critique it by developing expertise in the content outside of the book, and also by arming the students with historian's tools for investigation. He argued that

> by using discipline-specific scholarship—in this case, history—teachers can modify these more general cognitive strategies to parallel the "toolkit" that experts in disciplinary fields use to do their work. History teachers and students can construct learning environments that surround students with *supports aligned to the intellectual demands of the enterprise* in which they are engaged. (p. 2103, italics added)

The scholarship attending to tools for teaching world history and the habits of mind that students should acquire depends on teachers being able to foster such learning in their students. Thus far, there have not been any empirical studies that have examined how world history habits of mind do or do not align with a more common frame for examining teacher knowledge: pedagogical content knowledge (PCK). Monte-Sano and Budano (2012) identified what they term *PCK for teaching history*. However, even though they conducted their research with world history teachers, the authors did not examine any distinctions in PCK based on the type of history taught: "Based on existing research, we do not know whether history teachers with different areas of emphasis (e.g., world or U.S.) rely on the same aspects of PCK equally" (p. 178). Monte-Sano and Budano have identified a fertile area for more research.

World History Meets Standards and Accountability

The standards and accountability movement has been perhaps the single biggest shift in U.S. education in recent policy, and a significant thread of research studying this phenomenon has intersected with world history. Standards and accountability practices shape what content is supposed to be taught, and there is conflicting evidence on the degree to which they shape instruction.

Standards

Even within the US, not all states specify standards in world history. Martin, Maldonado, Schneider, and Smith's 2011 study found that 44 of the 50 states had world history standards, and among that subset there was a range of organizational heuristics that shaped the content, with chronological and regional studies predominating. While standards and accountability reforms have been shown to

change the pace of instruction in some instances, the standards also shape what is taught, the vision of the world that students encounter, and the extent to which the students "see themselves" in that history. For example Noboa (2012) found in his review of Texas world history standards that they "minimize or distort the historical and cultural significance of Mexico and Latin America as well as civilizations throughout the Third World" (p. 47), which is particularly troubling in a state with a large Latino/a student population.

Along similar lines, over half of the states' world history standards were given a "poor" rating in relation to their attention to Latin America by the Fordham Foundation's *State of State Standards* report (Mead, 2006). Although now 10 years old, this advocacy foundation's report authored by Mead (2006) gives an overview of standards across the US, with a final tone of condemnation, while excepting a few states viewed as exemplars: California, Georgia, Indiana, Massachusetts, Minnesota, New York, South Carolina, and Virginia. Mead highlighted several features of standards that he viewed as important to serve as a guide for improving the weaker standards. The central issues of concern included too much content but not in areas deemed central, as well as a Eurocentric focus in most states. Furthermore, in part due to the "laundry list" nature of the standards, they lack coherence and easy use by teachers. This last point is particularly salient for history teaching. One of the categories used by Mead was *instructional focus*, which included attention to both *coherence* ("creat[ing] an orderly and logical narrative arc that does not lose itself in minutia or overlook essentials" [p.25]) and *teachability*. This emphasis strikes us as an essential consideration that has not been addressed in the literature: Namely, how can history standards be made more user-friendly and help teachers to tackle the immense challenges of scope and coherence presented by world history? It should be noted that Dunn (2008) critiqued Mead's report, opining that "the report appears to be oblivious to the world history research and methodological debates of the past few decades" (p. 260).

A more recent study by Marino and Bolgatz (2010) analyzing state world history standards in the US found that, even when organized around global themes such as "the first global age," state standards in the US "are driven by and defined through the key events, concepts and themes that would define a [W]estern civilization course" (p. 387). While courses have been relabeled world history instead of Western civilization, the standards have generally not made a similar theoretical and geographical shift. Marino and Bolgatz (2010) highlight New Jersey and Michigan standards as exceptions to the general trend, noting that both states have made strides toward a more global perspective. In particular, they call out Michigan for providing "historical content that illustrates and vitalizes the themes" (p. 386).

Testing and Accountability

The least surprising and perhaps most deleterious impact of accountability testing has been a compounding of issues of coverage in an area that already had trouble introducing students to content across the span of human existence. An illustration of this comes from an investigation into the history and development of standards and testing in Virginia, where a student-teacher reported,

> on Monday I did the Vietnam War, the Korean War, the Chinese Civil war, and Tiananmen Square as well as reviewing Indian Independence, the split of Pakistan and then Bangladesh, Gandhi, and post war Japan. I did all this material in 35 minutes, 5 minutes over the time limit I had been given. Afterwards I was told [by his Clinical Teacher] that I "need to move faster," and that this is "something I need to work on as a teacher." (van Hover, Hicks, Stoddard, & Lisanti, 2010, p. 106)

So while world history teachers already face a challenge of selection and coverage, fact-driven testing exacerbates this further (see also Grant, Derme-Insinna, et al., 2002) by requiring so much that teachers must move at a pace that cannot be considered educationally sound.

Grant and his colleagues (Grant, Derme-Insinna, et al., 2002; Grant, Gradwell, et al., 2002) have done extensive work in examining the impact of U.S. state testing on social studies in general and on world history in particular. In interviewing global history teachers from New York before and after the implementation of a new state exam on global history and geography, they came to several conclusions about the impact of the test. First, the teachers felt the tests a poor measure of learning, where there was insufficient alignment between the assessment and the curriculum. For example, the test was weighted toward the 10th-grade year (world history is taught in grades 9–10), instead of being cumulative, and the document-based question and thematic essay did not include content from both courses. They also questioned the scoring process used and critiqued the test for its lack of testing for depth of understanding (Grant, Gradwell, et al., 2002). Additionally, and perhaps most importantly, the test had a minimal impact on teaching practice, and to the extent it did impact teaching, it was toward rote learning and test preparation through teaching test-taking strategies (Grant, Derme-Insinna, et al., 2002; Grant, Gradwell, et al., 2002; see also van Hover, Hicks & Sayeski, 2012).

Reich (2009, 2013) has examined what history assessments measure about student knowledge, which raises important questions about the nature and structure of any system that seeks to hold teachers and students accountable for world history teaching and learning. By comparing student performance on a set of multiple choice questions used in the New York State's Global History and Geography exam with student interviews and think-alouds, Reich (2009) was able to ascertain a better view of student understanding and its relationship to their performance on the multiple-choice questions. In short, he found that the questions tested three domains: test-wiseness, history content, and literacy skills—but none of the higher-order thinking skills laid out in the state standards the test purported to align with for high-stakes purposes.

DeWitt et al. (2013) undertook an analysis of four state social studies exams, looking both at the cognitive demand of the tests and standards and at the alignment between the tests and their related state standards. The four states, New York, Ohio, Texas, and Virginia, contain 20% of the students in the US between them. While not looking exclusively at world history content, all four state exams contained such content, with Virginia having specific tests for World History and Geography I & II, and New York specifically testing Global History and

Geography, whereas Ohio and Texas have general social studies tests with world history content. They concluded that

> no state, however, aligns its test as a whole with the cognitive level demands of the respective state standards. While each state's testing context is different, our study provides evidence that the result—an overemphasis in testing on lower-order cognitive processes as compared to the standards that students are expected to meet—is consistent across these four states. (p. 398)

So even in states like New York where standards include some robust higher-order thinking standards, those standards are not the focus of the high-stakes exam, with a single document-based question and extended response. The authors found that 70% of the questions on New York's global history and geography test were what they deemed lower-order cognitive demand. This overall trend is disturbing in any subject, but with world history it is perhaps particularly troubling for the focus on discrete content details over larger, complex thinking at the global level. Here is where the accountability regime is particularly problematic, as it further exacerbates the challenge of a breadth of content in world history without requiring students and teachers to operate at a higher level of cognitive demand.

Whither World History?

It was more challenging than we initially anticipated to ascertain how and if world history is taught in different countries. This may be because of a lack of literature or because world history is simply not taught in some areas of the world (and we did not always uncover which). For example, the edited book *After the Wall*: *History Teaching in Europe since 1989* (Roberts, 2004) contains chapters that mention that world history is taught in countries such as Russia, Latvia, Romania, and Lithuania; however, descriptions of the curriculum or world history teaching were not included in the chapters. On the other hand, we found several studies that explicitly highlighted the lack of world history in the history curriculum. Popp (2006) wrote that the "German system does not offer any world history courses to its students—and nobody seems to miss them" (para. 1). Popp suggested changes to this situation, although within the context of the standing national history structure. Fuchs (2006) echoed this conclusion that, despite some reforms and calls for more world history, world history has not made its way into German schools. Poulsen (2013) found essentially no coverage of world history in a study of textbooks in Denmark, Germany, England, and Norway. Commenting on a draft of English history curriculum released in 2013, Hall and Counsell (2013) wrote that the "special way of construing both history and the world that constitutes 'world history' is ignored. No other leading educational jurisdiction ignores world history in this way" (p. 24). They also noted that "British foreign policy is not world history" (p. 24).

There are some exceptions; certainly in the US there has been a growth in world history teaching over the past few decades (Bain & Shreiner, 2005; Cavanagh, 2007). Additionally, we found several studies that reported on countries that have tried to incorporate transnational history into textbooks and curriculum, particularly in Western Europe (e.g., Nicholls, 2006; Nygren, 2011a, 2011b, 2011c). In articles and reports, for example, Nygren (2011a, 2011b, 2011c) has examined Sweden's adoption of UNESCO's curricular standards for international history from the 1950s to the early 2000s. His findings highlight the tensions inherent in introducing world history to replace national or regional history in some way. As Nygren (2011a) wrote about the early implementation of the UNESCO standards: "That history teaching should propagate love for one's country was replaced by an emphasis on objectivity and international perspectives" (p. 342). This was difficult for teachers at the time. As mentioned above, Nygren (2011c) did report that understanding of and interest in world history is growing in Sweden for both teachers and students.

In sum, internationally there is no consistency in the place of world history in the larger history curriculum. Based on available research, it seems that while some countries are embracing world history, others are remaining or trying to become more nationalistic in what history they present to students (see for example chapters in Roberts, 2004). However, Grever et al.'s (2011) survey previously mentioned suggests that, at least in some countries, this may not be what all students want.

Challenges to Improving World History Teaching

While there is a dearth of empirical studies highlighting best practices in the world history classroom, there is plenty of reasoned advice about how the topic should be taught. Several notable books in the past 10 years offer advice for high school or college world history instructors (e.g., Burton, 2012; Roupp, 2010; Singer, 2011; Turk, Dull, Cohen, & Stoll, 2014; Zevin & Gerwin, 2011). The calls for improvement fall into two main areas: ways to improve the *preparation* of world history teachers and suggestions for ways to *approach* the teaching of world history.

Improving the Preparation of World History Teachers

In distilling her experience as a college instructor of world history survey courses, Burton's (2012) experiences provide some guidance for all teachers, including those being prepared to teach world history. In her book *A Primer for Teaching World History: Ten Design Principles*, Burton outlines several key teaching moves that she has found to be essential to the enterprise. More importantly, perhaps, she clearly outlines her goals in teaching world history:

> My conviction [is] that how we do world history is as important as that we do it, if not more so. We should be conscious of our principles, and design our courses, train future teachers, and challenge contemporary students

> accordingly. We ought to be able to name our structural approaches, defend our pedagogical choices, and admit the limits of those choices in the face of all comers, modeling ambition for world history and a humility about its total explanatory power." (p. 9)

Marino (2011b) outlines several steps that teacher educators might take in their approach to preparation of preservice teachers to successfully teach world history. First, he stresses the ways in which college courses can provide students with opportunities to see productive examples through the analysis of model standards and textbooks, both seeing useful global frames and allowing them to contend with the teacher materials that might guide them in light of a deeper academic understanding. Related to this, student teachers should be guided in developing a conceptual focus for world history. Marino pointed to Bulliet et al.'s (2001) college textbook that is organized by theme as an example of the kind of text that could provide a model for student teachers. Finally, Marino argued that students need help breaking away from the dominant "Western Civ" mentality, so teacher educators should both devise non-Eurocentric chronologies and learn to leverage European-focused content for world historical purposes.

Marino (2011b) also noted enduring challenges to the teaching of world history. While it may be easy to identify themes worthy of study, it is more challenging to specify "world historical content that can illustrate and vitalize" (p. 5) those veins of study. The challenge will not recede until

> historical content can be matched to the broad goals and interpretations that define the field. The complexity of those interpretations means that only significant reading and preparation in the field can provide the understandings and factual knowledge necessary to command the content properly. (pp. 5–6)

Most preservice teachers take a broad course of historical study, with a variety of regional foci, that does not necessarily prepare students to think on a global scale or to approach world history in a way that is consistent with the emerging field (Crocco, 2011; Don, 2003; Swansinger, 2009).

Improving Classroom Teaching and Learning

Our focus here was to concentrate on areas of particular concern for the teaching of world history and its unique challenges rather than on general good teaching advice. While it is impossible to completely separate them, we will not be explicitly addressing the general state of the art in terms of teaching and learning but highlighting when a world history-specific iteration is relevant. As Smith-Johnston (2005) has noted, "debates on world history tend to be dominated by issues of *what* content should be *presented* rather than *how* selected content should be *processed* in a classroom" (p. 267, emphasis in the original).

One central element that separates world history as distinct from regional or national histories, quite obviously, is the scope of the material. It seems clear in the literature that the framing of the approach can in turn shape how it is taught.

Consonant with Marino's (2011b) call for a more conceptual approach and Burton's (2012) emphasis on approach over specific content, Smith-Johnston (2005) argued for utilizing three frameworks to structure the teaching and learning of world history: a temporal frame, a spatial frame, and a thematic frame: "Due to the breadth and scope of world history, making content subsidiary to the historical thinking process is essential" (p. 263). Smith-Johnston wants to foreground historical concepts and practices over the particulars, highlighting the structural, or what Schwab (1978) would call syntactic, elements of history. In other words, world history should serve as a course that focuses on historical *thinking.*

One central concern about improving world history that has driven our approach to this review, and that interests us (and, we hope, readers), is what is specific or peculiar to world history instruction compared to other forms of history instruction. Certainly part of the answer to this depends on where one lands in defining world history and its scope and focus, as we discuss above. Before the 2011 revision to the AP World History curricula, the *Course and Exam Description* (College Board, 2010, p. 10) specified what made world history distinctive via five world history-specific habits of mind:

- Seeing global patterns and processes over time and space while connecting local developments to global ones;
- Comparing within and among societies, including comparing societies' reactions to global processes;
- Considering human commonalities and differences;
- Exploring claims of universal standards in relation to culturally diverse ideas;
- Exploring the persistent relevance of world history to contemporary developments.

While we were not able to find any account of why these specifications were removed in latter iterations of the document, their initial inclusion does highlight historical skills that are unique, or at least more prevalent, in world history.

In the 2011 revision, the AP World History *Course and Exam Description* presented world history as distinct from other forms of history and, consonant with other scholarly calls, endorsed world history as a place for a disciplinary approach:

> World history embraces longer time periods, larger geographical areas and much more human history than traditional subdisciplines such as U.S. history and European history. These distinctive challenges posed by world history provide wonderful opportunities to help students understand historiography, the study of the different methods or approaches various historians use to construct .their accounts of the past. (College Board, 2011, p.7)

Here again we see the idea that world history is particularly useful in the teaching about the nature of history, as the reference to historiography highlights (interestingly, the 2016 framework does not include language about the distinctiveness of world history). Other scholarly work has begun to unpack more of these particulars of world history.

Through a content analysis of 18 years of a prominent world history journal, Harris (2012) found a focus on global patterns, no matter what the object of inquiry. She also found that world historians argue for and use multiple, nested units of analysis and shifting temporal and spatial schemes. Harris contended that these conceptual devices, as she termed them, could help world history teachers plan instruction and could be used as a set of heuristics for world history research and writing.

Despite the acknowledgment from some corners (e.g., Smith-Johnston, 2005) that more professional development is required in order to improve world history instruction, one recent study found that only 6.4% of professional development opportunities for social studies teachers focused on world history (Halvorsen, 2013). What is known about what happens in world history classrooms can be distressing for those advocating the approaches above. As part of a recent nationwide survey of social studies teachers in the US, participants were asked to self-report the kinds of instruction they utilized. Using factor analysis, Knowles and Theobald (2013) identified three patterns of instruction across the sample: what they termed *traditional*, which included use of textbooks, lecture, video/film, and worksheets; what they termed *collaborative*, involving the use of group projects, role-playing, and computer-based apps; and finally an approach they termed *research & reflection*, which included the use of maps and primary sources, and essay writing. When looking specifically at world history, they found that the course had the highest use of the traditional approach; interestingly, however, when looking specifically at AP World History, they found the highest incidence of the collaborative and research and reflection approaches. While not proving anything definitively, it does suggest that future research is needed to explore this distinction and to explore what is happening in AP classrooms that might align with the calls for improvement we have reviewed here.

Mead (2006) suggested some structural reforms to improve world history instruction, in addition to his general call for improved standards. First, he called for more time dedicated to world history, suggesting a minimum of three years of exposure across middle and high school levels. More time might alleviate the time crunch, but it may have a result similar to when highways have more lanes: more people drive and, by analogy, teachers will "cover" more content. Second, (and we found no one else advocating this) Mead called for world history to be tested and tied to student advancement (by grade or for graduation). This seems to be a suggestion made in response to the narrowing of the curriculum toward literacy and mathematics as tested subjects. Although perhaps a controversial method, Mead's suggestion speaks to a larger concern that we found in much of the literature: how to increase the presence of world history in the larger school curriculum.

Conclusions and Future Research

Historians have sometimes asked if "world history" is an U.S. or Western construct (Geyer & Bright, 1995), but even in those contexts world history is not universally accepted as a priority. Indeed, some worry about de-emphasizing the centrality of the West, especially in the history of the past 500 years (e.g., Burack,

2003). We found that there are certainly places in the world where schools are teaching courses named world or global history or are looking at ways to expand national histories, either chronologically, spatially, or both. However, *research* on world history education does seem to be most prevalent in the US.

We were rather surprised, despite our knowledge of the field, at the dearth of empirical research in world history classrooms and with world history teachers. This holds true even in the US where there has been rapid growth of world history but not an accompanying uptick in classroom research. We found in our research that even some studies that were set in world history classrooms had their research focus on different elements of instruction or learning than teaching for world history. Thus, based on gaps that we found in the literature, we see three critical areas for future research:

Research on how students and teachers engage in world historical habits of mind: Given the research lacuna on world history teaching, more research is needed that gives insights into how some teachers and researchers are meeting the challenges we found in this review. Case studies or larger surveys of the particular tools world history teachers use and how students take up the habits of mind of world history would be particularly instructive. Possible models include the work of Bain (2000, 2006), Watts and Gimson (2014), and Girard and Harris (2012). The challenge in such analysis is highlighting what is specific to world history instruction, versus the elements that are "just good teaching." No doubt that at times it is irrelevant, yet at others it is a matter of seeing the world history specificity of a particular strategy or practice.

Research on what cases and concepts provide the most leverage for teaching and learning world history: Given that it is impossible to "cover" every possible location and era, world history is an area in which teacher choices are crucial. Because of the potential degrees of freedom world history teachers have, studying how and why they make the content selections they do is worthy of study. This might include looking into teachers' identities, pedagogical content knowledge, interests, and expertise, student backgrounds and identities, and the pedagogical value of particular historical topics. In previous work (Harris & Girard, 2014), we have suggested such choices be driven by *instructional significance*. Nordgren and Johansson's (2015) *conceptual framework for intercultural historical learning* could also provide structure for empirical work on these issues. Such investigations might also answer Marino's (2011b) call for developing cases that illustrate and vitalize world historical themes and content.

Comparative international research on world history teaching and learning: There is a solid base of comparative international studies focused on how particular topics are addressed in world history textbooks (e.g., Carretero, 2014; Foster & Nicholls, 2005; Suh, Yurita, Lin, & Metzger, 2013; Suh, Yurita, & Metzger, 2008). However, there are fewer studies that examine world history teaching and learning through a comparative lens. Wineburg, Barron, and Larsson's (2007) exploratory study of students in the US and Sweden is a promising start, as they had *students* examine the discrepancies in textbook representations in different countries. Additionally, Liu et al.'s (2005) cross-cultural study (12 cultures) of the significance of people and events in world history represents work that has implications for world history curriculum and teaching in many

parts of the world. Moving forward, we would be interested to see more comparative international studies that tackle some of the issues we have cited above (e.g., Eurocentrism and nationalism in the world history curriculum, how students identify with world history topics, creating standards and assessments that support teaching), particularly from the vantage point of the world history classroom. Our central concern in this review is that the field addresses these gaps as soon as possible. They are ripe for exploration.

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Section III

Ideologies, Identities, and Group Experiences in History Education

11

Critical Theory and History Education

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History education informed by critical theory is interested in the relationship among power, knowledge, the ways of knowing underlying history and its education, and the social relations, identities, and subjectivities they help foster. Borrowing from a variety of critical stances, this approach views history and its education not as neutral, objective, depoliticized endeavors but, rather, as socially constructed, ideological enterprises that help foster (and normalize) particular renditions of the world.

Recognizing both history and its education as politically and ideologically constructed enterprises that serve particular interests and perspectives requires asking questions that get to the heart of that construction: What versions and visions of the world do history and its education make possible and intelligible, to whom, how, to what ends, and with what consequences? What understandings and power structures underlie the narratives present in history education? Who is privileged by them, and who is not? Such questions pay attention to how ideology, language, and forms of representation work to construct the world and its people.

Critical scholars, however, don't only question the substance and mechanisms of history and its study; they also challenge existing boundaries between theory and history, between history and historiography, between history and memory, and between in-school and out-of-school learning. A critical approach attempts to diffuse such boundaries in order to examine the complex manner in which history operates in the public imagination, whether at the collective or the individual level, and how the two conflate to produce (or reject) meaning. Indeed, as outlined in this chapter, we believe that some of the more interesting critical scholarship in the area of history/history education has achieved its potency by diffusing the very boundaries noted above, highlighting the constructed nature of history, its politics, and its pedagogical imprint.

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Before getting to that, however, a few comments are necessary to contextualize the terms *history*, *education*, and *critical*. None of those terms render an easy, clear definition in the context of learning about the past, nor through the prism of the theoretical frames invoked in this chapter. History as a discipline has, since the latter part of the 20th century, come under much scrutiny with questions raised about the nature, substance, and boundaries of the field: what history accounts for, what and who counts as history, and who does the "counting." While such questions highlight the ambiguity within the very definition of history as a discipline, the territory of history and its contours become further obscured when it comes to history education within K-12 education. While history is provided its own independent space within the curriculum in some national contexts, in other contexts (e.g., the United States, Canada) it is, by and large, incorporated within social studies, often subsumed by it (see Thornton & Barton, 2010). We note this to highlight that, especially with research emanating from North America, researchers often use the term "social studies" to explore issues of history education. What counts as research on/in history education "proper" and what does not is thus not easily discernible when conducting a literature review. For the purpose of this chapter, we include critical scholarship that centers on (or draws its primary examples from) history education, even when "social studies" rather than "history" is invoked in the title.

What ought to be the purpose of history education and who should—indeed, who has the power to—determine that? Who benefits from current practices in history education, and who does not? Where does education about the past take place? Does it take place in K-12 history classrooms, in homes, in religious and social organizations, through the media, in history museums and memorials? In other words, what history education do we desire and what is its geography? Each question points not only to the murky territory of what constitutes an education in history but also to where and when it takes place. In this chapter, we include literature that explores history education in its broad sense—that which happens in schools as well as in the realm of public pedagogy (Sandlin & Schultz, 2009): in museums, memorials, and other places of memory.

Like most things, what constitutes *critical* is in the eyes of the beholder. There are many beholders in the field, and most, if asked, would probably claim to be doing some form of critical work that involves critical thinking or a measure of critiquing and challenging convention. While you will find much of that excellent work discussed elsewhere in this volume, we define the contours of this chapter more specifically. Our use of the term *critical* invokes education or scholarship that uses the lenses of postmodernism, poststructuralism, postcolonialism, third-wave feminism, race-based theories, psychoanalytic theories, and critical pedagogy[1] to challenge assumptions in history education by examining how knowledge, knowing, and subjectivities are produced through particular curricular and pedagogical practices and their relations to power, discourse, and identity. We recognize that any definition—ours included—is, by its very nature, exclusionary, even with the rather broad definition we use here.

Two additional points regarding the above theoretical frames: (1) none is easily defined or monolithic (there are, in fact, multiple forms to each and, thus, they should probably best be termed in the plural); (2) they diverge and often conflict

in several aspects. For example, critical pedagogy and some forms of feminism, postcolonialism, and race-based theories are utopian, seeing education as a means to dismantle oppressive hegemonic power relations and foster change toward a world that is more democratic, equitable, and just (see DeLeon, 2006; DeLeon & Ross, 2010; Kincheloe, 2001, 2008). Postmodernism and poststructuralism, on the other hand, at least in their purest forms, are not necessarily intent on "fixing" the world but on deconstructing it, exposing its mechanisms and their consequences. These differences could (and often do) become significant within the educative process, helping determine varying oppositional purposes, directions, and contours for what constitutes education. Still, and despite those differences, they all, in some ways, share several common understandings that guide our chapter. Those include challenging Enlightenment narratives and their claims to universality, transparency, objectivity, and truth, as well as examining how issues of power and discourse and the knowledge and knowing they sanction often help foster White, middle-class, masculine, and heteronormative understandings.

The literature reviewed for this chapter includes primarily scholarship from the English-speaking world, specifically that from the US, Canada, and Australia. We draw on this scholarship not only because of our own knowledge of the field and the various searches conducted but also because these are the sites where much of the critical work in/on history education has been generated. To ensure our chapter incorporates current literature in the field, we confine our review to the last decade while still including, when appropriate, some older scholarship seminal to the review. With that in mind, we begin by providing more substance regarding the theoretical stances to/about history education underlying this chapter and what they entail for history education.

Critical History/History Education: An Overview

As part of the critical and reflexive turns of late 20th century and the crises of representation and legitimation generated by them, a number of historiographers, intellectual historians, and philosophers of history have drawn on postmodern, poststructural, and feminist theories to challenge the assumptions and procedures underlying the discipline of history and the historical representations produced by it. Questioning many of history's taken-for-granted practices and disputing foundational notions of universality, truth, reality, and objectivity, scholars such as White (1973, 1978), LaCapra (1985, 2013), Ankersmit (1994, 2001), Scott (1996, 1999), Berkhofer (1995), Ricoeur (2004), and Jenkins (1991), among others, have highlighted the politics embedded in historical methodology and the viewpoint from which history is seen and told. History, they argue, is not a mirror to the past but a positioned, value-laden, discursive inscription that requires exposing its "made up" nature (Berkhofer, 1995; Jenkins, 1991; Scott, 1996; White, 1973, 1978). Always positioned to tell a particular story from a particular time, place, and perspective, historians story the past in ways that promote certain understandings and interpretations over others. Meanings given to the past are never objective or neutral; they are always positioned and

positioning (Jenkins, 1991). As such, claims White (1978), history is simultaneously "a representation that is an interpretation and an interpretation that passes for an explanation" (p. 51).

The critical and reflexive turns occurring in history have also prompted some educators to ask what history education could entail if historical representations are no longer accepted as given but instead are explored as a series of interpretations in need of further interpretations, and where teachers and students scrutinize such representations, along with their accompanying pedagogies, for the ways in which they help legitimate and reinforce particular ideologies, subjectivities, and forms of privilege and subjugation. Such an approach opens up opportunities to force attention not only to what history says about the past but also to what that saying "does" to encourage particular understandings among students about the (and their own) present and future.

This invites teachers and students to critically examine what tends to be perceived as natural and neutral in the production, circulation, and legitimation of a past into history. Addressing history as an interpretative activity invites students to ask how and whose history is told and whose is silenced, as well as why some histories are legitimized while others are forgotten. Exploring these issues allows students to examine how language practices objectify and rationalize reality and "the extent to which those with the political power to 'name the world' come to dominate its meaning" (Knoblauch & Brannon, 1993, p. 23). Engaging ways in which historical representations construct and objectify the world, students can better see how history not only constructs and conditions knowledge but also, and through such constructions, helps construct them as knowers as they encounter those constructed representations in classrooms.

Critiques of Existing Practices in History Education

Critical scholars have joined other scholars in the field to critique the prevailing "transmission" or "best story" (Seixas, 2000) model prevalent in K-12 classrooms and the general acceptance of historical representations and the grand narratives accompanying them (Segall, 1999, 2013). Challenges have also been offered regarding the dominant, constructionist approach in scholarship on history education—the disciplinary approach (e.g., Ashby, Lee, & Shemilt, 2005; Seixas, 2000, 2011; Stearns, Seixas, & Wineburg, 2000; Wineburg, 2001)—for its unproblematic use of the historical method as a means to "get to" the past and make meaning of it. Cutrara (2009), for example, questions this cognitive-based approach for positioning history and its inquiry as a purportedly neutral space that avoids "the intersection of politics and history" and "prohibits history from being used as a tool of possibility and transformation for the future" (p. 93). This instrumental focus on rationality and method, Cutrara suggests, avoids implicating power and its relationship to knowledge in historical representations and "fails to take into account how history, the past, and our encounters with both, are not always rational [or] logical" (p. 94). It also ignores the fact that students may be bringing vastly different interpretations to their encounters with representations of the past (Peck, 2010).

Epstein (2009) concurs that "expecting students to become 'little historians' without reference to whose or which history they are learning" does little to acknowledge the shortcomings of prevailing interpretations of race historically or today "and leaves unchallenged whose or which historical questions and texts are promoted by schools and society" (p. 137). Parkes (2009) uses Jenkins and Munslow (2004) to question the disciplinary approach not only for its reliance on getting at the "real" past by virtue of detailed knowledge of its sources but also for its assumption that knowing the truth of the past is possible precisely because of one's use of a sophisticated historical method to do so.

Den Heyer (2011) questions what he calls "the disciplinarian approach" for being too clinical, for not putting "ethics and social action at the center of the curriculum" (p. 155), for excluding "questions about an economy of historical distribution" that consider issues of privilege and marginalization (p. 156), and for avoiding notions of subjectivity and positionality or the "emotive, psychodynamic, and political relationships of history to present issues" (p. 157). Segall (1999, 2006) proposes that while the disciplinary approach might engage students with a careful reading of multiple historical representations, at times even exploring the nature of their construction, the historical method utilized in the process is considered a neutral vehicle to discern truth rather than a socially constructed set of procedures that are embedded in history, power, and authority that, by definition and like any other human-constructed system, advances particular—privileged—ways of knowing. The past in that approach, Segall (2006) suggests, also seems to have little relevance to the present or to the bodies present in the classroom where such representations are considered.

The Terrain of Critical History: Visions and Applications

Critical scholars also discuss what a history classroom infused with critical sensibilities might entail. These discussions imagine a history education which no longer simply explores the past for what it was but begins to see history for what it is, for what it does, and for how it could be otherwise.

Segall (1999, 2006, 2013) advocates that history education need not focus on providing students with the tools of the historian but rather tools with which to question history as a pedagogical enterprise. Rather than simply examine the past made visible through historical accounts, questions ought to be asked about whose discourse, whose standards, and whose past are made legitimate and/or illegitimate. This engages history and its education not simply as innocent descriptions of the world but as instruments intended to achieve social and political ends. Doing so, Segall (1999, 2006) suggests, exposes the values, and methodologies that legitimate and enforce particular arrangements constituting history education and its relation, through power and convention, to knowledge (see also Giroux, 1994; Giroux, Shumway, Smith, & Sosnoski, 2013). This form of teaching turns history education into an exploration of historiography and allows classrooms to become a place where the investigation of interpretation becomes "part of the object of knowledge and itself becomes an object" (Aronowitz & Giroux, 1991, p. 143). Studying the past, Segall (1999) proposes, should not be

about accepting a linear narrative of progress but about questioning historical representations, rupturing their silences and highlighting their detours (Giroux, 1994), and, in the process, investigating the interests embedded in those narratives, questioning prevailing practices governing scholarship and pedagogy, as well as how they tend help to obscure the relationship between knowledge, power, and privilege (Giroux, et al., 2013). This requires, as Willinsky (1998) suggests, "a vigilance toward what has been lost and what has been brought forward as 'history'" (p. 134), as well as a way of reconsidering "how the past remains present in the way we tend to see the world" (p. 244).

Parkes (2007, 2009, 2011) further advances the importance of historiography in history education. Centering the curriculum on issues of representation and the nature of historical knowledge, Parkes (2011), using Derrida (1976), proposes teaching history *under erasure*, whereby histories are presented and deconstructed simultaneously. In doing so, Parkes (2009) suggests,

> we come to understand what Foucault (1972) called "the conditions of possibility" for any historical narrative we encounter and [come] to know, at least potentially, what it was possible for this history to tell, and perhaps what it was impossible for it to tell. (p. 128)

A focus on historiography, Parkes (2007) adds, allows history education "to render visible the tentative, positional, and conditioned nature of historical knowledge" (p. 396) and makes history open to change by inviting students and teachers to resist not only the inscriptions underlying historical representations but also, and importantly, their own inscription within historical discourse (p. 397).

Invoking a critical pedagogy approach to promote social justice, Epstein (2009) proposes that history education must include an exploration of history's failings alongside its virtues. This, she argues, "may better equip young people to acknowledge and understand the roots of contemporary racism and inequality, to learn about the existence and effectiveness of cross-racial alliances, and to imagine themselves and act as citizens capable of change in contemporary society" (p. 137). If, she adds, "we care to involve all of the nation's students in the study of their pasts, current concepts to history education must move beyond the acquisition of state-sanctioned interpretations or disciplinary dispositions and methods toward core critical and participatory democratic goals" (p. 137).

Using Badiou's (2001) *ethics of truth*, whereby "truth" is defined not through predetermined techniques of reasoning but rather through the "material traces that a 'becoming subject' produces in an encounter with an 'event,'" den Heyer (2011) proposes history education that "has ethics at its core, positions knowledge and ways of knowing from or about the past as a warrant of claims centrally concerned with questions of justice," and where

> teachers ask students to consider the ways in which they are personally and differently "implicated" in such questions and do so in a manner that helps students make sense of possible and preferable relationships to these questions as manifested in their present desires, sense of self and other, and hopes for the future. (p. 168)

While the above versions of history education all attempt to move the field in new directions, there is rather scant evidence, beyond anecdotes, of such approaches taking root in K-12 classrooms. Still, some studies do affirm the possibilities in, and advantages of, engaging K-12 students' explorations of history through a critical lens. Parkes & Donnelly (2014) explore a senior-level, elective history extension course in New South Wales, Australia (see also Parkes, 2007, 2009, 2011). The course, they suggest, moved away from traditional history teaching, "boldly incorporated" historiography and metahistorical understanding, and invited students to examine the nature and history of history and historical knowledge, promoting a

> recognition that not only are the traces of the past "historical" in a conventional sense, but, following Gadamer (1975), that our own consciousness as historians is itself constructed within the horizons and prejudices of the historiographic traditions we have been inducted into. (Parkes & Donnelly, 2014, p. 127)

Parkes and Donnelly (2014) also report a study conducted by Hughes-Warrington et al. (2009) about Australian university students' historical thinking which found that traditional history classes "did little to change students' understanding of the nature of history as a discipline" (p. 129). However, students who had completed the high school history extension course, the study notes, "came to university more prepared to engage in discussions … about the nature of historical knowledge" (p. 129).

An out-of-school qualitative study by Cutrara (2010) engaged a diverse group of Canadian high school students with multiple historical representations of post-WWII Canada to explore their ability to think about and discuss issues of inequity inscribed within historical representation. By first deconstructing existing dominant narratives and then incorporating "alternative" representations, Cutrara (2010) suggests "participants were able to confront the difficulties in reconciling that which challenges the 'truth' structured through history, and hypothesize about the implications of historical representation for the present" (pp. 9–10). She contends that students can think about the construction of historical narratives: Those in her study became increasingly comfortable deconstructing them but were also able to recognize ways in which particular forms of justice were presented (or avoided) in existing narratives in history and became committed to defining new kinds of justice and working toward them, reaffirming the transformative possibilities when critical approaches are applied to history education.

Salinas and colleagues have, too, utilized a critical lens to incorporate alternative narratives both in school classrooms and with preservice teachers. While their findings corroborate previously noted research, they provide a more nuanced and cautious tale. Working with Latina prospective teachers, Salinas, Fránquiz, and Rodríguez (2016) note that while students constructed counter-histories addressing "oft-ignored histories of Communities of Color, doing so through traditional evidentiary trails ignore[d] the fundamental experiences and epistemological frameworks of Latinas" (p. 264); they suggest instead using

Latino Critical (LatCrit) theory that could bring those epistemologies to the surface. Salinas and Blevins (2014) suggest that simply using alternative narratives doesn't necessarily lead to critical historical inquiry. Needed, they suggest, are narratives and pedagogies that disrupt dominant ideologies and positionalities and promote a just, inclusive democracy.

Representation of Race and Gender in Standards, Curricula, and Textbooks

Among the various issues critical theory brings to the fore are the production and maintenance of issues of race and gender, highlighting the degree to which and the ways in which they are socially constructed within relations of power and domination. Exploring the implication of such understandings requires questioning not only how gender and race are taught/learned in history classrooms but also the gendered and raced nature of the discipline itself and how gender, race, and other categories of difference are produced and reproduced through dominant understandings of what the world was, is, or should be. With these questions in mind, a number of social studies scholars have invoked critical conceptual frameworks drawing on theories previously mentioned to explore representations (or lack thereof) of gender and race in history textbooks, standards, and curricula. Their work explores the relationship between representation and silence about such groups and highlights that silences are not only repressive (Daniels, 2011) but also expressive, working in conjunction to "Other" and marginalize. Utterances do not necessarily mean inclusion. Often, inclusion results in whitewashing and normalization that serves to silence and marginalize particular groups within their own histories (Hall, 1997; Prakash, 1994; Young, 1990).

Representations of Gender and LGBTQ Issues

Schmidt (2016) examined eight of the most commonly used textbooks from Canada and the US to explore how LGBTQ issues are represented and discussed. Her analysis demonstrates that, by and large, textbooks were silent on LGBTQ issues and persons. In the rare cases in which textbooks did take up such issues, representations lacked substantial engagement with LGBTQ content and did not present LGBTQ persons or movements as contributing in their struggle toward equality. In all, Schmidt concludes textbooks studied marginalized LGBTQ people and issues both through forms of representation and through absence.

In an earlier piece, Schmidt (2012) moved beyond the inclusion of women in the history curriculum and instead, using poststructural feminist lenses, examined what such silences about women, or their incorporation, entail for our understanding about women and the value ascribed to them in the history curriculum in South Carolina. Building upon the work of others (e.g., Crocco, 2001, 2006; Levstik, 2009), Schmidt (2012) maintains that women are relegated to the margins of the curriculum "as a group impacted by other events" and one that does not "produce their own history" (p. 712). Schmidt reports the curriculum

suggests "the natural place for women is the home" (p. 719) in order to laud women's "care for their children, the children of others, and, ultimately, the nation" (p. 715). When addressing women in the labor force, women are portrayed as "not creat[ing] economic opportunities or initiat[ing] changes to the labor landscape. Female entrepreneurs are absent and female labor leaders appear as participants not organizers." Historical circumstances appear to "act on women, reinforcing women's passivity" (p. 719). (For an analysis of women's representation in a South African textbook, see Fardon & Schoeman, 2010.)

Schmeichel analyzed 15 P-12 history lessons about women, appearing in social studies journals between 2001–2007, for what kinds of understandings about women the lessons promoted and produced. Schmeichel (2014) reports most lessons simply included women so students can "see" history through their eyes, neglecting to use inclusion to broaden the discussion to issues of gender. Sources, processes, structures, and norms that made women's marginalization possible, including the role of patriarchy, are not acknowledged, thus naturalizing "the circumscribed position in which the women described in these lessons find themselves" (p. 243). By failing to implicate women's experiences in the past with gender relations in the present, she adds, students are not invited to examine the degree to which and the ways in which they themselves might be experiencing similar forms of subjugation. Schmeichel (2015) also examined the rationales of the same lesson above to understand what arguments are invoked to justify teaching about women. Half of the lessons, she notes, rationalized including women to develop students' abilities to analyze primary sources or enact constructivist learning theories, positioning women and gender not as the focus of lessons but "as neutral content" through which to advance students' skills (p. 9). Even lessons that included a rationale acknowledging women's historic marginalization stopped short of addressing why women might be included in the curriculum for reasons other than parity, never making "the case that including women in the curriculum might open up spaces for the consideration of gender equity or to examine structures and processes that have systematically marginalized women" (p. 10).

Representations of Race

There is no question that race since colonization and slavery has been a central and persistent theme in American history as well as, though in different form, in histories of England, Canada, Australia, and New Zealand, where Indigenous populations and the "Others" of Empire have been marginalized and oppressed. Yet one would know very little of this looking only at history textbooks, standards, and curricula. As Chandler (2010) suggests, the question of race, at least in the U.S. context, "almost seems to be the elephant in the room, the question that no one wants to ask: How is it that the most important social aspect of our history is downplayed, marginalized, and in some cases intentionally omitted?" (p. 29). Why is it, Chandler asks, that, to a large extent, "Native Americans, African Americans, and other groups of people that have made up the American experience" are, other than in key historical events (and often not even then), "left out of the dominant narrative," even though their experiences have been central to that history (Chandler, 2010, pp. 30–31)?

Representations of Indigenous Peoples

Chandler and McKnight (2009) state that many mainstream history textbooks have tended to relegate Native Americans history to “pre” history, “the time period before Europeans began their military conquest,” portrayed in sanitized versions where “genocide and mass murder are whitewashed for public school consumption” (p. 229). Such statements are echoed by Shear, Knowles, Soden, and Castro (2015), who used a postcolonial lens to explore the frequency and substance of representations of Indigenous Peoples in K-12 history state standards across the US. Findings indicate that Indigenous Peoples are, by and large, “cast as outsiders to the master narrative” (p. 83) and that the Euro-American narrative used throughout standards “reinstitutes the marginalization of Indigenous culture and knowledge” (p. 90). “Indigenous Peoples are left in the shadows of Euro-America’s destiny, while the cooperation and conflict model,” prevalent across standards, “provides justification for the eventual termination of Indigenous Peoples from the American landscape and historical narrative” (p. 90). While some standards address the removal of Indigenous Peoples from their lands, “these standards took on a tone of detachment, focusing on political actions and court rulings rather than on the impact on the lives of Indigenous Peoples” (p. 88) and only one state, Washington, incorporated the word *genocide*. Throughout, the authors note, a “tone of detachment” prevails,

> especially with the long lists of legal and political terms [that] dismisses the humanity of Indigenous cultures and experiences in the United States. The wording of the standards themselves, across most states represents the re-colonization of Indigenous Peoples and the championing of Western ways of knowing. (p. 90)

Other studies (Chappell, 2010; Journell, 2009; Marino, 2011; Sanchez, 2001) corroborate the above findings, highlighting ways in which U.S. history textbooks present Indigenous Peoples as void of complexity and presence in modern America, along the way perpetuating stereotypes about Indigenous Peoples and rarely acknowledging their ongoing multiple contributions to American life. (For ways in which prevailing understandings about Indigenous Peoples make their way into teaching, see Wills, 2001.) Stanton (2012), who examined representations of Indigenous Peoples in Indigenous primary sources, proposes that, without adequate context, stereotypes and misconceptions of Indigenous Peoples noted above might be reified rather than dispelled. Using critical Indigenous theory, she advocates a refrain from imposing Western terms and dispositions such as the myth of objectivity, distance, and the privileging of the written word when encountering Indigenous accounts.

Representations of Latinos/as

Cruz (2002) surveyed popular U.S. history textbooks in Florida to determine the inclusion rate of Latin Americans, their portrayal, and the underlying values. She found that textbooks frequently omit Latinos and Latin Americans from the

story of the US and that, in cases where they are included, it is in "pejorative and stereotypical ways" (Cruz, 2002, p. 326), often as "alternatively violent, passive, lazy and unwilling to assimilate into mainstream US society" (p. 323). This textual bias, she adds, "is subtle—employing adverbs, adjectives, and subordinate clauses that insinuate and that suggest rather than declare" (Cruz, 2002, p. 337). In their study of 29 textbooks, Monforti & McGlynn (2010) state that Latinos are mostly depicted in relation to immigration (often as illegal immigrants and often with a negative tone) or the Civil Rights era, where their contribution is portrayed in "a few random events rather than part of an overall movement" (p. 311). In both cases, the implied message, the authors suggest, is that Latinos did not participate at other moments in history and that they are not full-fledged citizens. Rogriguez & Ruiz (2000) observe that in most textbooks Mexican Americans stand for all Latinos. "Coverage of the economic life of Latinos revolves predominantly around their experiences as wage laborers, especially in agriculture" (p. 1693); while such an emphasis may be justified, it problematically suggests "that all Latinos are working class" (p. 1694).

Representations of African Americans

Using the purview of critical race theory and cultural memory, Brown and Brown (2010) examine how historic acts of racial violence directed toward African Americans are rendered in 19 U.S. K-12 textbooks. They found that while representations of historical violence against African Americans, as well as African American resistance to such acts, are now more prevalent, those representations tend to minimize the material implications of such acts and the entrenched White privilege underlying them. While texts did not normally portray acts of violence as "haphazard occurrences" simply befalling African Americans, they are represented as "acts of autonomous immoral agents" (Brown & Brown, 2010, p. 56) and discussed "in ways that ignore, undermine, or misrepresent the larger institutional/structural ties that supported (through actions and/or inactions) and, more important, benefitted from, their enactment" (p. 45). African American resistance to violence tends to be relegated to Slavery, the Civil Rights era, and in some cases to the Jim Crow era, wrongly giving "the impression that African Americans sat back and willingly accepted the violence (and the threat of violence) as a condition of their existence" (p. 55).

Vasquez-Heilig, Brown, and Brown (2012) explore the subtle ways in which Texas social studies standards address race, racism, and communities of color. Moving beyond issues of simple inclusion to an examination of the pedagogical positioning of such inclusion, the authors "uncover the sometimes subtle ways that the standards can appear to adequately address race while at the same time marginalizing it" in a process the authors define as "illusion of inclusion" (p. 403). While the standards focus much attention on the contributions of individuals in shaping historical events (though about half of those devoted to individuals of color are termed "optional"), Vasquez et al. (2012) suggest that focusing primarily on the achievements of exceptional individuals "mythologizes and distorts racial progress, diminishing the significance of critical racial praxis or collective activity that relies on strategic mobilization and the everyday actions of individuals in

local communities and contexts" (p. 414). In many cases the standards offer teachers spaces "to avoid rather than directly tackle issues of difference, race and racism and their place in U.S. history" (p. 412).

Exploring how widely African American women are represented in a Black history textbook in comparison to two mainstream U.S. history textbooks, Schocker & Woyshner (2013) found that "black women are not represented fully enough in any of the U.S. history textbooks" (p. 30). While the authors indicate that "the percentage of women pictured is still low in comparison to men, the black history textbook shows women in a variety of non-stereotypical public and political roles" (p. 30) that are all but missing in mainstream U.S. history textbooks today.

Anderson and Metzger (2011) took a mixed-methods approach to look into four U.S. state history content standards regarding representations of African Americans from the Revolutionary War to Reconstruction. They found that the standards typically "avoid engaging students in critical analysis of historical racial tensions in order to promote a consensus narrative of social cohesion and national development" (p. 393). The standards, they add, tend to "convey a stance that there is one agreed-upon interpretation of the ideology of slavery and the origins of the Civil War" but avoid providing evidence to support that stance. Instead, standards "expect teachers and students to deduce the preferred interpretation" (p. 408) on their own. This one-sided narrative is of continuous historical development toward progress, where "bumps" along the way are resolved and the march toward universal progress continues (p. 408).

Using critical literary analysis, Alridge (2006) examined narratives about Martin Luther King, Jr. in six widely adopted U.S. high school textbooks. Textbooks tend to celebrate (and reduce) King's life and contributions to three main themes: King as messiah, King as the embodiment of the Civil Rights Movement, and King as a moderate, downplaying his progressive, radical ideas. Collectively, Aldridge (2006) suggests, such depictions "offer a sanitized, noncontroversial, oversimplified view of perhaps one of America's most radical and controversial leaders. They hide King's humanity, submerging his struggles and weaknesses and the depth of his ideas" (p. 680). In doing so, textbooks don't only do a disservice to King—the man and his ideas—but also "paint a picture of the civil rights movement as a period far removed from the present, disconnected from contemporary problems of racism, discrimination, and poverty" (p. 680). (For a critical analysis of how similar depictions of MLK were translated into classroom instruction, see Wills, 2001.)

History Education and Ethnicity

Conjoining issues of representation in curriculum with how different students make sense of history education and its lessons based on individual and group identity, Epstein (2009) has powerfully highlighted that students' identities and culture influence their views of history and historical thinking. Based on extensive qualitative research, Epstein demonstrates "how white and black [students'] racial identities shaped and differentiated students' interpretations of the contributions of racial groups, the consequences of race relations and the course of

individual rights in U.S. history and society" (p. xvi). Her work helps us understand what happens to the White-dominated curriculum when it encounters White students as well as students who, based on different racial and cultural affiliations, read history (often the same history) differently and attribute very different meanings to it. We learn how history education is used—explicitly, implicitly, and by omission—to advance particular (White) narratives about history and the nation and the opportunities such narratives open and/or close for different students to make meaning both about and in the world.

Utilizing a phenomenographic approach to explore similar issues in the Canadian contexts, Peck (2009, 2010) investigates the ways in which students' ethnic identity shapes their understandings of/in history and of historical significance and how both help forge pathways for understanding historic and contemporary issues. Her work, like Epstein's, demonstrates that students' ethnic identities are central to the ways in which they engage and discuss history and ascribe particular significance to it. Common to this scholarship is the use of some form of critical theory to explore forms of representation, as well as critiques of current, mainstream representations of women and non-White groups in society. The depth and nuance of these critiques moves us beyond counting instances of omission/inclusion to an exploration of what they "do" and the cost of such doings to historical understandings and, in some cases, how we might act to address and redress such issues, as educators and scholars, in the present.

Psychoanalytic Theories and Difficult Knowledge in History Education

A rather small but growing number of researchers, drawing on psychoanalytic theory, consider how students learn about and engage history from an affective, rather than solely cognitive, viewpoint. History education research that draws on psychoanalytic theories falls into two main categories: (1) research that engages psychoanalytic concepts to think about students' encounters with history, curricular issues of history, and the spaces of such encounters both inside and outside the classroom; (2) research that explores the way in which psychoanalytic theory and the concept of difficult knowledge are encountered by the teacher, typically within the space of teacher education with a specific focus on how a teacher's will to know impacts their pedagogical choices. Regardless of how psychoanalytic theory is being approached, though, both approaches are concerned with the affective impact encounters with history have on students and teachers and both seek to move away from the more common focus on rational engagement with a distant past through the framework of historical consciousness (Seixas, 2004; Wineburg, 2005) and historical thinking (Lévesque, 2001; Sandwell, 2008).

Psychoanalytic approaches assume there are unconscious processes that mark a person's encounters with history and that the resulting emotions from that encounter help determine the ways one can understand or resist understanding of the past. Contrary to positioning history as a neutral space that can be grasped through the application of rational thought and that views the past as something that has already happened and can be studied from afar, a psychoanalytic focus is

concerned with the affective dimensions of history that permeate through the unconscious and do not make a full distinction between past and present. As Farley (2007) explains, "from a psychoanalytic perspective, the meanings we make … will be driven by unconscious forces that are other to chronological time and that education can neither predict nor control" (p. 428). Indeed, the very idea that distance exists between the past and the present, between learner and curriculum, overlooks the complex ways in which students come to history and vice-versa. Researchers adopting psychoanalytic frames view the history classroom as a "site of conflict rather than its solution" (p. 538). Learning that stems from psychoanalytic engagement "introduces the learner into greater senses of not-knowing and greater realms of uncertainty and complexity" as opposed to simplifying the concepts being contended with (Garrett, 2015, p. 39).

One of the concepts that looms largest within psychoanalytic research is that of "difficult knowledge," defined by Pitt and Britzman (2003) as "a concept meant to signify both representations of social traumas in curriculum and the individual's encounter with them in pedagogy" (p. 755). Pitt and Britzman consider two questions: What makes knowledge difficult from a content perspective, and what does it mean to represent and narrate difficult knowledge? While there are certainly topics that lend themselves to being commonly viewed as difficult, such as slavery, war, and genocide, any topic has the potential to be difficult as the individual's unconscious seeks to protect the ego from knowing that which it may not want to know. The importance of difficult knowledge is not the delineation of a set of parameters for what can and cannot be considered traumatic, nor is it to "solve" difficult knowledge as though its presence were a problem. Rather, engagement with difficult knowledge focuses on the process of making trauma pedagogical and examining the ways in which students and teachers are able to make sense of and represent the affective dimensions of the history they encounter through their own psychical engagement.

Farley explores the role identification plays in how students enter into history through heritage fairs in Canada (2006a) and interaction with history in archives (2006b). Using a news story about a Canadian teenager who collected a rock at the Acropolis and her subsequent arrest for it, Farley (2007) compares Freud's concept of archaic inheritance (people are born with traces of the history and conflicts that came before their time imprinted in their psyche) and the difficulty of transcending an idealized past with Levinas's an-archic inheritance (history is outside of people and disrupts the internal order) to arrive at the affective conflict: While we inherit the conflicts that came before, we are obligated to do otherwise with it and move beyond.

Farley (2008) continued this work by considering a news story in which youth defaced a war memorial in Ottawa, Canada. In scenarios like this, she asks, how might the Oedipal Complex help serve as a means to uncover what happens when students come in contact with a competing want to make a mark and the need to recognize those who have made marks before them? Here "the problem of learning is less about cognition and more about how one comes to tolerate the difficult and yet ubiquitous task of having to inherit a world before one's own and that is not of one's own making" (p. 23). In considering this tension, history educators, Farley suggests, need to "re-think historical learning as itself a conflict: a

continuously negotiated tension between the childhood desire to make one's mark on the world and the obligation to remember others who have done so already" (p. 28).

Farley (2009) suggests that if representations of difficult knowledge can result in disillusionment and a move away from the certainty of the past, then history education needs to be recognized as "much more than a lesson in chronology or cognition; it is, fundamentally a psychical labor of symbolizing the internal conflicts that both complicate and constitute our attachments to the world" (p. 551). The uncertainty of learning, she argues, is where meaning can be forged, with the result being that such a space can provide the fodder for radical hope in moving forward.

The first body of research also focuses on how difficult knowledge is represented and encountered in spaces outside of the classroom, particularly within museums. As Trofanenko (2011) notes, museums often strive to create a sense of a detached and objective past that results in overlooking how youth encounter difficult knowledge. Trofanenko uses a case study of a seventh-grade student's encounter with a museum exhibit on U.S. involvement in war (positioned as always necessary) and his subsequent interactions with a veteran of World War II around the student's interest in death and dying inherent in war. The tension between the student wishing to understand the veteran's emotional presence and the desire of the veteran to protect the youth points to how emotional engagement is always wrapped up in the learning process when encountering difficult subject matter.

Other work on representations of difficult knowledge in public educational spaces include Matthews's (2009, 2013) research on how museum artifacts representing traumatic events invite affective engagement from visitors. Garrett and Schmidt (2012) consider ways in which difficult public knowledge regarding the history and legacy of apartheid in South Africa is represented in two museums and how such displays invite visitors to make meaning of a traumatic past. Farley (2010) also takes up engagements with difficult knowledge and how it is played out at a pilgrimage site, where belief trumps historical fact.

Prominent in the second theme of psychoanalytic theory in history education is Garrett's work, focusing on how preservice teachers navigate their own encounters with difficult knowledge and the resulting implications for social studies and history education writ large. In thinking about how students route and reroute knowing about traumatic events from themselves, Garrett (2011) claims

> if empathy in social studies is about feeling what it might be like to be someone else in another time and place, then a focus on difficult knowledge is about wondering what such an affective connection does to the learner, in the learner, and invokes for the learner (p. 344).

Garrett (2012) considers what happens when preservice teachers encounter a text that completely resituates what was previously known and the resulting need to consider "the loose and nonlinear chronology of learning and knowledge combined with the dynamic nature of historical work and the manner in which students attach meaning to that work" (p. 8).

Zembylas (2017) considers the implications of teacher resistance to histories rooted in trauma, suffering, and oppression that may challenge a teacher's group identity in a society marked by conflict. Writing within the context of Cyprus, Zembylas examines the ways teachers resist historical representations that challenge beliefs held by a larger group. This resistance, he suggests, is marked as "*both* the emotional engagement with a difficult event or issue *and* the opposition to particular interpretations of this event or issue … teacher resistance in difficult histories is an epistemological, ontological, and affective act of saying no to a particular 'reading' of an event or issue" (p. 5).

While not drawing upon psychoanalytic concepts, Helmsing similarly engages the affective elements of social studies education. Drawing on Deleuze and Guattari (1987), Helmsing (2014) argues for the use of affect theory in thinking about history education, especially since the substance of history is affectively constructed. One of the primary focuses of history education is the development of empathy, yet, he suggests, that development can result in passivity and ambivalence and construct a new way of avoiding implication or a deeper understanding of the affective dimensions of history. The potential stemming from affective engagement with the curriculum, according to Helmsing, is an ability to deconstruct dichotomies (e.g., us/them) that are inherently structured by affect and interrogate how social concepts and identities are constructed and given meaning and power. The result is the potential to understand how the work of the history classroom is imbued with affective meaning, not simply limited to temporal and spatial understanding.

History Education and Public Pedagogy

In keeping with the intellectual turns occurring within academic disciplines, public institutions dealing specially with history and history education—public history museums and memorial sites—have experienced resurgence and increased interest as sites for knowledge production and collective memory. History museums that serve a national mandate tend to, like textbooks, tell a story of a people who have suffered but overcome, who have triumphed over tribulations and prejudices, and who have embraced the diversity and tolerance thought to characterize modern-day societies. This is an often benign and highly selective view, telling of a nation's achievements while ignoring tenuous parts of the past. The tension facing history museums in contemporary times, where history is increasingly contested, highlights the politicized nature of history and what history the public is to (or should, or wants to) glean. Certainly, in keeping with their long-supported role, history museums not only serve to preserve objects but also allow a platform for discussion as well as intellectual and emotional engagement.

The emergence of *postmodern* museums (Message, 2006) is a reaction to shifts in the museum's pedagogical role. This new type of museum is "critical, dialogic, contradictory, and acutely aware of both its own subjectivity and that of the audience" where knowledge construction is an active engagement rather than an authoritative and directed transmission of information (Smith, 2014, p. 34).

What unites these museums is not so much their content—although many of them are dealing with so-called "difficult" or traumatic histories as noted above—as their representational strategies and historically defined commitment to (and public expectation of) public pedagogy.

The increased interest within educational research in the roles museums play in supporting (or not) history education and teacher education has resulted in a limited but critical body of scholarship examining the museum as a pedagogical site (Trofanenko, 2015). More recent moves toward engaging critical theory in museums are noted in two examples of recently published thematic issues highlighting the interconnection between history museums and education from a critical standpoint. In the first thematic issue, scholars (Gaudelli & Mungur, 2014; Helmsing, 2014; Segall, 2014; Trofanenko, 2014; Zembylas, 2014) engage with the broader sociopolitical pedagogical concerns, exploring what knowledge is presented in history museums, as well as examples of the tensions history teacher educators face when considering what and how knowledge is framed within museums. Specifically, they reflect on the politics of representation and how it defines both knowledge and identity as they are played out in classrooms and public educational spaces. In the second thematic issue, scholars (Blumer, 2015; Dean, 2015; Failler, 2015; Joo, 2015; Milne, 2015, Sharma, 2015; Wodtke, 2015) focus specifically on one museum—the Canadian Museum for Human Rights (CMHR) in Winnipeg, Canada—and examine difficult knowledge both in the exhibition space and beyond. These scholars examine what responsibility of care such a museum holds to its communities, the relationship between representation in and outside the museum, and the binding of human rights and their violations to a general moralizing of social justice engagement. Collectively, these scholars challenge the idea of living with historical injustices without questioning the ethical responsibilities of learning through the practices of remembrance.

Simon's foundational scholarship on the history museum's changing normative role highlights how museum practices engage the past in ways that compel critical thought. In particular, he outlines how the museum's cultural pedagogy presses up against a pedagogy of remembrance to then highlight the museum's ethical role, including the need for history educators to consider the complexities of museums and the limitations held within. While not particularly focused on any specific historical event, narrative, or timeframe (with the exception of his oral history Shoah project and his examination of the "Without Sanctuary" exhibit), he examined the relationship between public exhibitions depicting trauma, violence, and death and how we need to understand how the emotional and affective reactions remain hopeful in what we can learn from the experience (Simon, 2005, 2006, 2011).

Interest in how difficult or traumatic histories are presented (or ignored) in history museums has been the focus of recent critical research. Trofanenko and Segall (2012) and Segall and Trofanenko (2014) examine how the National Museum of the American Indian (NMAI) in Washington, DC, provides visitors a physical curriculum—a path—that allows them to avoid encountering the difficult knowledge regarding the treatment of Native Americans during "contact." Certainly the NMAI ensures Indigenous Peoples are not relegated as objects or

situated in the past. Yet, simultaneously, it avoids implicating visitors and the US more broadly in that "treatment" in the event they do stumble across such knowledge. More broadly, and across several exhibits, the authors suggest, the museum positions Native Americans' traumatic experiences as being fully in the past without residue or ramifications in the present.

Segall further (2014) compares how the NMAI and the Holocaust Museum in Washington, DC, invite visitors to experience and/or avoid the difficulty of the substance of the issues represented in each museum. While their subject matter is vastly different, and the NMAI is not as forthcoming in presenting difficult histories, both museums, Segall suggests, nonetheless share a pedagogical stance that distances the past and avoids implicating visitors and/or the present-day US in such knowledge and its consequences.

A theme prevalent in many history museums is the ways war and a nation's involvement serve to define a nation and its collective identity. Absent in much research on youth engagement with war, however, is war's emotional charge and how youth are to know about such events. Trofanenko (2008, 2011), in examining how war has been curated and the response various constituents hold to such exhibitions, argues for the need for educators to consider the emotional demands placed on youth when encountering representations of war within museums. It is not enough to utilize the museum for its collections of objects or archived stories told by veterans. Rather, she suggests, to understand and advance the intellectual expectations requires acknowledging how youth's learning is an emotional engagement. The often-held belief that youth should be protected from such topics, she maintains, ignores their present-day bombardment by information. To utilize the public pedagogical purpose museums serve requires both acknowledging the discrete disciplinary knowledge held by educators and museum educators and realizing the abilities of youth to critically engage in understanding the museum project (Trofanenko, 2008, 2015).

Common across the literature discussed in this section is an increased focus on the public pedagogical mandate history museums serve and the knowledge and understandings they advance. Much like research described in other sections of this chapter, interest is centered on what and whose knowledge and knowing about the past and present museums foster, how they do so, and with what consequences. Research on history museums as pedagogical spaces is important not only because it highlights the role of museums in the public's continued education about the past but also because it focuses on history museums as curricular and pedagogical spaces. Such a focus can, we believe, infuse K-12 history education with new insights as to how we might think differently about curriculum and pedagogy both inside and outside of the classroom and about connections to be made between them.

Conclusion and Future Directions

A decade ago, a handbook chapter on critical theory and history education would have resulted in no more than a few pages. Being pressed for space this time around, and having to make difficult decisions as to what to include (and thus

exclude) illustrates how the field has developed and grown, especially in recent years with a new cadre of scholars making important contributions that have expanded the field in new and interesting directions. We expect this trend to only increase in the coming years. This, we believe, is exciting not simply for the community of scholars engaging history education through the various lenses of critical theory but also for the new forms of theorizing it offers the broader field of history education.

While the literature cited in this chapter has illustrated a more robust application of critical lenses to the substance (content) of history education, we would encourage similar engagements with the field's pedagogies—that is, applying the same critical lenses to what does and does not yet take place through teaching and learning in classrooms. We also call on researchers to make better (and more visible) use of methodological tools offered by critical theory (Jackson & Mazzei, 2012) in/for our research and for the opportunities they afford to rethink the forms of textualization, authorship, authority, and voice used in research reports. This also means attending to complexities of studying others, and the nuances inherent in the places we study, and acknowledging the inherent forms of power and authority—even violence—embedded in any research act (Lather, 1991, 2007; Patel, 2016).

Endnote

1 Some proposed readings in each of these theoretical stances: *postmodernism* (Lyotard, 1984), *poststructuralism* (Derrida 1976, 1978; Foucault, 1972, 1977, 1980), *postcolonialism* (Bhabha, 1994; Said, 1979; Spivak, 1994), *feminism* (Butler, 1990; Collins, 1990; hooks, 1984), *critical pedagogy* (Freire, 1970; Giroux, 2011; Kincheloe, 2008; McLaren & Kincheloe, 2007), *critical race theory* (Delgado & Stefancic, 2012; Ladson-Billings & Tate, 1995), *psychoanalytic theories* (Britzman, 1998, 2003, 2009; Felman, 1982; Freud, 1990; Lacan, 2006).

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12

National, Ethnic, and Indigenous Identities and Perspectives in History Education

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Less than 20 years ago, researchers interested in students' historical understandings began paying attention to the ways in which identity can shape one's interpretations of history. Levstik (1999) was one of the first scholars to argue that research on students' historical thinking should always include questions of identity:

> Making sense out of history—perhaps especially national history—can never be a simple task. This is especially the case in post-colonial, multicultural societies. In these contexts in particular, any investigation of children's historical thinking is also an investigation of positionality—of children's different local and present as well as national or international historical contexts. The influence of these contexts makes it difficult to decide what constitutes a nation's history. (p. 4)

A growing body of research on students' historical understandings indicates that the positionality of the learner is a vital component for understanding how one engages in thinking about the past. Many scholars have begun to recognize the impact of socioeconomic, cultural, political, and gendered factors on students' understanding of various aspects of history and have incorporated these elements into their research design and data analysis procedures (Almarza, 2001; Barton & McCully, 2004; Epstein, 2009; Seixas, 1993; Terzian & Yeager, 2007). This research tells us that students, most notably those from ethnically diverse backgrounds not of the majority culture, find it difficult to make connections between their family and/or ethnic histories and those which are taught in

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school. This is particularly true when neither the school nor the teacher makes explicit attempts to establish such links. For example, after working with an ethnically diverse group of students, Seixas (1994) found that although "many students expressed rudimentary historical understandings that could provide a framework for further learning," these same students "also expressed frustration at the school's failure to build upon that framework" (para. 4). The failure of schools to build upon students' prior historical knowledge is problematic both for students from the majority/dominant culture and for minoritized students; the potential to significantly enrich both groups' understandings of history is lessened when these connections are neither sought nor explored. Note that I am purposely employing the term *minoritized* rather than *minority* "in order to capture the active dynamics that create the lower status in society, and also to signal that a group's status is not necessarily related to how many or few of them there are in the population at large" (Sensoy & DiAngelo, 2012, p. 5).

The literature reviewed in this chapter dates back to the 1990s, when studies into the relationship between students' ethnic, cultural, and national identities became a research focus for a number of scholars (Epstein, 1998; Levstik, 1999; Seixas, 1993). Since then research investigating the interplay between students' complex identities and their historical understandings has grown exponentially. This research has typically been grounded in sociocultural frameworks that emphasize the need to understand the social, cultural, and political positions from which students approach learning (Barton, 2001; Epstein, 1997; Nieto, 2004; Wertsch, 1998). I have included a broad range of international research on national, ethnic, and Indigenous perspectives in history education in this chapter; however, I acknowledge that this review may not be exhaustive given how quickly this field is growing.

I have three main goals for this chapter. First, I will argue that the history education community has not sufficiently theorized the concept of *identity*. I will draw on literature from relevant theorists to explore the concepts of *ethnicity* and *ethnic identity*, paying particular attention to the complex and contested nature of these and other identity-related terms. Second, I will review international scholarly research that focuses on intersections of students' national, ethnic, and Indigenous identities and their perspectives and understandings of history. This section of the chapter will be organized thematically in order to identify the major understandings that have emerged from this research. Finally, I will conclude the chapter by identifying areas requiring future research and also arguing for the use of more innovative research methods that can more fully capture the complexity of identity-related questions in history education research.

Unpacking Ethnicity

What do we mean when we speak of *ethnicity* or *ethnic identity*? How do these categories differ from *race* or other cultural forms of identification? My purpose is to provide a concise analysis of contemporary scholarship in this field rather than an historic review of the literature on these concepts.

Critical and postmodern academic scholarship has had an important influence on the field's understanding of ethnic identity and related concepts such as ethnicity. Rattansi (1999) called for a radical rethinking of ethnicity, wherein

> the first "postmodern" move must be to decentre and de-essentialize [our thinking on concepts like ethnicity], by postulating what is often glimpsed but rarely acknowledged and accepted with any degree of comfort: *there are no unambiguous, water-tight definitions to be had of ethnicity, racism, and the myriad terms in between* (Omi and Winant, 1986, pp. 68– 9). Indeed, all these terms are permanently *in-between*, caught in the impossibility of fixity and essentialization. (pp. 79–80, emphasis in original)

Rattansi's caution is an important one. Johnston, Gregory, Pratt, and Watts (2000) claim that ethnicity "is one of the most difficult concepts to define: researchers disagree on the meaning of the term; social groups differ in their expressions of ethnicity; and some theorists challenged the credibility of the concept in the first place" (p. 235). They go on to explain that

> in contemporary usage, ethnicity is seen as both the way in which individuals define their personal identity and a type of social stratification that emerges when people form groups based on their real or perceived origins. Members of ethnic groups believe that their specific ancestry and culture mark them as different from others. As such, group formation always entails both the inclusionary and exclusionary behavior, and ethnicity is a classic example of the distinction people make between "us" and "them." (p. 235)

These authors also articulate two major misconceptions about the term ethnicity. The first concerns the use of the term only in reference to minoritized groups (Johnston et al., 2000). In many regions in North America, the dominant group is most often White and of European descent, and rarely sees itself as having an ethnicity. This inability, or refusal, of the dominant group to see itself as ethnic is due, in large part, to the privilege it wields in society (Carr & Lund, 2007; Kincheloe & Steinberg, 1997).

The second misconception occurs "when the terms ethnicity and race are used interchangeably, or when they are seen as variants of the same classification system" (Johnston et al., 2000, p. 235). Race is a highly contested concept. It is widely held that the biological foundations of the term have long been discredited. However, that discrimination based on the idea of race continues to exist cannot be denied. McLaren and Torres (1999) posit that "it is racism as an ideology that produces the notion of 'race', not the existence of 'races' that produces racisms" (p. 47) and argue for "a clear understanding of the *plurality* of racisms," (p. 47; emphasis in original) including their historical evolution. However, scholars such as Dei, Karumanchery, and Karumanchery-Luik (2004) have theorized the saliency of race in contemporary society, and "question assertions that place race as an exclusively ideological construct" (p. 27). They argue that

> it is problematic to argue against the reality and utility of the race concept, based solely on the fact that pseudo-sciences backing *biological functionality* have no scientific grounding. To do so negates the practical applications and circumstances of race's social, political, economic and material impact on societies in general and on racialized bodies specifically. (p. 32; emphasis in original)

Johnston et al. (2000) argue that while racial identity is most often ascribed by others based on phenotype features, "the most basic difference between race and ethnicity is that ethnic affiliation arises from inside a group; ethnicity is a process of self-definition" (p. 236). In other words, the development of a person's ethnic identity occurs through social interaction within a cultural group and personal reflection on what it means to belong to such a group. It is an ongoing process and, as Rattansi (1999) noted above, necessarily retains a certain level of ambiguity.

But, others suggest that the process of self-definition also occurs through interaction with members outside of ethnic groups. For instance, Nagel (1994) argues that

> ethnicity is constructed out of the material of language, religion, culture, appearance, ancestry, or regionality. The location and meaning of particular ethnic boundaries are continuously negotiated, revised, and revitalized, by both ethnic group members themselves as well as by outside observers. (pp. 152–153)

Nagel (1994) goes on to explain that

> since ethnicity changes situationally, the individual carries a portfolio of ethnic identities that are more or less salient in various situations and vis-à-vis various audiences. As audiences change, the socially defined array of ethnic choices open to the individual changes. This produces a "layering" (McBeth 1989) of ethnic identities which combines with the ascriptive character of ethnicity to reveal the negotiated, problematic nature of ethnic identity. Ethnic boundaries, and thus identities, are constructed by both the individual and group as well as by outside agents and organizations. (pp. 154–155)

Jenkins (1996), a social anthropologist, offers the following definition of ethnicity:

i) ethnicity is about cultural differentiation;
ii) although ethnicity is centrally concerned with culture it is also rooted in, and to some extent the outcome of, social interaction;
iii) ethnicity is no more fixed or unchanging than the culture of which it is a component;
iv) ethnicity is a social identity, which is both collective and individual, externalized in social interaction and internalized in personal self-awareness. (pp. 810–811)

Drawing on Bentley's (1987) research on a young Maranao woman's sense of ethnic affinity, Jenkins (1996) also identifies several "markers of ethnicity such as language, religion, non-verbal behavior, etc." (p. 813; see also Stasiulis, 1990).

Barker (1999) agrees that ethnicity is "centered on the sharing of norms, values, beliefs, cultural symbols and practices" (p. 62) but also argues that because

> ethnicity is a relational concept concerned with categories of self-identification and social ascription … ethnicity is not best understood in terms of cultural characteristics *per se*, but as a process of *boundary* formation which is constructed and maintained under specific socio-historical conditions. (p. 62; emphasis in original)

Sociologist and cultural theorist Stuart Hall (1991) agrees that understanding one's ethnic identity is an ongoing process, one that views "identity as contradictory, as composed of more than one discourse, as composed always across the silences of the other" (p. 49). Hall notes the importance of reflecting on the various aspects that make up one's identity and the ways in which identity is projected to, or interpreted by, others.

Although there are no universally agreed upon definitions of ethnicity or ethnic identity—indeed, Pryor, Goldmann, Sheridan, and White (1992) describe ethnicity as a "conceptual maze" (p. 215)—each of the above explanations of ethnicity carry similar characteristics. First, ethnicity is fluid and potentially plural in nature. The enunciation of one's ethnic identity may change depending on the social, political, and/or cultural context in which one finds oneself. Second, the development of ethnic identity is both a personal and a social process, which occurs through inter- and intra-group boundary formation. Individuals look not only within themselves but also within-group for clues to their ethnic identity. Individuals also take cues from the larger society, including people and social and political institutions, to define their identity. Finally, some of the markers associated with ethnic identity include language, religion, appearance, ancestry, regionality, nonverbal behavior, values, beliefs, and cultural symbols and practices. I have purposely omitted race from this list of ethnic identity markers due to the contested nature of the term and the caution raised by Johnston et al. (2000) concerning the potential conflation of the terms ethnicity and race.

The above discussion on dimensions of ethnicity and ethnic identity complicates the once taken for granted belief that ethnicity and ethnic identity are easily defined concepts. As Grant (1997) argues,

> individuals, even whole groups, may operate in more than one culture, without moving totally from one to the other. This does not necessarily mean that the two (or more) are equivalent or interchangeable; cultures can have their own domains of operations, as languages have…. The main point is that it is possible and common to live in two cultures (or more) without rejecting either and that the ways of doing so take different forms according to the circumstances of the cultures themselves and their individual members. (p. 20)

The relevance of the theoretical work on ethnicity and ethnic identity for educators and educational researchers is clear, particularly given the increased mobility of diverse groups of people around the world (Organisation for Economic Co-operation and Development [OECD], 2015) and that more history educators and researchers are attending to questions of identity and students' historical understandings in their teaching and research as the diversity in classrooms becomes more complex. In order to better understand and do justice to the students in our classrooms, it is incumbent on educators to take the question of students' self-identifications (ethnic or otherwise) seriously. According to Cummins and Early (2011), "the ways in which teachers negotiate identities with students can exert a significant impact on the extent to which students will engage academically or withdraw from academic effort" (p. 24).

Students' Identities and Historical Understanding

An analysis of the literature reviewed here has revealed five themes that will contribute to our understanding of how students' ethnic identities influence their historical understandings. These themes include identity and students' narrative constructions, the role of identity in evaluating historical evidence, the connection between agency and identity, identity and differing ideas of progress, and identity and conceptions of historical significance.

Identity and Students' Narrative Constructions

The construction of historical narratives involves, among other things, the purposeful selection of historical people, places, and events and the explanation of the relationships between them. Barton and Levstik (2004) argue that historical narratives are "constructed sequences of events that are both causally related and chronological" (p. 132). Historical narratives also have purpose. At a very basic level, historical narratives answer the following questions: who, what, when, where, why, and how? In consideration of these questions, historians mobilize evidence, establish causation, evaluate progress and decline, and make decisions about historical significance (Lévesque, 2015; Shemilt, 2009). *What is the narrative about?* is the essential starting point. Establish this, and historians can more easily answer questions about timeframe (beginnings and endings), actors and their actions, and context. This approach (to narrative construction) has as its starting point a specific narrative in mind. Events, people, and developments are carefully selected to fill out a narrative precisely because they fit the story the historian wants to tell. This approach begins with a larger narrative and its larger themes and places the particular within them.

Another approach to constructing historical narratives is to focus on a particular event and then build a narrative around it. Instead of starting with *what is this narrative about*, some may begin by noting their interest in a particular event, person, or artifact, for example, moving from the interest to the question *why am I interested in it?* As they answer these questions, they may begin to construct a larger historical narrative, linking the particular event (or person, or artifact) to

a larger set of developments and themes. The second approach starts from the particular and builds toward the larger narrative and its themes.

Barton and Levstik (2004) argue that, from an early age, most North American students are very familiar with historical narratives because of frequent encounters with them. Students read, construct, and repeat narratives without necessarily recognizing them as such. Official (dominant) and unofficial historical narratives permeate society. They appear on television and movie screens, in books and newspapers, in museums, in textbooks, and as stories passed down through generations. White (1998) argues that "no given set of causally recorded historical events can in itself constitute a story; the most it might offer to the historian are story *elements*" (p.18; emphasis in original). He further asserts that the same events can be viewed as either comic or tragic, "depending on the historian's choice of the plot structure that he [*sic*] considers most appropriate for ordering events of that kind so as to make them into a comprehensible story" (p. 18).

Much of the research on the relationship between students' identities and their historical understandings focuses on students' narrative constructions and the ways in which students are able (or not able) to use historical narratives to situate themselves and/or their family or ethnic group in their nation's past (e.g., Alphen & Carretero, 2015; Carretero, Castorina, & Levinas, 2013). While some of this work has found that students' narrative constructions align with "official" historical narratives (e.g., An, 2012; Barton & Levstik, 1998; Barton & McCully, 2012; Terzian & Yeager, 2007; Yeo, 2015), many note the presence of counter-narratives in students' thinking (e.g., Epstein, 2009; Goldberg, Porat, & Schwartz, 2006; Létourneau & Moisan, 2004; Wertsch, 1998).

One of the earliest studies of this kind was conducted by Seixas (1993). He investigated "the interaction of family and school as sources of historical understandings" (p. 303) through interviews with six high school students before and after their work on family oral history projects completed as part of their history class. For most of the students, family experiences were important in so far as they shaped "the students' underlying approaches to history" (p. 320) as opposed to acting only as important sources of information. Students relied on family histories and experiences to help them process historical information, and thus these "had a profound impact on how many of these students understood history" (p. 319). While one student found that the family oral history project enriched the knowledge she acquired in school and made her feel "more confident vis à vis her own ethnic community" (p. 308), another student "found it difficult to make any connections between the Canadian history she was learning in school and Chinese history" (p. 316) with which she was well acquainted. Similarly, Hawkey and Prior's (2011) work with ethnically diverse children in England found that "family and community influence can have a great impact on the response that students have to their experience of history at school" (p. 242).

Epstein (1998, 2000, 2009) built on this line of work with an examination of how students' racialized identities affect their narrative constructions of the history of the United States. Epstein performed a case study analysis of an 11th-grade U.S. history class in the Midwestern US over a two-year period. The case study involved collecting data from a classroom, a teacher and 10 students, five

of whom were of European descent and five of whom were African American. The students in the study were asked to perform a specific task that consisted of choosing 20 (out of a total of 51) captioned pictures cards of the most significant actors and/or events in U.S. history. The students were then interviewed by either the researcher or a graduate student and were asked to elaborate on their choices.

Epstein (1998, 2000, 2009) determined that students held four general perspectives on racial diversity in U.S. history. Students of European descent tended to see American history from either a traditional Eurocentric perspective or a revisionist Eurocentric perspective. Students who held a traditional perspective envisioned the history of the US in a positive manner and failed to mention any bleak spots on their nation's past. The revisionist perspective differs from this only slightly in that it at least acknowledges the negative effects (i.e., colonization, racism) of European exploration. In both perspectives, European American students felt that Europeans and/or European Americans alone were responsible for shaping the nation's development and that the nation was based on a solid ground of democratic ideals that were available to most, if not all, citizens.

Students of African American descent perceived U.S. history from either an "Afrocentric" or a "double historical consciousness" perspective (Epstein, 2000, pp. 198–200). Students who understood the history of the US from an Afrocentric perspective believed that traditional democratic symbols (freedom, rights, democratic rule) upon which the history of the US is based enabled the enslavement of African Americans by European Americans. As such, these students constructed a collective racialized identity based on what they saw as African Americans' fruitless struggles for freedom and democracy. Those who interpreted the history of the US from a double historical consciousness perspective understood that the nation began with European exploration, colonization, and the exploitation of Native Americans (Indigenous peoples) and African Americans. These students constructed a view of nation where White racism played a significant role in its formation and development and continues to influence contemporary conditions. Epstein (2000) argues that history teachers need to be aware of "the difficulties of teaching history to students who had constructed perspectives based primarily on the historical experiences of the racial group with which they identified" (p. 204).

Following a similar thread, Barton and Levstik (1998) investigated "how early adolescents (fifth through eighth grade) evaluate significance in American history, and how they use history to create a sense of collective identity" (p. 479). Concomitant with these research goals is a desire to "understand how students mediate the demands of the 'official' story of American history and their own, frequently more ambiguous, knowledge of the past" (p. 480). They asked 48 students to perform a task much like the one Epstein required of her participants. In this case, students working in small groups were asked to select "from among a set of twenty captioned historical pictures" (p. 481) eight people and/or events that they considered the most significant people/events in U.S. history over the past 500 years. Upon completion of the task, the researchers interviewed the groups of students both to explore their explanations for their choices and to discuss possible alternatives and selections that the students thought no one would pick.

The findings from Barton and Levstik's (1998) study can be divided into two broad themes. First, students understood the significance of historical events as a way of legitimizing contemporary society. The students' narratives

> focused to a large extent on the origin and development of the United States as a social and political entity, on the creation and development of what they perceived as uniquely American freedoms and opportunities, and on the beneficial effects of technological change. Students generally excluded, on the other hand, pictures of people and events that they recognized as having widespread impact but could not assimilate to their image of the country's continuous and beneficial progress. (p. 482)

In general, ethnicity did not appear to be a factor influencing students' ideas about the origins of the country, American exceptionalism, or the progressive expansion of human rights. An (2012) found similar results in her work with Korean American students, although she attributes her participants' adherence to the progress narrative to several factors including their middle-class status and their "lack of exposure to counter narratives to the official history" from their first-generation immigrant parents (p. 16).

The second major theme evident in the students' responses was "an alternative story in which the promise of the Bill of Rights was thwarted" (Barton & Levstik, 1998, p. 490). Barton and Levstik (1998) have termed this *vernacular history*, positing that vernacular histories "often arise from the perception on the part of community members that their values and first-hand experiences are ignored or discounted" (p. 491) by the dominant group. When it came to the vernacular histories, Barton and Levstik noted an important difference in students' narrative constructions. For example, "for European-American students, the continuation of racism was a puzzle" (p. 491) given their understanding of the universality of rights and freedoms. However, the African American students were not puzzled by this at all. They understood that, "while there had been progress … the problems that remained were daunting" (p. 492).

Clark (2008), building on the work of Barton, Levstik, and Seixas among others, argues that teachers would do well to encourage students to analyze conflicting accounts of the past rather than expecting students to cling to a narrative they may or may not believe in. In her research with Australian youth, she found that students had difficulty making sense of the "uplifting national character" (p. 4) narrative espoused in their history classes and thus tended to reject it. Similarly, Goldberg's (2014) study with 176 Israeli Jewish and Arab high school students found that history teaching that uncritically emphasized the dominant group's perspective "appears to decrease openness to the other side's perspectives" (p. 462). (See also Goldberg & Ron, 2014; Goldberg, Schwarz, & Porat, 2011; Lévesque, Croteau, & Gani, 2015.)

Peck's (2010) study with an ethnically diverse group of Canadian high school students revealed that students' ethnic identities were a powerful force in shaping how students constructed both narratives of the nation's past and their place in it. Dissatisfied with previous work that compared students' perspectives without digging deep into how they understood their own ethnic, cultural, and/or Indigenous identities and how these might influence their historical thinking,

Peck asked students to provide detailed descriptions of their own ethnic identities rather than assigning students a label herself. This self-identification was followed by asking students about the connections they made (or not) between aspects of their identity and historical events from, and narratives about, Canada's past. Peck's research confirmed the theoretical work on ethnicity reviewed earlier through data that revealed students' complex and shifting notions of what it means to be Chinese-Canadian, or Indigenous, or third-generation Canadian, for example, with some students perceiving that particular "sides" of their identity were at play when they were narrating Canada's past. (See Hawkey & Prior, 2011 for similar findings with students in England.) Peck (2009) argues that a critical approach to teaching historical thinking

> provides students with a means to not only construct historical narratives, but also to sift through the layers of identity that influence their own understandings and interpretations of history.... Thus, historical thinking, with an explicit focus on identity, can lead to a shared quest for understanding from where the other person speaks. (p. 71)

(See also Grever, Haydn, & Ribbens, 2008; Hawkey & Prior, 2011; Létourneau & Caritey, 2008; Lévesque et al., 2015; Rossi, 2015; Zanazanian, 2010, 2015.)

Tinkham's (2013) research in Nova Scotia, Canada, sought to better understand if and how Mi'kmaw students who attended either a band-controlled school (a school under the jurisdiction of the local Indigenous authority) or a provincially (government) controlled school were able to resolve tensions between the history they learned at home and that which they learned school. The participants who attended the band-controlled school reported that they did not feel they had to choose between two knowledge systems and noted few tensions between their home and school learning. The students attributed this to the close connections between the school and the community and the work of their teachers to help bridge this divide. When problematic narratives were encountered, such as the story of Columbus "discovering" North America, their teachers helped them critique and navigate this terrain. The same was not true for the students in the provincially controlled school. Students at this school reported that they had to take an active role in resolving any tensions between contradictory home and school knowledge. They sought out connections on their own and had little support outside of their relationship with the sole Mi'kmaw teacher on staff. Similarly Neeganagwedgin's (2015) research with 10 community members and knowledge holders in Jamaica provides important insight into the risks associated with challenging dominant historical narratives, particularly for Indigenous students. As one interviewee noted, "While growing up in Jamaica, I heard about the Taìno people's extinction. It was perpetuated in educational texts and was difficult to hear. I, and others around me, knew otherwise, but I could never contradict it without suffering negative consequences" (p. 377).

The Role of Identity in Evaluating Historical Evidence

In addition to shaping the overall narratives that students construct, ethnic identity plays a role in how students think about and evaluate evidence. Epstein (2000) found that some African American students "critiqued textbook and

other mainstream accounts of U.S. history, which they believed omitted African Americans' contributions to the nation and credited European Americans almost exclusively with invention and discovery" (p. 202). For the students in Epstein's work, the story of the nation was not accurately represented in the textbooks used in schools.

Similarly, Almarza (2001) found a strong link between the ethnic identity of the Mexican American students in his study and the trustworthiness they applied to the evidence given by their history teacher to support her history lessons. According to Almarza (2001), whose case study provided thick description of the classroom environment in which the students were ensconced, the students were so detached from what was happening in the classroom that "the exclusively white oriented American history curriculum even failed to convey to Mexican American students the significance of the contributions of white people to the historical evolution of the American society of which these Mexican American students were part" (p. 13). Minoritized students' distrust of the curriculum and textbook is not universal, however. In An's (2012) study of first-generation Korean American high school students' perspectives on U.S. history, she attributes the students' trust in textbook accounts to a lack of exposure to alternative narratives in the home and community. Thus, as with all work on identity and students' historical understandings, generalizations should be avoided and findings must be understood in the context in which the research is conducted.

In a study investigating students' cultural comprehension of textbook narratives, Porat (2004) found that students' ethnic identities had a strong influence on how they interpreted historical evidence. Porat's participants included Mizarchi, Ashkenazi, and Mizarchi-Ashkenazi Jews. In an activity in which students read aloud a textbook excerpt describing the Tel Hai event as an "accidental (or revisionist) narrative"—a narrative that purposely shaped the event such that it could only be read to have "had no lasting significance in determining the borders of Palestine and later the State of Israel" (p. 972)—several students were able to integrate the accidental narrative "into the well established cultural [and more heroic] account that dominates [their] social milieu" (p. 980). One student even read more into the text than what was written during the read-aloud exercise: "The Arabs claimed as an excuse that they were shot at, this is not written here [in the textbook] but I think this is what happened, and then they began to shoot" (p. 979). This is quite interesting for it is an example of a student using his prior knowledge—however gained (ethnically, culturally, socially)—both to challenge the authority of the text and assimilate his knowledge into the text. This is akin to the Estonians in Wertsch's (2000) study who were fluent in at least two accounts of the past: the state-controlled, public, official, Russian version of history that was taught in schools and the unofficial, private version that "consisted of loose collections of counter claims to assertions found in official texts" (p. 39). Other students in Porat's (2004) study, who lived in a different social milieu from the students described above and in which the accidental narrative of Tel Hai fit with their knowledge of the event, "could thus adopt the textbook account wholeheartedly" (p. 982).

Students in each of these studies were influenced by their ethnic, cultural, or national identity when faced with decisions about historical evidence. Students in two of the three U.S. studies appear to have dismissed the historical information

presented to them, either in their textbook or by their teacher (Almarza, 2001; Epstein, 2001). As Porat (2004) notes, the students in his study "could have questioned the validity or perspective of the textbook, or could have redefined their cultural view in order to correspond to the textbook account. They did neither. Instead, they inserted their cultural narrative into the textbook narrative" (p. 989). This seems to be a survival instinct (we must tell our story or it will be forgotten). Given the social milieu in which the study took place, this seems a plausible explanation.

Agency and Identity

Historical agency is concerned with relationships of power, the people and institutions that effect change in society, and the cultural tools used by these people and institutions to effect change (Seixas, 1996; Wertsch, 2002). It is hardly surprising that students of different ethnic, cultural, or national identities are drawn to different historical actors for hero worship or to attach blame. But, while research shows there may be some commonalities across ethnic groups—in Epstein's (2000) study both European Americans and African Americans single out John F. Kennedy as an important American, for instance—in some cases this means that students in the same class end up feeling that they are learning a significantly different history than their peers.

This tension was apparent in Almarza's (2001) study with Mexican American students. One student complained about the content of her American history course because her teacher "just talks about what whites did … it seems … that whites are the only ones who have history … she doesn't talk about Indians … she doesn't say that Mexicans were here [in the United States] first" (p. 13). This student was searching for historical actors that reflect the diverse population of the US, including her own Mexican American ethnicity. Another student asked, "What is the meaning for us [Mexicans] to learn a bunch of dates and wars in which white people participated? NONE! What we are interested is in our ancestors … to know the history of our people" (p. 13). Almarza concludes that the Mexican American students in his study "regarded 'their' history separately from American history" (p. 13) and were thus detached from the history to which they were exposed during their eighth-grade year.

While the European American and African American students in Epstein's (2000) study agreed on some European American historical actors as major shapers of the nation, the African American students also critiqued mainstream textbooks and accounts of U.S. history for omitting African American history and for over-crediting European American contributions. In addition, while the African American students were very clear to name Whites as causes of African American oppression (past and present), the European American students were very vague, only naming abstract forces such as slavery and segregation as causes of past oppression. Although Epstein does not state that the European students in her study *resisted* naming European actors as causes of past oppression, it is true that they failed to do so explicitly. This is consistent with how the European American students in Chappell's (1994) study dealt with the US's record on Japanese internment. Chappell's study, which took place over three semesters at

a predominately White university in Wisconsin, focused on her students' reactions to a unit on the internment of Japanese Americans during World War II. In their journals, the majority of Chappell's students denied that the motivating factor behind the internment was "race." Many students resisted "information about something they saw as a challenge to the validity of their cultural codes" (p. 4).

While Chappell (1994) admits that she was somewhat surprised by her students' resistance to what they were learning about the history of the Japanese American internment, she came to understand their dilemma:

> My resisting students may have been naïve in their limited perceptions of racial and cultural difference. But in that first class, I was naïve in not having stopped to consider how the news of the internment might sound from inside their skins. Most had skin of the same pinkish tone as mine, but they had not had the time, never mind the opportunity, to experience literature and interracial relationships as I had. Their lives have been lived in overwhelmingly Caucasian, Eurocentric, middle-class contexts. They want "civil rights" to be over, taken care of, not their fault. They don't want to think of themselves as privileged—they want to think they, their parents and grandparents, have earned the comforts that invisibly define their lives. (p. 8)

Chappell's experience serves as an important reminder that challenging the status quo and strongly held assumptions is difficult work. But, as students "learn to question the ideas they have unconsciously formed" (Wade, 1992, p. 18)—in this case about agency—they learn to think in more sophisticated ways both about history and about their identity and the identity of others. As Åström Elmersjö (2015) notes, "because students tend to interpret what they learn into the narrative they already know (Wertsch, 2000; Porat, 2004; Malmros, 2012), the teaching of history cannot be separated from the historical culture within society at large of which schools and education are integral parts" (p. 163).

How agency is represented in official texts is a point of contention, particularly for ethnic, cultural, and/or national groups outside of the dominant group. Some minoritized students have dealt with this by challenging the dominant discourse, while others have disengaged altogether. From a critical pedagogy perspective, what is needed is for all students, regardless of ethnic, cultural, or national identity, to identify and trace the history of dominant discourses, followed by an analysis of how they have shaped society (Peck, 2009, 2010).

Identity and Differing Ideas of Progress

The concept of progress is integral for understanding history and has been fundamental in shaping historical narratives (Seixas, 1996). However, one of the most difficult aspects of understanding the concept of progress (and its related concept, decline) is that certain groups of people might experience similar situations differently, even from within the same society and at the same moment in time.

As noted earlier, Barton and Levstik (1998) contend that some students use vernacular histories to deal with ambiguities in their historical consciousness.

They found that this was particularly apparent when students from different identity groups tried to deal with discrepancies between the US's "official" history of racism and the students' actual lived experience of it. Some European American students recognized "that the history of expanding opportunities was neither smooth, uninterrupted, nor finished" (p. 492), however it was the minoritized students in this study who were more likely to introduce "a more complex analysis of progress in extending rights to marginalized people" (p. 492). Epstein (1998, 2000, 2001) found congruous results in her work with European American and African American high school students.

The minoritized students in Barton and Levstik's (1998) study may not have had as many opportunities to challenge dominant narratives of progress as might have otherwise been possible. On several occasions, the authors note that the minoritized students dropped out of the conversations when challenged by a student from the dominant cultural group and either did not contribute further or contributed only minimally to the rest of the interview. This has significant implications for future work in terms of how students are grouped together for interviews or small group tasks, and how the interviewer handles such challenges.

In Barton's (2005) comparative study of students in Northern Ireland and the US, identity shaped students' ideas about progress as well. For example, while U.S. students tended to select events that led to the development of their nation, both Protestant and Catholic students in Northern Ireland identified with events that, in their minds, had blocked their nation's progress. In addition, more Catholic than Protestant students in Northern Ireland selected events that focused on rights, fairness, and equality. For Catholic students in the study, the need for rights and fairness was tied directly to their sense of national identity. This is how they have grown up feeling and belonging—these issues are still unresolved: "The quest for a society that treats Catholics fairly and equitably, and respect for those who have fought for such a society, are themes often considered fundamental to Irish Catholic national identity" (Barton, 2005, p. 27).

Unresolved feelings connected to rights and fairness are themes that resonated in the student narratives collected and analyzed by Létourneau and Moisan (2004). Working with Quebecois university students, these authors discovered that the Quebecois identity is located in a narrative of "if only"—not quite decline but certainly not progress. For this particular sample, the students' identity fits within the *imagined community* (Anderson, 1991) of Quebec, not Canada. Létourneau and Moisan (2004) contend that "young people's original narrative cores, discursive conventions, basic matrices, metaphors, and structures for decoding and encoding will eventually be brought into question at university, as their initial concepts gradually split apart and dissolve, opening up the way to new *narrative possibilities*" (p. 121; emphasis in original).

Identity and Conceptions of Historical Significance

Many studies that pay attention to students' national, ethnic, and Indigenous identities are concerned with the concept of historical significance. Lévesque (2005) argues that historical significance and identity are already highly connected concepts:

> Teachers, students and people in general, no less than historians, confront the study of the past with their own mental framework of historical significance shaped by their particular cultural and linguistic heritage, family practices, popular culture influence, and last, but not least, school history experience. (para. 2)

Lévesque's study with Francophone and Anglophone high school students in Ontario found differences in both the events chosen by students in each linguistic group and the criteria used to determine the significance of the events. Anglophone students did not typically rank Francophone events high on their list of significant events, instead focusing on events that reflected Anglophone history and identity. The opposite was true for the Francophone students—they had more invested in events that predominantly featured Francophone history and identity, such as the Franco-Ontarian Resistance or the 1995 Referendum. In terms of criteria used to ascribe significance, Anglophone students tended to use disciplinary criteria whereas Francophone students used more personal criteria such as *symbolic significance* and *intimate interests*. Lévesque (2005) posits that Francophone students "were more likely to use 'intimate interests' than Anglophone students precisely because the minoritized culture in which they find themselves endorses such connectedness to the collective past—a Canadian past that was traditionally taught by British Canadian authorities" (para. 15). In other words, the Francophone students in his study ascribed significance as a function of—or an expression of—their Francophone identity.

Levstik's (1999) study with Maori and European (Pakeha) students was one of the first to explore the connection between students' national, ethnic, and Indigenous identities and their understandings of historical significance. Levstik collected data following the same interview protocol established in the Barton and Levstik (1998) study mentioned above. Levstik chose 23 pictures representing various components of New Zealand's history and spanning some 3,000 years. Students between the ages of 11 and 13 worked in small groups and were asked to decide together "which eight [pictures] were important enough to include on a time-line of New Zealand history" (p. 6). Levstik then interviewed the students to probe their understandings of historical significance.

Among other findings, Levstik (1999) found that there was a difference in Maori and Pakeha perceptions about the fairness and historical significance of the Treaty of Waitangi. Pakeha students viewed the treaty as an instrument for the fair distribution of land, whereas the majority of Maori students saw it as a struggle over land that was rightfully theirs in the first place and an "opportunity lost to greed" (p. 12) that resulted in the land being wasted by the Pakeha. Maori students were less interested in land claims than their Pakeha counterparts and wished, simply, to continue to develop their relationship to the land. Whereas Pakeha students saw the treaty as a current component in their continued understanding of New Zealand history, Maori students located the treaty in their past. Levstik's study reveals that, for these students, ascribing historical significance required a constant negotiation with their own identities, their country's past in and of itself, and their country's past in relation to the rest of the world.

In a study comparing conceptions of significance among eighth-grade students in England and the US, Yeager, Foster, and Greer (2002) found evidence to support the contention that “class, race, family history, popular culture, the media, and other social and cultural forces are important influences” (p. 202) that affect students’ understanding of history, including historical significance. Yeager et al. (2002) interviewed students to assess their prior historical knowledge, had students generate a list of the 10 most significant events in the 20th century (and explain the most important one on the list), and then had students choose and rank 10 significant events out of a list of 47 from a researcher-generated list. Most of the English students’ choices reflected their English background and this seems hardly surprising. However, some students were “influenced by their own cultural upbringing” additional to their national background (p. 207). For instance, for one student whose father lived in Iraq, the Iran–Iraq war was considerably significant. For another born in South Africa, the end of apartheid was significant. In these cases, ethnic, cultural, and/or national identity played a key role in determining the significance of the events for these students.

Identity was important for the U.S. students in Yeager et al.’s (2002) study as well. While their “choices were somewhat less culture bound than the English students’” they tended to view events “in terms of American involvement or effects” on the world (p. 209). Like the students in Barton and Levstik’s (1998) work, these students also used pronouns such as “we,” “our,” and “us” when referring to the history of the US, thus making clear their identification with and claim to the history of *their* country.

Protestant and Catholic students in Northern Ireland also identify with the complicated and often violent history of their country. As Barton and McCully (2004) discovered, however, students from these two religious groups identify with different aspects of Northern Irish history, and this has important implications both for the students’ identities and for history teachers in the country. This study aimed to examine students’ “constructions of historical themes or concepts and the connection they made between those and their own identities” (p. 6). Data were collected through a picture-sorting task, usually with pairs of students ranging in age from 11–14 years. The students were asked to arrange the pictures into groups in a way they thought made sense and then explain their method of organization to the researchers. Then the researchers asked the students “which of the categories, or which individual pictures, ‘have the most to do with you or who you are’?” (p. 8). This questioning was an attempt to elicit the students’ understanding of “identify with” without using that exact phrase (for the reasonable fear that the phrase would confuse students).

Several important findings emerged from Barton and McCully’s (2004) study, the first being that, although students often identified with pictures “that related to their national, religious, and cultural backgrounds,” their “responses contradict any simplistic generalizations about their historical identifications” related to these themes (p. 23). In fact, what might surprise most readers of this work is that the vast majority of students’ responses “involved identification with events other than those related to Protestant/Unionist or Catholic/Nationalist history” (p. 23). Notably, “this study suggests that history educators need to examine more closely the unintended consequences of their choice of content, particularly

the ways in which students from diverse backgrounds may interact differently with the same curriculum" (p. 27).

Conclusion

The research reviewed above has pushed the field to recognize that students do not simply absorb any historical narrative or interpretation transmitted in school but filter them through their own identities and backgrounds. The task for history educators now and into the future is to help students to become aware of the lenses through which they approach the study of the past and to help them negotiate what Seixas (1997) calls "the 'subjectivist'—'objectivist' split" (p. 26): a negotiation that requires students to connect personal historical narratives informed by their identities and backgrounds to larger historical stories.

A flaw in much of the previous research on ethnic identity and students' historical understandings is that students have not been asked to describe their ethnic identity in any detail, nor have they been asked to consider how their ethnic identity may have impacted their understanding of history. As reviewed above, some researchers have analyzed student data using a comparative format to examine differences in students' historical understandings between, for example, Maori and Pakeha students in New Zealand (Levstik, 1999), students in Britain and Spain (Cercadillo, 2001), Francophone and Anglophone Ontarians (Lévesque, 2005), and Protestant and Catholic students in Northern Ireland (Barton & McCully, 2004). However, an in-depth exploration of students' ethnic identities (beyond a general description of what it might mean to be Protestant or Catholic in Northern Ireland, or Francophone/Anglophone in Ontario, for instance) is lacking in previous work. Ascribing students to large demographic categories, particularly (but not only) in the case of students' ethnic, cultural, or Indigenous identities, ignores the diversity within these groups.

Moreover, making assumptions about students' identities and failing to encourage student agency in the research process leads to inaccurate generalizations about the complexity of students' identities and does a disservice to students. History educators interested in questions of identity and students' historical understandings must employ research methodologies that will more explicitly investigate how identity, and in particular ethnic identity, shapes these understandings. These methodologies should be informed by theoretical work on ethnic identity and attend to the fluid, layered, and context-dependent nature of students' ethnic identifications. In my own work (Peck 2009, 2010), I attempted to address this methodological shortfall by bringing students' own polysemous definitions of their ethnic identities into dynamic interplay with their historical thinking.

> Historical thinking provides students with a means to not only construct historical narratives, but also to sift through the layers of identity that influence their own understandings and interpretations of history.… Thus, historical thinking, with an explicit focus on identity, can lead to a shared quest for understanding from where the other person speaks. (Peck, 2009, p. 71)

My strategy is one example of a methodological innovation. VanSledright, Kelly, and Meuwissen (2006) counsel that no method for collecting biographical information is completely foolproof but insist that "the effort must be made, as a means of providing some sociocultural context within which to situate" the data (p. 227).

While this area of research has grown exponentially over the past two decades, much work remains to be done. In addition to developing richer methodological approaches that will better attend to students' complex identities, studies that explore the relationship between students' identities and their historical understandings from ethnic and cultural perspectives not yet explored would make an important contribution to the field's understanding of this complicated issue. There is precious little research with Indigenous students in particular. There are many complex reasons why this is so, and space does not allow an exploration of these here. Researchers wishing to explore this line of work are advised to recognize, respect, and be guided by the diverse protocols and processes appropriate to conducting research in Indigenous communities and with Indigenous peoples (Donald, 2009; Marker, 2003; Pidgeon & Hardy Cox, 2002; Tuhiwai Smith, 2008).

Although broad generalizations from research into the relationship between students' ethnic, national, or Indigenous identities and their understandings of history are difficult, despite this constraint there is much the education community can learn about the theoretical and practical implications of this work—including the importance of creating "a culturally appropriate and responsive learning context, where young people can engage in learning by bringing their prior cultural knowledge and experiences to classroom interactions, which legitimate these, instead of ignoring or neglecting them" (Bishop & Berryman, 2006, pp. 264–265). We know from the research reviewed in this chapter that youth negotiate multiple identities and historical narratives, and many do so in sophisticated ways. History educators can and should help students do this, but we must respect and attend to the complexity of the endeavor.

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13

Gender and Sexuality in History Education

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At the start of the 21st century, Crocco (2001) highlighted "the missing discourse about gender and sexuality in the social studies" (p. 65). Attention to these topics has grown with the field since then, but only marginally. Research on the teaching and learning of gender and sexuality within history education has grown slightly over the years since the last handbook in social studies (Crocco, 2008), but has not kept or caught up with research on these topics within the academic field of history.

Before considering the differences in treatment of gender and sexuality by history as opposed to history education, a few definitions may be helpful. When Scott (1986) called gender "a useful category of historical analysis" (p. 1053), she highlighted the distinctions societies make between the roles and statuses, capacities and predilections of men and women. These have differed over time and place. The cultural elaboration of the biological differences rooted in sex is so pronounced that anthropologist Ortner (1996) wrote about "making gender" in her book of that name, pointing to the now familiar notion of the social construction of gender. As Western feminists wrote about social construction, they were encouraged to avoid essentialism (Spelman, 1988), consider depictions of non-Western women (Mohanty, 1991), take into account the connections between sexuality and gender (Butler, 1990), and interrogate the very meaning of the social category, "woman" (Young, 1997).

As gender analyses outside the West contributed to debate about the concepts of women/men, gender, femininity/masculinity, and female/male, social scientists and historians emphasized the cross-cultural and historical variability in these roles. For example, Stearns (2015) provides an overview of gender in world history:

> Historians have shown the great variety of definitions of femininity and masculinity, and how these related to the ways societies function not only in family life, but also in political institutions and economic activities.

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> They have examined how recommended gender standards influence actual behavior, though also how, in many societies, many individual men and women insist on different patterns. And they have explored how gender standards can change—as in the revolution in women's work roles, in Western Europe and the United States, during the past half century. (p. 1)

Stearns (2015) goes on to caution against imposing Western norms onto non-Western cultures in dealing with gender:

> Evaluations … assume that relative equality between the sexes is a "good" thing, which is a modern and not uncontested value.… Current Western feminist definitions are important but they are not the only measure. Some systems that seem oppressive by modern Western standards may have worked very well (and, in truth, inequality may "work" sometimes, too, even for subordinate groups). (p. 1)

For the purposes of this chapter, Freedman's (2002) definition of feminism will be used, acknowledging that the stance reflects Western norms: "a belief that women and men are inherently of equal worth. Because most societies privilege men as a group, social movements are necessary to achieve equality between women and men, with the understanding that gender always intersects with other hierarchies" (p. 5).

As with gender, considerations of sexuality emphasize historical and cross-cultural variability. Nye (2004) comments,

> Though historical accounts of sexuality, particularly in the West, clearly confirm the prevalence of dimorphism and gender difference, much recent work has opted in favor of far more complex schemes for understanding sexual and gendered bodies and practices in the West and elsewhere.… Third sex and third gender models and even more complicated schemata have been developed recently to account for the great diversity of body types, gender identities, and sexual practices in the West and throughout the world. (p. 11)

Stryker and Whittle (2006) describe the status of being transgender in these terms:

> What began as a buzzword of the early 1990s has established itself as a term of choice … for a wide range of phenomena that call attention to the fact that "gender," as it is lived, embodied, experienced, performed, and encountered is more complex and varied than can be accounted for by the currently dominant binary sex/gender ideology of Eurocentric modernity. (p. 3)

In a wonderful compendium of resources on teaching about gender and sexuality in schools, Butler-Wall et al. (2016) provide a definition of transgender as: "an umbrella term for a wide range of people whose gender identity or expression

differs from conventional expectations based on their assigned biological birth sex" (p. 448).

Finally, a few words are necessary concerning the term "queer" as it appears in the humanities (Abelove, 2003) and social science research (Fotopoulou, 2013) far more commonly than in social studies (Schmidt, 2010, 2014a). Recognizing that the word can be used as a verb, that is, "to queer" or trouble something, literary scholar Marcus (2005) defines the noun in this fashion:

> *Queer* has become a compact alternative to *lesbian-gay-bisexual-transgender*, but it also emphasizes affinity and solidarity over identity.... I use *queer* to refer to this deliberately loose, inclusive association. Like the postmodern turn in feminism, the adoption of *queer* issued a reminder that complex identifications and differences undermine identity. But despite the fanfare that heralded queer theory as an advance over lesbian and gay studies, usage has not affirmed any firm distinction between *queer* and *lesbian and gay*. While *queer* foregrounds the belief that sexual identity is flexible and unstable, *gay* and *lesbian* do not assert the contrary. (p. 196, emphasis in original)

Although this definition has been contested (Berlant & Warner, 1995), it points to the term's resistance to "a stable referential content and pragmatic force" (p. 344), pushing boundaries and challenging assumptions and expectations, especially about categories, whether they be ontological or moral.

History and History Education

If we consider history education as one means by which nation-states can promulgate a narrative that supports their self-identity for successive generations (Epstein, 2008; Mak, 2007), then the linkage between history education and citizenship education must also be considered in thinking about the silences or stories regarding gender and sexuality within that narrative. Are the lives of women and those who are lesbian, gay, bisexual or transgendered seen as significant to history (Barton, 2005)? What messages do we send if women are left out (Chiponda & Wassermann, 2015b)? And does the nation's story imply that "all the women are white, all the men are black" (Hull, Bell-Scott, & Smith, 1982, p.1)? One might also ask whether the elision of attention to sexuality in schooling suggests to students that all the significant historical actors in the nation's past were straight. As Sleeter and Grant (2011) note, images presented to children through textbooks are representations of the "normal" in society. Thus, both inclusion and exclusion in textbooks convey messages to students about their worlds.

In countries like the United States where the purposes of schooling have long been tied to citizenship, it is not surprising that school history is different from academic history. In England and continental Europe where citizenship and the teaching of history have not been so closely intertwined (Osler, Rathenow, & Starkey, 1995; Siim, 2000), the relationships between school history and

academic history have arguably been closer. In the US, where state laws mandate regular engagement with U.S. history, these norms reflect the importance of educating citizens for democratic engagement (Thornton, 2005). The Canadian relationship of school history to the discipline (Clark, 2013; Cutrara, 2009) may be closer to that found in Great Britain (Low-Beer, 2003), where, until recently, citizenship aims of schooling have been less well-defined. Concerns with equity of representation have been taken up in places like South Africa (e.g., Chiponda & Wassermann, 2015b), where history education as a tool for forging national identity has surfaced recently (Yilmaz, 2007). Nevertheless, at some level in all cases, the disconnection between academic and school history is purposeful, given the differing aims of education for the population served at the K-12 level, all of whom require citizenship education, and in postsecondary education, where the aims and audiences are narrower (Thornton & Barton, 2010).

Many other factors contribute to this divergence in aims. First, since the 1990s the curriculum standards movement in education has driven educational reform efforts in the US. From debates over history standards to more recent controversies over the Common Core and the Advanced Placement U.S. History test (Schneider, 2011; Urist, 2015), the trend has been toward mainstream topics. By contrast, historian Himmelfarb (2004) once commented that academic history had moved the margins to the center of history, and the center to the margins, referring to the rise of social history and the decline of political, economic, military, and intellectual history. Although many historians felt that change in the discipline was long overdue (Coughlin, 2007), others lamented what they believed was lost in the ascendancy of attention to race, class, gender, and social history (Gordon, 2013).

Second, the confluence of a changing demographic mix within the US over the past 50 years along with rising interest among scholars in "forgotten histories" heightened attention to what used to be called "ethnic studies": African American history, Mexican American history, Chinese American history, Japanese American history, and so on. At the same time, sociocultural global contexts, especially as a result of decolonization, were changing, bringing greater attention to postcolonial and subaltern studies (Anzaldúa, 1987; Prakash, 1994).

New research emerged in traditional professional organizations and their publications, such as the *Journal of American History*, *American Quarterly*, and the *American Historical Review*. More specialized journals such as the *Journal of Negro History* (now renamed as the *Journal of African American History*) and the *Hispanic American Historical Review* arose. The explosion of research on gender and sexuality produced new outlets such as the *Journal of Women's History*, *Signs*, and *Women's Studies Quarterly*, among others, and in 1990, the *Journal of the History of Sexuality*, contributing to the distance between academic and school history.

Third, the school history curriculum has been affected by national educational policy changes that have shifted control over curriculum from the state to the federal level (Mehta, 2013). The No Child Left Behind legislation of 2001 brought increased testing in schools and narrowed the curricular focus to literacy and

numeracy, reducing the time spent on social studies (Fitchett, Heafner, & Lambert, 2014). Likewise, promotion of the Common Core by the Council of Chief State School Officers (2010) further marginalized the social studies by positioning the study of history as a handmaiden of literacy.

Cumulatively, these factors have contributed to the "missing discourse of gender and sexuality" in school history (Crocco, 2008, p. 65). Nevertheless, continued work by established scholars and a cadre of new scholars is a promising sign.

Conceptual Framework

Three conceptual frameworks for assessing the relationships among history education, gender, and sexuality include: (1) knowledge transformation, (2) multiculturalism, and (3) citizenship education, which together situate this chapter within the broader landscape of epistemological and theoretical shifts in education. Over the past half century, many academic fields have undergone what Minnich (2004) describes as the process of *transforming knowledge*. Shifting epistemological and methodological approaches and standards for *historical significance* have been accompanied by considerations of the role of sociocultural identity markers such as *positionality* and *situatedness* in knowledge production. Debates over these issues altered the assessment of the "canon" in English literature (e.g., hooks, 2000; Sedgwick, 1990). In history, the movement for "history from the bottom up" expanded the field in terms of topics deemed significant for research and teaching (Scott, 1986, 1989). Sociology has challenged the exclusions as well (Collins, 1991). In educational research, these and related ideas also had an impact, albeit a belated and partial one (Asher, 2015; Banks, 2016; Ladson-Billings, 2016; Thayer-Bacon, Stone, & Schrecker, 2013).

In K-12 schooling, the impact of multicultural education began to be felt in the 1990s, at least as measured by the introduction of "sidebars" featuring prominent women or men of color to textbooks. At that time, many publishers marketed high school history textbooks in the US as "multicultural," just as today they promote textbooks' alignment with the Common Core. During this decade, the value of diversity became more widely accepted in academic culture, business, and society more generally (Glazer, 1997).

Exploring the impact of diversity on notions of "American heroes," Wineburg and Monte-Sano (2008) asked, "Have changes in curriculum materials made a dent in popular historical consciousness? Whom do contemporary American schoolchildren define as the people 'who made history'?" (p. 1188). The authors describe "the opening up of history to the previously unstoried," and document schoolchildren's assessment of "famous Americans," a list that includes Martin Luther King, Jr., in first place, with Rosa Parks, Harriet Tubman, and Susan B. Anthony in second, third, and fourth places (p. 1191). Only in fifth place does a more traditional figure, Benjamin Franklin, appear on the list. Researchers also investigated adults' views on famous Americans and found considerable overlap with the names given by schoolchildren. The authors' concluding remarks suggest the degree to which multicultural considerations had made their way into what they call "the cultural curriculum":

> The cultural curriculum takes many courses, some running in opposite directions, others crisscrossing madly, and still others resembling parallel lines that stubbornly refuse to meet. But when the courses of this curriculum do meet and we can discern trends coming from different directions and echoing from varied quarters, the cultural curriculum's effects become most powerful. Above all, the cultural curriculum reminds us not to confuse schooling with education: the latter being, in Bernard Bailyn's words, "the entire process by which a culture transmits itself across generations." (p. 1197)

The cultural curriculum reflects a nation's sense of self (Epstein, 2008) through the narratives circulated in school, popular culture, and other vehicles that socialize youth to the "origin stories" of their society (Woodward, 1960). In the US, national self-identity is tied to democracy and freedom (Foner, 1998), exceptionalism (Schuck & Wilson, 2008), and the "quest for inclusion" (Shklar, 1991). Introducing more diverse perspectives on the national narrative, ones based in gender, race, and sexuality differences, challenges these concepts and contributes to the contestation over history education in the US.

Progress toward inclusion remains aspirational for many groups in the US. The achievement of full citizenship status has been a long and incomplete process for women (Kerber, 1998) and others (Glenn, 2000; Ngai, 2003). Access to voting, the chief prerogative of citizenship, has ebbed and flowed over time (Keyssar, 2000), while the forces for broader social and political inclusion of groups defined by their ascriptive identity attributes have waxed and waned (Smith, 1997, 2001). As Smith (1997) points out, "neither the possession nor the fresh achievement of greater equality can guarantee against later losses of status due to renewed support for various types of ascriptive hierarchy" (p. 471). Race, ethnicity, gender, and sexual orientation (Crocco, 2000) remain salient to the rights of citizens in the US, and this reality manifests itself in various ways in history education.

Likewise, the manner in which education for democratic citizenship has been enacted has shifted over time. Going back to Dewey's (1916) formulation of democracy as a way of living, ambivalence about diversity is apparent, even among progressive educators who gave diversity a limited place in their ideas (Fallace, 2010). Whatever the case concerning Dewey's relationship to the "dilemma of race," issues of identity have become more salient considerations within the educational project in the late 20th and early 21st centuries (Feinberg, 1998; Noddings, 2013; Parker, 1996).

In sum, the changes incorporating gender and sexuality into school history over the last several decades have largely been token attempts to include these groups in a national narrative focused on political and economic change. Concomitantly, research on gender and sexuality within history education has been more limited than research directed at other topics.

Scope of Review and Methodology

Because chapters on gender and sexuality research in social studies education were published about a decade ago (Crocco, 2008; Hahn, Bernard-Powers, Crocco, & Woyshner, 2007), this review concentrates on recent research within

the subfield of history education rather than extending the analysis back several decades. The focus was further delimited by omitting research on the history of education or practitioner-oriented articles on teaching women's history, although a few of these will be mentioned. Instead, the chapter focuses on research on gender and sexuality as this relates to teaching and learning history, curriculum, and tools such as textbooks.

The search strategy included educational, humanities, and social science databases, along with Google Scholar, using these terms: *gender*, *sexuality*, *queer*, *gay*, and *lesbian*, along with *history*, *history education*, *history teaching and learning*, *social studies*, and *social studies education*. One limitation of the material covered here may be that chapters in edited volumes are harder to unearth. Although the chapter aims to be international in scope, much of this review focuses on North American and English-language contexts.

Websites on teaching were reviewed as bellwethers of the degree to which research about gender and sexuality has spread to history teaching and learning: *Facing History and Ourselves*, the Gilder Lehrman Society, the *Choices* curriculum program, *Teaching for Tolerance*, the National Women's History Project, and materials produced by the World History Association, American Historical Association, Organization of American Historians, the American Studies Association, the National Women's History Project, and the National Women's Studies Association.

History Education and Gender

Educational researchers have documented the ways in which attention to women's history has been overlooked, trivialized, "token-ed," and "sidebarred" in textbooks. Studies dating back to the 1970s and 1980s emphasize the point that omission of women's roles, stories, and contributions undercuts women's significance to American and world history. During the late 20th century, scholars provided multiple approaches for infusing gender into teaching history and other school subjects, or what is sometimes called "gender balancing the school curriculum" (see, for example, Crocco, 1997, 2000, 2001).

With the emergence of these models, researchers also investigated the degree to which inclusive approaches had an impact on student performance—for example, looking into how young women performed on standardized achievement tests (Hahn et al., 2007). Recent research includes several studies of American history textbooks (Clark, Allard, & Mahoney, 2004; Schrader & Wotipka, 2011) and world history textbooks (Clark, Ayton, & Frechette, 2005; Crocco, 2007; Harris, 2012), which build upon earlier comparable reviews (e.g., Osler, 1994). Similar studies have addressed the inclusion of women in textbooks outside the US, in Korea (Kim, 2006), South Africa (Chiponda & Wassermann, 2015b; Fardon & Schoeman, 2010; Schoeman, 2009), Malawi (Chiponda & Wassermann, 2015a), Ontario (Maroney, 2016), Europe (Schissler & Soysal, 2005), Russia (Muravyeva, 2006), and Pakistan (Ullah & Skelton, 2012). Widespread interest in textbook studies internationally (e.g., Nicholls, 2006) suggests that this trend will continue.

A number of articles focused on various aspects of women's history have appeared in social studies journals, such as the history of clubwomen (Woyshner, 2002), women in the Progressive Era (Williams & Bennett, 2016), and women as agents of change (Montgomery, Christie, & Staudt, 2014). Berkin, Crocco, & Winslow (2008) edited a volume that provides syntheses for nonspecialists in women's history, including suggestions for pedagogical approaches. Other publications have addressed the status of women in world history (Crocco, 2010), the Middle East (Crocco, Pervez, & Katz, 2009), and England (Pearson, 2012), and in relation to human rights (Bajaj, 2011; Crocco, 2007; Osler, 2009, 2011).

For elementary-age students, scholars have drawn upon the burgeoning literature in academic women's history to provide ideas appropriate for teaching women's history to younger children (Brugar, Halvorsen, & Hernandez, 2014; Christensen, 2005; Libresco & Balantic, 2013; Montgomery et al., 2014; Sheffield, 2014). Although a few scholars have suggested that interest in gender in elementary school is on the wane (e.g., Galman & Mallozzi, 2012), related issues are emerging, for example, bullying. Since bullying is often linked to race, class, and sexuality identity markers (Juvonen & Graham, 2014; Kohli, 2016), attention to gender and sexuality as causal factors may persist.

The growing body of work in women's history has challenged earlier interpretive frameworks, such as the public/private sphere distinction; first-, second-, and third-wave periodization of the women's rights movement (Hewitt, 2010); and exceptionalism in U.S. women's history (Winslow, 2004). This work reflects the need for *intersectionality* in women's history (Collins, 1991), that is, the interaction of identity attributes (typically race, class, and gender, but also including sexual orientation). Many argue that intersectionality has received insufficient attention in the field of women's history writ large (Ball, 2008). Nevertheless, two articles have analyzed the depiction of African American women (Schocker & Woyshner, 2013; Woyshner & Schocker, 2015) in history textbooks.

Several dissertations on gender have appeared over the last 10 years, although not specifically about history education. Bickford (2009) examined "masculine themes" within the media production of a seventh-grade social studies classroom. Engebretson (2012) wrote about preservice teachers and their views on gender; Gunel (2007), about Muslim girls' experiences in social studies classrooms. Schmeichel (2009) examined the "doing of gender in social studies," work which led to several articles related to gender (2011, 2015) including an analysis of how teachers bring representations of women into their lesson planning (Schmeichel, 2015). Schmidt's dissertation (2008) raised intriguing questions about the intersection of gender with place; her subsequent work (2010, 2014a, 2014b) has added significantly to the field's consideration of both gender and sexuality, as has that of Engebretson (2013, 2015, 2016). Scheiner-Fisher's dissertation (2013) tackled the inclusion of women's history in secondary history classrooms. Using a variety of research methodologies, including survey, interview, and classroom observation, she found that, although almost all teachers claim that they are including women's voices in their curriculum, the degree to which they did is low, scarcely more than 10% of teaching time. Moreover, women's significance in the past is calibrated almost exclusively in terms of masculinist "norms of greatness" (Scheiner-Fisher, 2013, p. 141).

Investigating historical agency in another dissertation, Colley (2015) used second-wave feminism for her research. She worked with high school seniors as they studied feminism, which they found controversial. Among the goals of her research was an interest in using the concept of historical agency to foster greater awareness of gender inequities and civic action. While acknowledging the ongoing inequities between men's and women's status in this country, students supported a narrative of progress in women's rights even though they found it difficult to articulate the mechanisms of agency and causation accounting for that progress.

Researchers (e.g., Bair, 2008; Hickey & Kolterman, 2006; Sincero & Woyshner, 2003) continue to comment on gendered exclusion in the curriculum and to offer suggestions for inclusion. Analyses of gender balancing the curriculum have appeared for both U.S. history courses (Frederickson, 2004; Kern & Levstik, 2012; Schafer & Bohan, 2009) and world history courses (Harris, 2012). Epstein and Shiller (2005) have reviewed research examining the intersection of race, culture, and gender with teaching and learning national history. They find differences in students' perspectives and achievement based on sociocultural identity attributes. Others (e.g., Salinas, Rodríguez, & Lewis, 2015; Sheppard & Mayo, 2013; Stanton, 2015) have considered the complex place of sociocultural identity attributes in teaching and learning history.

Levstik (2009, 2016) has provided two trenchant synthetic reviews of what we know and don't know about gender as it relates to teaching and learning history.

> Although some studies include gender in their analyses, few note significant differences in male and female performance. On the other hand, the few studies that focus primarily on gender, usually in the context of women's history, note differences in how students respond to explicit attention to gender. (Levstik, 2016, p. 113)

One of the ways in which attention to gender enters history classrooms is through primary sources, which play an increasingly prominent role in secondary schools, and to some extent at the elementary level. Librarians have published suggestions for appropriate sources when teaching about certain topics such as war, where women's contributions get overlooked (Crew, 2008). Other scholars (Fournier & Wineburg, 1997) have investigated the ways in which children picture themselves in the past, examining gender differences, while other scholars have investigated the ways in which women (Woyshner, 2006) have been represented. McGrath (2014) sees the problem as systemic rather than localized, arguing for greater consideration of women's voices and stories by states engaged in curriculum reform.

Scholars have added new lines of investigation into gender. Work on gender and history now includes considerations of masculinity and teaching world history (Dunn, 2000; Meade & Wiesner-Hanks, 2008; Northrup, 2005; Stearns, 2009, 2015; Wiesner-Hanks, 2007; Zook, 2002). These investigations have spread outside North America (Baildon et al., 2016; Berges, 2013; Harris & Burn, 2015; Harris, 2013; Levstik, 2009; Rantala, Manninen, & van den Berg, 2015).

Retrospective analyses continue into "old histories and new canons" (Grever & Stuurman, 2007, p. 1) in including women (Mak, 2007) with new work on colonialism from a gendered perspective (Legene & Waaldijk, 2007). Researchers have taken up again questions about gender differences in student interest in studying history (Grever, Pelzer, & Haydn, 2011) and academic performance in history (Oppong, 2013).

Work on men and masculinities in other fields relates to history, for example, sociology (Kimmel, Hearn, & Connell, 2005; Martino, Kehler, & Weaver-Hightower, 2009) and social studies (Kincheloe, 2001). Educational scholars have brought attention to "the boy crisis" (Howard, 2008; Lynn, Bacon, Totten, & Bridges, 2010; Weaver-Hightower, 2003) in educational achievement. This crisis has deep historical roots. Scholars are working to unpack the multiple reasons accounting for the place of Black and Brown male students in schools (Brown, 2011). The problems cited include the effacement of Black history in textbooks (Brown, 2014; King, Crowley, & Brown, 2010), the paucity of teachers of color in U.S. schools (Brockenbrough, 2012; Busey & Waters, 2016), and absence of "gender relevant pedagogy" (Bristol, 2015).

Another overlooked area is the history of gender and religion. Although this topic is widely considered by world historians in relation to culture and history (e.g., Meade & Wiesner-Hanks, 2008) and to sexuality (Nye, 2004), very little research has appeared in social studies education dealing with this topic, with a few exceptions (Asher, 2005, 2014; Crocco et al., 2009; Sensoy & Marshall, 2010).

In sum, research on gender and history education research has ebbed and flowed over the past several decades. Interest in men and masculinities as well as in the intersectionality of race, class, and gender remains a novelty in history education research. Nevertheless, there are signs of interest (e.g., Garrett, 2015; King et al., 2010; Shear, Knowles, Soden, & Castro, 2015) in these topics, especially in terms of how school history curriculum gets shaped, what gets memorialized, and what gets left out.

Identity Politics and Research on Sexuality Within History Education

Some scholars have argued that it is a controversial undertaking to "teach what you're not" (Mayberry, 1996, p.1). It may also be controversial to "research" or "write" about "what you're not." With this in mind, it may be appropriate to position myself as author in relationship to the topic of sexuality.

In keeping with the classical feminist tradition of identifying one's positionality in relationship to a topic, I acknowledge that I write about the research on sexuality within history education as a heterosexual woman whose life experiences do not provide an insider's perspectives on the ways in which gay, lesbian, queer, and transgendered topics have been addressed. Likewise, I identify as a cis-gender female whose pronoun choice is the classical she/her/hers formulation.

In a recent article concerned with epistemological transitions in social science, Banks (2016) revisits the question about an author's standing in teaching, researching, or writing about topics not matching their own sociocultural

identity. At one level the issue seems self-evident, that is, scholars write about others' experiences all the time; in fact, historians write about long-ago peoples and societies whose experiences are far removed in time from their own. Similarly, anthropologists write about the experiences of remote societies or distinctive subcultures within their own society. For both groups, their "outsider" status has been seen to provide a more "objective" position from which to perceive and describe a phenomenon. Nevertheless, poststructuralist and postmodernist discourses have challenged the very notion of objectivity and placed subjectivity in a different relationship to scholarship. It might be useful to emphasize the obvious: that we are all limited by our positionality, that is, the convergence of personal identity attributes and biographies.

My outsider status as the author of this chapter may or may not make a difference to readers, but it seems appropriate to self-identify given the identity politics implicated in writing about "what you're not," whether it involves writing about Black women academics (Crocco & Waite, 2007; Waite & Crocco, 2004), Muslim women (Crocco, 2006), or gay and lesbian students (Crocco, 2001, 2002). Raising these issues is, of course, quite pertinent to this chapter. Some argue (Khor, 2007) as to whether identity attributes ought always to be interrogated at a time when gender has been conceptualized as performative (Schilt & Westbrook, 2009; Segal, 2008) rather than as an historically or ontologically fixed identity (Fotopoulou, 2013; Scott, 2001). This issue also touches on other matters pertinent to history education such as "stepping into another's shoes" (Rantala, Manninen, & van den Berg, 2015), historical empathy (Endacott, 2010; Endacott & Brooks, 2013), or "speaking for others" (Alcoff, 1991). Issues of representation, discourse, and identity are at the heart of what we do as scholars, teachers, and teacher educators, but in a particular way when dealing with gender and sexuality.

As is the case with gender, academic history has devoted greater attention to sexuality than has history education. For example, a prominent book on the history of sexuality (Emilio & Freedman, 2012), used widely in college classrooms, is now in its third printing. Two recent books have already refined previous interpretations of the gay liberation movement as part of the overall civil rights movement in the US (Downs, 2016; Faderman, 2015). Transnational histories of sexuality are beginning to emerge (see, for example, the 2009 issue of *American Historical Review* and the *Journal of the History of Sexuality*). Publication of a transgender studies reader (Stryker & Whittle, 2006) provides another token of the spread of works related to this field of inquiry.

Within social studies broadly, several scholars have taken up sexuality as it relates to citizenship education but not with specific reference to history education. Among the scholars whose work has been the most abundant in this area are Bickmore (1999, 2002, 2011), Mayo (2007, 2008, 2013, 2015, 2016), and Schmidt (Schmidt, Chang, Carolan-Silva, Lockhart, & Anagnostopoulos, 2012; Schmidt, 2010, 2012b, 2014a) in the US, and Loutzenheiser (Loutzenheiser & MacIntosh, 2004; Loutzenheiser, 2006, 2014) in Canada. In Western societies outside North America, research related to sexuality and schooling has often emerged through the context of human rights education (Osler, 2015), and there are related efforts underway to combine human rights education with history

education in Europe (Lenz, Brattland, and Kvande, 2016) and in India (Bajaj, 2011), especially in contexts concerned with global citizenship.

Scholars working on sexuality and social studies offer a variety of epistemological and methodological approaches in their research, among them: work on critical theory and postmodernism in social studies (Segall, 2013, 2014); questions about LGBTQ students and self-efficacy (Brant & Tyson, 2016); topics related to curriculum and inclusion (Maguth & Taylor, 2014; Mayo, 2011; Rogow & Haberland, 2005; Sheppard & Mayo, 2013); concerns over the status of transgendered students in schools (Wright-Maley, Davis, Gonzalez, & Colwell, 2016); “straight talk” about sexuality in schools (Asher, 2002); topics related to political socialization, citizenship education, and queer youth (Ford, 2011); and historical representations of teaching and sexual identity (Blount, 2000).

Schmidt’s body of work on gender and sexuality is situated in the distinct disciplinary arenas of geography, history, and social studies. She has argued prodigiously for greater attention to gender and sexuality within the realms of history and social studies (Schmidt et al., 2012; Schmidt, 2012a, 2012b, 2014a, 2014b) and for equity and inclusion for both teachers and students who do not fit heterosexist normative frameworks. To take just one earlier example, Schmidt (2010) in “Queering Social Studies” calls upon the field to examine its role in normalizing citizens and sexuality. In this work her judgment reflects pessimism about the status of such issues in the field and in society. In this sense, her themes echo the “missing discourse” critique (Crocco, 2001) or Thornton’s (2003) judgments in “Silence on Gays and Lesbians in Social Studies Curriculum,” which has been reprinted widely (for example, Parker, 2015). In this article as elsewhere, Schmidt advocates placing LGBTQ issues within the long tradition of the civil rights movement in the US.

Schmidt is understandably concerned about a variety of problems in school and society regarding the status of LGBTQ students and teachers. Yet it would have been hard to predict even a few years ago that in 2015 the U.S. Supreme Court (SCOTUS) would decide in favor of gay marriage in the *Obergefell v. Hodges* case. Both the American Historical Association (AHA) and the Organization of American Historians submitted *amicus curiae* briefs in favor of the plaintiffs. (Neither the American Educational Research Association nor the National Council of the Social Studies did.) At the same time, Gallup polls (McCarthy, 2015) indicate rapidly growing support for gay rights in general, particularly among younger U.S. citizens. Despite the evidence offered by the SCOTUS decision and Gallup polling, not surprisingly these events have provoked backlash, ranging from debates over whether merchants can deny goods or services to gay couples wishing to marry (Corvino, 2015) to whether adoption agencies can deny rights to adoption to gay couples (Semuels, 2015).

These matters are already making their way into teaching in college and university history departments. The AHA has, over the last decade, raised issues in the Teaching section of its online journal, *Perspectives on History*, concerning the teaching of sex and sexuality in high school and college history classes. In one piece on high school history, a high school history teacher in Connecticut (Doyle, 2010) notes that U.S. history standards, for instance, include specific references to *Roe v. Wade* and the gay liberation movement. He goes on to say, however, that

history teachers rarely teach about the movement because they are afraid of provoking a negative reaction from parents or school administrators. Neither of the U.S. history textbooks in use at his school mentions gay liberation. Doyle (2010) concludes with a call for high school history teachers to align themselves with academic historians to ensure that topics related to sexuality get their appropriate place within the curriculum as "fundamental [aspects of] the human condition," (para. 1). Without such mobilization, high school history teachers "will continue to be forced into silence about the sexuality of people from the past" (para. 17). To facilitate greater understanding of these topics, historians have assembled edited volumes that synthesize the history of gender (Berkin et al., 2008) and LGBT groups (Rupp & Freeman, 2014) for relatively quick immersion into the literature. Once inducted and convinced of their significance, teachers may be ready to make common cause with professors to ensure more meaningful coverage of these topics in K-12 history education. Nevertheless, it is clear that change comes more slowly to K-12 history education than to the academic field of history as it is practiced in departments at the college and university level.

A college professor (Lowe, 2013) authored another article in the Teaching section of *Perspectives on History* registering his surprise that his students didn't know anything about the Stonewall Riots and wondering why this event was not being taught in college history classes. Reminded of his own encounter as a doctoral student with Scott's (1986) essay on gender as a "useful category of analysis" and her assertion that gender needed to be studied since it is a "primary way of signifying power" (p. 1068), Lowe (2013) argues that the place of sexuality in history is akin to that of gender in this regard: "The relationship between sex and power constitutes a basic dynamic of human experience that extends across all societies and times ..." (n.p.). He argues for the importance of sexuality as its own "useful category":

> Some teachers conflate sexuality with gender, and assume that if they address gender they've addressed sexuality. These two categories share obvious commonalities ... [but] studying sexuality helps us understand how presuming that heterosexuality is the norm has limited a good deal of historical scholarship. (n.p.)

Gender, Sexuality, and History Education as Citizenship Education

If we concede the premise that history teachers also teach citizenship, then teachers have a professional responsibility to respond to "homophobic hallway" chatter (Crocco, 2002), including bullying, sexual harassment, and other forms of transgression against the dignity of students or teachers. Thus, this chapter concludes with attention to several matters related to the teacher's role as an agent of socialization serving both as a teacher of history and as a representative of an adult community engaged with youth. As has been discussed, the history of the US, to take but one nation's example, illustrates the profound struggles that have been necessary to achieve the expansion of equal rights and human rights in

societies. These struggles continue today, and many of them are related to identity attributes involving gender and sexuality. Throughout the world, women, gays, lesbians, and transgender individuals continue to seek recognition for their status as full citizens in need of respectful and equitable treatment in law, society, and schooling.

In the midst of much recent debate about transgender issues in all these domains in the US, educators and educational organizations have taken small steps to broaden inclusion of LGBTQ topics in K-12 classrooms, including history education as well as teacher education courses. Several groups have provided leadership on policy, especially as it relates to fair treatment of students and teachers' roles in creating a safe climate in schools and classrooms. A Gay, Lesbian and Straight Education Network (GLSEN) report (Greytak, Kosciw, & Diaz, 2009) casts light on the difficult circumstances faced in schools by students who violate the societal norms of gender, particularly bullying, harassment, and violence. GLSEN's National School Climate Survey, first conducted in 1999, provides a historical overview of the challenges faced by LGBTQ students from hostile school environments. As a result of bullying and violence, many LGBTQ students suffer from chronic school absenteeism, poor academic performance, and lowered educational aspirations along with psychological challenges. Although this information may not be directly related to the topic of history education, those who teach history (along with English, math, science, etc.) are members of school communities dedicated to creating environments in which all students can learn. A particular role that history educators might play regarding gender and sexuality would be to historicize the conflicts associated with gender and sexuality as well as providing cross-cultural comparisons. For example, it was not until the modern era that homosexual relationships were pathologized and criminalized in the US, a point brought home in the work of Emilio and Freedman's (2012) book on the history of sexuality.

Another influential group in the realm of teaching and teacher education with an interest in equity issues is the American Association of Colleges of Teacher Education (AACTE). AACTE conducted a survey in 2016 in collaboration with the Association of Teacher Education, another professional group, and GLSEN to determine how best to train future educators to work with LBGTQ students. The partnership among these three organizations is aimed at developing programs and resources that will result in greater inclusion of issues and topics related to LBGTQ students in teacher education. Although these approaches will be at a very general level because teacher preparation covers such an array of grade levels and subject matter, one of the focal areas for the future report and organizational activity includes curricular and pedagogical approaches providing better representation of LBGTQ students and their families.

Several other organizations involved in making education more inclusive should be mentioned here since they contribute to the work of making schools safe spaces for both students and teachers who identify as LBGTQ. First, there is the National Center for Transgender Equity (http://www.transequality.org/issues/youth-students), which, like GLSEN, has an office in Washington, DC, where the group focuses on policy issues, and second, the Queering Education Research Institute (http://www.queeringeducation.org), which conducts

research and advocacy (Meyer, 2007). These organization's websites offer evidence that students who are gay, lesbian, and transgender feel unsafe at schools. For example, over 59% of transgender students indicate that they have been denied access to a bathroom consistent with their gender expression. These students also express concerns about being bullied and harassed by peers as well as dealt with in a nonsupportive fashion by some teachers and school administrators. Perhaps if all adults in schools were better prepared to deal with matters related to LGBTQ students—and saw their roles as citizenship educators as opposed to simply subject matter specialists—these problems would decline.

The history of human rights takes various forms in nations around the world but is a topic on which all educators should be better informed. In the US, although a variety of nondiscrimination policies are in place dealing with gender and LGBTQ students (Mayo, 2014; Russo, 2006), the pivotal enforcement framework for these policies rests on Title IX legislation dating back to 1972. Title IX is perhaps best known for its impact in enhancing women's access to sports. However, it has had other ramifications since its passage. The legislation is best understood as a broad-based prohibition against discrimination based on sex in schools and colleges receiving federal funding. The history and application of Title IX (Zittleman, 2005) would be an appropriate topic for both elementary and high school students to study as part of their history curriculum. Studying and teaching this history would contribute to better understanding the degree to which schools are "failing at fairness" (Sadker & Zittleman, 2009). Osler's publications on human rights education (e.g., Osler, 2009) provide other work that might be taken up within history education to explore what is being done outside the US.

Teaching about gender and sexuality in schools depends on access to materials. In this regard, several resources can be offered, some of which are suitable for use in history education. As noted previously, the Rethinking Schools' comprehensive *Rethinking Sexism, Gender, and Sexuality* (Butler-Wall et al., 2016) is a wonderful resource that has dozens of short, practical pieces dealing with a range of topics. Once again, these materials may need to be placed within historical context so students understand the changes that have occurred over time.

Video resources can also be helpful in sparking discussion of all teachers' roles as citizenship educators. The film *It's Elementary* (http://groundspark.org/our-films-and-campaigns/elementary) has been shown in many teacher preparation programs as a way to explore how many schools take up gay and lesbian issues, even at the elementary level. Likewise, the television episode aired on the Public Broadcasting System on the Stonewall incident is useful in understanding it as part of the civil rights movement. Its related website (http://www.pbs.org/wgbh/americanexperience/features/timeline/stonewall/) contains teaching materials relevant to U.S. gay and lesbian history.

In Australia, work is being done at Flinders University to examine issues of sexuality among youth (http://www.youthsexuality.com.au/). This project has generated a report (Bartholomaeus, Riggs, & Andrew, 2016) that addresses how to explore issues of gender diversity at the elementary level. This report does not mention history education, but the possibilities exist for making these connections.

Over the past several years, many history teacher educators have taken up the work of infusing issues of gender (including masculinity) and sexuality into the preparation of teachers. Although no comprehensive study has been done of the degree to which this work permeates history teacher preparation courses and programs nationwide, anecdotal evidence suggests that treatment of gender and sexuality is slowly making its way into teacher education and, perhaps even more slowly, into history education in schools. Many history educators already consider their role to be that of citizenship educators, as do many teachers of other subjects committed to inclusion and equity of diverse students in classrooms. Over the next several decades, I anticipate that these processes of inclusion will continue.

Conclusion

In 2007, Hahn and her coauthors noted in their chapter on social studies in the second edition of the *Achieving Gender Equity* handbook that "for the most part social studies teacher education has been silent about gender and gender equity issues" and that "social studies researchers have only recently begun to give attention to gender and sexuality" (p. 345). They recommend "substantial attention" be devoted to the "gendered experience in history and contemporary society," including men and masculinity (pp. 350–351), within schools and colleges of teacher preparation. The next year, the chapter on gender and sexuality in the *Handbook of Research in Social Studies Education* also called for "more sustained, critical and multi-dimensional forms of attention to gender and sexuality" (Crocco, 2008, p. 187).

Although only about a decade has passed since these calls for more work on gender and sexuality in social studies, as noted earlier, several factors have conspired to limit the response to these calls. Despite the paucity of research focused on gender and sexuality in history education, a more positive interpretation of this disappointing state of affairs might be to point to the many feminist theoretical concerns that have spread, even if often under the aegis of something other than feminism, gender, and sexuality. Take, for example, many concepts critical to feminist theorizing about education: agency, mestiza consciousness, intersectionality, praxis, positionality, alterity, heteronormativity, subjectivity, performativity, patriarchy, White privilege, hybridity, situatedness, and feminist pedagogy. Although these ideas are not ubiquitous, many scholars and practitioners in history education and social studies are conversant with them and they serve as foundational elements in their teaching about multiple perspectives in history. Nevertheless, they do not deploy these ideas in their research, and this raises a question about why not.

Perhaps the perception exists that raising questions about gender implicates only women and raising questions about sexuality implicates only LGBTQ individuals. In other words, interest in research on these topics is limited to those who self-identify in these categories. This perception would be unfortunate since gender and sexuality are significant aspects of history no matter what the topic or who the researcher. As Scott (1986) pointed out, these social identity

categories, like those of race and class, are closely related to issues of power. Power is unequally distributed in society; ignoring its uneven distribution around identity categories is problematic. As Villaverde (2008) puts it, “the reality is that inequity, injustice, and discrimination exist because we continue to blur and obscure what produces them: power (and who wields it)” (p. 1).

I suggest that we not continue to “blur and obscure” gender, sexuality, power, privilege, and patriarchy within our research in history education. Considerable evidence exists that women are doing well in school but also face inequities in many societies (Buchmann, DiPrete, & McDaniel, 2008). These inequities are social, economic, legal, and political—as well as educational. The international picture around gender is decidedly mixed (Dolby & Rahman, 2008), so extending the discussion to women of the world, their status and challenges, is critical within history education. Likewise, the need to stretch consideration of sexual identity beyond the West remains a pressing matter (Asher, 2015). As a matter of social justice, but equally as a matter of truth-telling, history education would be well served by greater attention to gender and sexuality as part of its research agenda so as to illuminate the many facets of the human condition now obscured by the partialities of traditional and limited perspectives on the past too often encountered within history education.

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14

"Difficult Knowledge" and the Holocaust in History Education

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The Holocaust holds a unique position in history education, in that it is one of the most often-addressed traumatic events in K-12 schools around the world. There is significant literature that provides a rationale for its inclusion in curriculum, that theorizes the problems of learning from social traumas, and, to a lesser degree, that examines the teaching and learning of this extreme event. In this chapter we position the literature related to Holocaust education as an example of how traumatic histories, more broadly conceived, are conceptualized as providing unique learning experiences and outcomes for those who study it, such as increasing empathy, or teaching moral lessons, that are influenced by national, political, and social contexts. To this end, we explore how "traumatic" or "difficult" histories are theorized and analyze what makes teaching and learning such difficult histories unique. At the heart of this analysis is an attempt to understand how histories of suffering and oppression are put to use, and how the more intimately contextualized experiences of teaching and learning in the space of a classroom can, put simply, disrupt these larger goals of history education.

Globally, Holocaust education has become a valued and important part of curriculum in elementary and secondary school classrooms. However, exactly what this curriculum should look like, what theories and ontologies inform it, and the reasons for teaching it are quite varied. There is the question of whether to present the Holocaust as unique or universal or, as is more recently acceptable, to use Yehuda Bauer's conception of the Holocaust as "unprecedented" (Bauer, 2001). There is also the question of geography: What does it mean to teach about the Holocaust in Germany? In Poland? In Israel? In the United States? Finally, and some would argue most importantly (Parsons & Totten, 1991; Totten, 1997, 1998, 1999, 2001; Totten & Feinberg, 1995), there is the question of *why* teach the Holocaust. What can we learn from studying the suffering of others? In order to address such complicated and complex questions, we turn to the literature on *difficult knowledge*.

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There is a growing body of literature that frames the teaching and learning of the Holocaust, a traumatic history, as an encounter with difficult knowledge. There are a variety of approaches and rationales for teaching traumatic histories that reflect a range of thinking about what makes a history difficult. In an analysis of teaching and learning about *The Diary of Anne Frank*, Britzman (1998) introduced the term *difficult knowledge* to articulate the problematic nature of teaching and learning about social trauma. Drawing on psychoanalytic theory, Britzman called attention to how students' inner conflicts disrupt learning histories of hatred, aggression, and suffering. Central to the difficulty of learning about traumatic histories is experiencing the limits of the self through encounters with the otherness of knowledge (Pitt & Britzman, 2003). In considering the role of traumatic histories in South African museums, Garrett and Smith (2012) explained, "we consider difficult knowledge to be one trace (among many) left by social trauma, a trace that is felt/found in pedagogical relations to an as-of-yet unresolved social/historical problematic" (p. 200). From a psychoanalytic perspective, the study of social traumas, such as the Holocaust, can lead to psychic and social breakdowns of understanding that have significant implications for the individual's capacity to know about and learn from the experiences of others (Britzman, 1998; Pitt & Britzman, 2003).

Emotions play a significant role in the breakdown of understanding in difficult knowledge. Simon (2011), researching museum exhibits of traumatic histories, explains that "difficulty happens when one's conceptual frameworks, emotional attachments, conscious and unconscious desires desettle one's ability to settle the meaning of past events" (p. 434). Here again is the inability to know: Uncertainty of meaning is made evident in attempts to witness the trauma others have experienced, which disrupts previously held safe and settled meanings about the self and others. The disruptions and uncertainties are accompanied by negative emotions, such as revulsion, shame, grief, and anger. Simon (2011) discusses how the emotional response to difficult knowledge, while often seen as problematic and as limiting thinking, can lead an individual to thoughts and ideas that might not otherwise be provoked:

> To witness in a manner that opens the possibility of altering the existence of that to which it bears witness requires a dialectical coupling of affect and thought, implicating the self in the practice of coming to terms with substance and significance of history. (p. 447)

This desire to alter the hatred and violence that are evident in traumatic histories is central to the rationales behind teaching them, yet the pedagogy of difficult knowledge is precarious and not fully understood and, therefore, the ability to achieve these ambitious goals remains uncertain. The Holocaust is one of the few historical events in school curricula around the world where it is commonly accepted and often expected that students should thoughtfully consider the suffering of others (Fine, 1995; Schweber, 2004). Holocaust education provides an illuminating case that demonstrates the importance of space, place, time, and identity when considering what might make a history "difficult." Though the Holocaust is often positioned by teachers, politicians, authors, and others as

inherently difficult or troubling, research exploring the evolution and nature of Holocaust education demonstrates the importance of considering why a history is taught, where it is taught, when it is taught, the political and cultural landscapes on which it is taught, to whom it is taught, and by whom it is taught when determining if the history is understood as difficult. We will explore these issues thematically and geographically, as they are inextricably linked.

Rationales for Holocaust Education

Holocaust education around the world is mobilized for political and cultural means, and the reasons for including, highlighting, or downplaying the Holocaust continue to shift and change. There are broader and more general rationales that are somewhat more permanent—for example, the Holocaust as currently taught in Israel has more of a focus on commemoration and remembrance than it may in other countries. In Germany, there may be more of a focus on national identity and responsibility, though this focus is also shifting as new generations come of age and regimes shift. Some countries, such as Estonia (International Holocaust Remembrance Alliance, n.d.a), Hungary (International Holocaust Remembrance Alliance, n.d.b), and Lithuania (International Holocaust Remembrance Alliance, n.d.c) include Holocaust education in their national curricula. Other countries do not have a national curriculum but do promote Holocaust education, such as Finland (International Holocaust Remembrance Alliance, n.d.d) and Denmark (International Holocaust Remembrance Alliance, n.d.e). No matter the national curricular landscape, classroom teachers remain tasked with making curricular and pedagogical decisions about how and why they will teach the Holocaust.

Much of what has been written about Holocaust education relates to why teachers should engage in this endeavor. While history teachers always should be thoughtful about why they teach any specific content, the issue of rationale has become central to Holocaust education due to the trauma and suffering that underpin this history. Many of the recommendations and guidelines focus on the issue of choosing and developing rationales for engaging students in a study of the Holocaust. In one of the first articles focusing on the topic, Holocaust survivor and scholar Henry Friedlander (1979) exhorted emerging Holocaust scholars and pedagogues to think carefully about teaching this subject. Since that time, the issue of which rationales can or should drive a study of the Holocaust has become increasingly difficult and complex and has inspired much debate and scholarly inquiry. Samuel Totten (Parsons & Totten, 1991; Totten, 1997, 1998, 1999, 2001; Totten & Feinberg, 1995) outlines the multiple rationales he believes would appropriately guide teachers in developing their Holocaust curricula. He discusses the vital importance a clear and consistent rationale plays in a study of the Holocaust and how it is up to the teacher not only to choose a rationale but also to fully understand why she has picked this particular reason for teaching and not another equally valid reason.

According to Totten and Feinberg (2016), "the strongest rationales are those that are clearly stated, succinct and to the point, and highly specific" (p. 8). They give examples from their previous work (Totten & Feinberg, 1995)—including: "to

think about the use and abuse of power, and the implications for a society that violates civil and human rights" and "to gain insight into the fact that the Holocaust, and thus, other genocidal acts, are not inevitable"—and also offer new rationales, such as "to ponder what it means to be a bystander in a world where fellow humans are treated so brutally and where crimes against humanity and genocide continue to be perpetrated" (p. 9). These examples demonstrate the level of specificity called for by the authors and illustrate how a study of the Holocaust may be connected to broader issues such as human rights and/or the current abuse of those rights around the world. What remains constant is the focus on learning about others' past suffering in order to make decisions about how to act now and in the future; in other words, for students to study the suffering of others in order to make their own decisions informed by both the cognitive and the affective understandings developed through this study.

Indeed, one of the most common rationales for bringing testimonies of trauma and suffering into the classroom is that an examination of this difficult history will be accompanied by powerful moral lessons (Fine, 1995; Lindquist, 2011; Schweber, 2004). In discussing why students should learn about Anne Frank's life, Britzman (2000) explains that it is

> to become attentive to profound suffering and social injustices in their own time; to begin to understand the structures that sustain aggression and hatred; and to consider how the very questions of vulnerability, despair, and profound loss must become central to our own conceptualization of who we each are, not just in terms of reading the diary as a text but also in allowing the diary to invoke the interest in the work of becoming an ethical subject. (p. 29)

This idea of *invoking the interest in the work of becoming an ethical subject* is distinct from teaching a set moral lesson, allowing for much more subjective engagement with history. Asking students to learn from the suffering of others moves away from dictating moral lessons and toward presenting students with reasons for envisioning themselves as moral or ethical agents in the world (Britzman, 2000; Fine, 1995; Schweber, 2004).

There are also educators who teach difficult histories to be transformative, which means providing an opportunity for students to apply knowledge to action. McKnight (2004) questions how teachers of traumatic events can move students from emotional response to critical analysis and to the "emotional desire to unpack the social meaning of texts, assume appropriate responsibility, and propagate more universal expressions of human freedom through their actions" (p. 334). The hope in putting students in dialogue with testimonies and witness to trauma is that an affective, authentic learning experience will expand how students view themselves and their relationships with and responsibilities to others. Felman (1992) describes an example of her teaching of a college-level class focusing on testimonies from Holocaust survivors and the existential crisis that ensued among her students as a result of their engagement with the testimonial evidence of severe suffering. While she was initially quite surprised and troubled by their response to encounters with testimonies of trauma, she came to realize that

> if teaching does not hit upon some sort of crisis, if it does not encounter either the vulnerability or the explosiveness of a (explicit or implicit) critical and unpredictable dimension, it has perhaps *not truly taught*: it has perhaps passed on some facts, passed on some information and some documents, with which the students or the audience – the recipients – can for instance do what people during the occurrence of the Holocaust precisely did with information that kept coming forth but that no one could *recognize*, and that no one could therefore truly *learn, read*, or *put to use*. (p. 53; emphasis in original)

Here the aim of learning from, not just about, trauma is central to the classroom experience, and it is this dialogue or relationship with those who have suffered, via their testimonies, which creates an opportunity for students to be shocked and possibly moved to action by what they learn. Yet, the link between crisis and action is precarious. Garrett (2012) speculates that a responsible pedagogy that introduces students to crisis might also clarify the resistance to see and learn from "historical ruptures that feel unprecedented" (p. 9).

Despite the dangers involved in shocking students with testimony of the violence and suffering human beings are capable of inflicting upon one another, LaCapra (2001) argues that "opening oneself to empathetic unsettlement is…a desirable affective dimension of inquiry which complements and supplements empirical research and analysis" (p.78). LaCapra argues that we study the pain of others not just to be affected by their suffering, or merely to document facts and details about what happened, but rather to be transformed in the pursuit of meaningful questions regarding what it means to be human and to live together in this world. In taking an inquiry approach to teaching and learning about traumatic events, moral response becomes a process of questioning and seeking understanding that leads to action rather than a doling out of judgment and decrees about what is right and wrong behavior (LaCapra, 2001). Like Felman (1992) and LaCapra (2001), Simon and Eppert (1997) argue that learning from testimonies of trauma can only happen when the student is affected by what he or she encounters in the representation of another's experience and that there is no preset or utopian lesson to be learned from this unsettlement, from the encounter with another's suffering. Rather, LaCapra (2001) writes, "empathetic unsettlement poses a barrier to closure in discourse and places in jeopardy harmonizing or spiritually uplifting accounts of extreme events from which we attempt to derive reassurance or a benefit" (p. 41). It is this "barrier to closure" that bumps up against many of the most common rationales for including the Holocaust in the history curriculum.

In response to the breakdown of knowledge of the past and of others accounted for in difficult knowledge, the concept of *reparative curriculum* (Tarc, 2011) provides a pedagogical rationale for confronting past social traumas. Reparative curriculum aims to "develop and sustain reparative relations across and between strained social collectives" (p. 350). This is conceptually hard work with precarious and fragile psychic and social outcomes (Tarc, 2011). Reparative history curriculum does not allow for objective narratives of the past; rather it requires personal encounters with difficult knowledge that intertwine thought and

emotion and result in highly subjective historical accounts. This approach to Holocaust education differs significantly from curriculum around the world with clearly stated goals dependent upon shared narrative understandings of the past.

Holocaust Curriculum

The place of the Holocaust in curriculum around the world has changed over the past several decades. Bromley and Russell's (2010) analysis of 465 textbooks from 69 countries helps to contextualize and illuminate the evolution of Holocaust education. They examined textbooks published from 1970 to 2008, a period of time in which Holocaust education became a mainstay in classrooms around the world. They identified two primary narrative constructions of this event: either "the Holocaust is presented as important for students to know about because it is a central moral event in the Western story" or "the Holocaust is presented as an instance of globally unacceptable behaviour, important for teaching universally-relevant lessons in tolerance and peace" and connected to human rights (p. 157). These narratives reflect some of the stated rationales for teaching the Holocaust, which indicates a level of cohesion around the reasons why this history is taught. These descriptions are telling because even when the Holocaust is couched in a more disciplinary narrative, the authors identify a moral component to this history. This focus on morality and ethical behavior assumes students will have an emotional response to the historical content and will then develop attitudes and principles aligned with accepted narratives of good and evil, right and wrong.

That there is a moral aspect to the human rights narrative is perhaps less surprising, as human rights education is couched in the idea that there are certain moral absolutes regarding safety and freedom that should ground all civilizations. As Eckmann (2015) notes, "Often, the words of politicians, educational planners, and ministries in charge of memorials make it seem obvious that whatever the term may mean in a given context, Holocaust education should be a tool for human rights education" (p. 54). Bromley and Russell (2010) demonstrate that though the "central moral event" and "tolerance and peace" narratives continue to exist, there has been a distinct shift toward the human rights narrative (see also Fracapane, 2015). However, Bromley and Russell (2010) also problematize what this shift may mean. They understand that a study of the Holocaust in this vein is intended to create active, engaged, morally upstanding global citizens who will act in the face of injustice in the future. However, they also discuss that the Holocaust is often included in official curricula (in this case, in the form of state-sanctioned textbooks) for political reasons. For instance, national leaders may want their countries to be seen as moving toward accepted European values as a means of gaining respect and stature in the European Union. Another example is seen in construction of human rights abuses as happening elsewhere. The authors point to the example of Tunisia as one where the textbooks focus on the Holocaust and other human rights abuses as occurring outside of Tunisia. Theoretically, given the omission of human rights abuses within Tunisia from the curriculum, students would conclude that human rights abuses could not and do not happen in their own country.

Bromley and Russell (2010) conclude their analysis of textbooks by posing an important and unanswered question: Why do some events become global cultural symbols while others remain primarily national issues? This remains an open question and a valuable area for researchers to explore in the future. Obvious possible explanations include the scope and scale of the atrocity, the particular group subject to suffering, and perhaps the length of time since an abuse took place. In the following section we examine the evolution of Holocaust curriculum in Germany, Eastern Europe, and Israel as we begin to explore this question.

Boschki, Reichmann, and Schwendemann (2010) attribute the rise of Holocaust education in Germany to a 1966 radio speech given by Theodor Adorno on "Education after Auschwitz." The authors chronicle how education about the Nazi regime was present from 1945 on, but attention to thriving Jewish communities prior to the Third Reich and their subsequent oppression, suffering, and murder was lacking until the 1980s. They highlight the various venues in which Holocaust education takes place: "classes in school, memorial days, memorial sites, education programmes for adults, education about and after Auschwitz as part of religious education, and finally, films, the Internet and teaching media" (p. 136), which are similar to Holocaust education in other parts of the world. Here, Germany is somewhat unique in that memorial sites exist in the spaces where atrocities occurred, though the same is true of much of Eastern Europe.

An examination of Holocaust education in places such as Poland, Lithuania, and Ukraine yields further insight into the role context plays in establishing difficult histories. In Poland, for example, the evolution of the World War II narrative has made way for a more complex view of Poles during the war. While the immediate postwar years saw a focus purely on all Poles as victims of the campaigns of both the Nazis and the Soviets, recent research and scholarship has illuminated the ways in which ethnic Poles were complicit in the oppression and attempted elimination of Polish Jews. As Gross (2014) notes, Polish youth applied their knowledge of the suffering of Poles to photographs of Polish collaboration with the Nazis in the maltreatment of Polish Jews, which led to their misunderstanding of the actions portrayed in the photographs. They believed they were looking at Christian Poles being harassed and attacked by Nazis; in fact, the victims in the photograph were Jewish Poles. This example demonstrates the potential for misunderstanding of the past when national narratives overpower a deep understanding of the complexity inherent in all history—including traumatic histories.

Similarly, Dietsch (2012) observes that political considerations play a large role in the construction of Holocaust narratives in classrooms in new and emerging democracies. Looking specifically at the construction of the Holocaust in Ukrainian textbooks from independence to 2006, Dietsch explains that the Holocaust is seen as something committed by Germans and other Europeans (not Ukrainians) and that the Nazi occupation of Ukraine was equally oppressive for Jewish and non-Jewish Ukrainians. In this way, the goal of developing a national identity through the teaching of history is met, while downplaying the specific suffering of Jews in Ukraine during World War II.

Given this understanding of Ukrainian history textbooks, Rosengarten (2015) exhorts us to look differently at this history: "Now is the moment for revision, for turning inside-out and upside-down narratives that were composed to serve obsolete political dogmas" (p.44). Rosengarten, an American Jewish professor, found himself telling young Ukrainians about the Jewish history of their own town while attending a conference in Drohobych, Ukraine, in 2012. While he is specifically talking about the way the Holocaust is taught and constructed in Ukraine, his words are instructive on a larger scale. Difficult histories may be those histories that are twisted, bent, torn, reconstituted, or omitted altogether in the service of political gain. A reasonable argument could be mounted that almost any history taught in public schools, whose mission is to develop a sense of citizenship and often patriotism in young members of a national community, could fall under this umbrella. Indeed, this may be true. However, when those histories involve the pain, suffering, persecution, oppression, and murder of specific members of a community—at the hands of other members of the community—the reckoning is much greater.

In Israel issues related to space, place, time, and identity deeply influence how the Holocaust curriculum has developed. Gross (2015) deftly explains that the changing Holocaust narrative in Israel is tied to issues of national identity, political power, and international standing. Given this changing narrative, Holocaust education in Israeli schools has also shifted and evolved over time. Porat's (2004) analysis of the evolution of Holocaust education in Israel from the 1950s through 1990s demonstrates how national shifts can greatly impact Holocaust curriculum. In the early years of the state, leaders of Israeli education sought to minimize or exclude the Holocaust from the national curriculum because they did not want Israeli teens to identify with the "exilic Jews, those led like sheep to the slaughter, those submissive Old Jews" (p. 624). When the Holocaust was taught, the focus was on the Warsaw Ghetto uprising and other instances of resistance. Between 1967 and 1977, "the Holocaust became one event among many others in the history curriculum" (p. 630) due to national events such as the Eichmann trial, the Six Day War, and the Yom Kippur War. Finally, Porat cites the passing of the "Holocaust memory law by the Knesset on 26 March 1980" (p. 631) as the most recent change in the way the Holocaust is taught in Israel. The rise of the Likud party to power in 1977 allowed for this change, and for the Holocaust to morph from a memory of shame that was separate from a new Israeli Jewish identity "into the cornerstone of Israeli students' day-to-day identity" (p. 631). Porat's work demonstrates that national events and political shifts impact and influence both public memory and national curricula.

While the majority of Porat's (2004) article is devoted to chronicling and analyzing the evolution of Holocaust education in Israel, he leaves the reader with difficult and weighty questions that return to the issues raised by the difficult knowledge theorists: "The dilemma remains acute for us today: how can we teach young students about an event that a human mind cannot comprehend? How does one transmit an event that is not transmittable?" (p. 636). These questions remain troubling and unanswerable today, though they bring up other questions about time and space. How much of the silence in the early years of the Israeli state was related to the inability of Israeli citizens and Holocaust survivors

to entertain these questions? How much of the shift in focus on identity and historical understanding was related to a shift not only in realpolitik but in increased temporal distance from the genocide itself? These unanswered (unanswerable?) questions contribute to our thinking about how, when, and why histories become "difficult."

Holocaust Education Organizations

A variety of organizations devoted to teaching about the Holocaust, genocides, human rights abuses, and related topics offer a wide range of rationales, resources, and support for teaching the Holocaust around the world. An examination of four of these organizations provides a description of some prominent rationales and illuminates the complex and often uninterrogated issues related to a study of the Holocaust. This examination pays particular attention to the ways in which these organizations address the issues of trauma and suffering surfaced by the literature on difficult knowledge.

The International Holocaust Remembrance Alliance (IHRA), centered in Berlin, provides teachers with resources to teach about the Holocaust by itself or in relation to other genocides. They provide seven possible rationales for a study of the Holocaust, including "the Holocaust should be studied because it fundamentally challenged the foundations of civilization," "heighten[ed] awareness of the potential for genocide in the contemporary world," and "help[s] students develop an awareness of the value of diversity in a pluralistic society and encourages sensitivity to the positions of minorities" (International Holocaust Remembrance Alliance, n.d.f). Their reasoning highlights potential lessons students might learn from the suffering and trauma of others.

Reflecting the oft-cited, yet arguable, rationale to teach history in order to learn from past mistakes and therefore avoid them in the future, there is a significant focus on the actions of the perpetrators instead of the experiences of the persecuted. For example, the IHRA provides this as their first potential rationale for teaching about the Holocaust:

> The Holocaust was a watershed event, not only for the 20th century but also in the entire history of humanity. It was an unprecedented attempt to murder a whole people and to extinguish its culture. The Holocaust should be studied because it fundamentally challenged the foundations of civilization. (International Holocaust Remembrance Alliance, n.d.f)

The focus is on the "unprecedented attempt to murder a whole people," not on the experiences of the people being murdered. Therefore, students would presumably learn about the suffering of others in order to understand the wrongness of the perpetrators, meaning that the focus is not on the encounter with others' trauma but on what we can learn from that trauma. This focus on analysis and evaluation can potentially preclude a genuine—and therefore troubling—encounter with the very aspect of the Holocaust that makes it "difficult."

Yad Vashem in Jerusalem is the World Holocaust Remembrance Center. Established in 1953, the institution is formed around the four pillars of remembrance: commemoration, documentation, research, and education. The International School for Holocaust Studies, the current education arm of the institute, began in 1993 and their "educational rationale places the human being, the individual, at the center of our understanding of history" (Yad Vashem, n.d.). Further, their statement that "the student's encounter with the past and with its ethical dilemmas will be internalized over the years and will contribute to the construction of his or her own identity and personal ethics" (Yad Vashem, n.d.) indicates that one of the goals of the institute is to develop ethical, moral citizens. They note that a teacher should only begin a Holocaust unit after "s/he has acquired the information and feels emotionally equipped to deal with the subject" (Yad Vashem, n.d.). They make reference to the emotional preparedness of the teachers but do not specifically address the emotions that are likely to be stirred in students. They also do not appear to give further guidance to teachers about how to "emotionally equip" themselves through their online offerings.

Yad Vashem offers a plethora of resources for educators and students at all levels and stages of historical understanding of the Holocaust, including online courses available to teachers and the general public, lesson plans, guidelines for remembrance ceremonies, online educational units, readings, artifacts, arts-related resources, films, interviews, and so on. The resources are offered in 21 languages, which gives a sense of the intended international use of said resources. The unit and lesson plans often provide rationales for teaching a particular topic, though these rationales and other preparatory material appear to prioritize cognitive goals and objectives over students' subjective, emotional encounters with difficult knowledge.

The United States Holocaust Memorial Museum (USHMM) in Washington, DC, provides rationales and materials for teaching about the Holocaust. Much like Yad Vashem, the USHMM is one of the leading institutions in the world in the area of Holocaust education and their online resources are freely available to teachers around the world, also in a variety of languages. They also provide a variety of professional development opportunities. Their resources for teachers are extensive, including rationales, lesson plans, photographs, readings, and other curricular materials. According to USHMM, the Holocaust should be taught because it

> provides one of the most effective subjects for examining basic moral issues. A structured inquiry into this history yields critical lessons for an investigation into human behavior. It also addresses one of the central mandates of education in the United States, which is to examine what it means to be a responsible citizen. (United States Holocaust Memorial Museum, n.d.a)

This very broad rationale reveals that the museum approaches a study of the Holocaust with a combined focus on morality and rationality.

Throughout their discussion of rationale, the museum focuses primarily on exploring how people acted in response to the various stages of the Holocaust,

and why they acted in that way, as a means of fostering discussion about how people should act in the future, concentrating on cognitive rather than affective engagement. The museum does provide some guidance for teachers in the area of encountering the trauma and suffering of Holocaust victims, in the last item on a list of "Guidelines for Teaching about the Holocaust": "make responsible methodological choices." Here the museum advises teachers to be thoughtful and judicious in their selection of "horrific, historical images" to show students and advises teachers to "try to select images and texts that do not exploit the students' emotional vulnerability or that might be construed as disrespectful to the victims themselves (United States Holocaust Memorial Museum, n.d.b)." This guideline directly addresses how students encounter the suffering of unknown historical others. The museum acknowledges that a study of the Holocaust may entail an emotional response from students and encourages teachers to be aware of this response and to make pedagogical choices that will best allow students to learn the lessons related to their chosen rationale. These are important pedagogical considerations that teachers should make for any unit of study, particularly one grounded in suffering and trauma.

Totten and Feinberg's (2001) *Teaching and Studying the Holocaust* is perhaps the best-known and most widely used compilation of recommendations, guidelines, and suggested resources currently available. One of the editors was employed by USHMM, and many of the photographs and resources in the book were obtained from the museum. The book is recommended by the museum and sold in its bookstore. Totten and Feinberg (2001) organize Holocaust education within two broad frameworks. One concentrates on the *history* of the Holocaust, focusing attention on the historical events that led up to and comprised what we have come to know as "The Holocaust"—namely the persecution of Jews and other "undesirable" groups (in particular, Communists, Socialists, the disabled, Roma [gypsies], Jehovah's Witnesses, and homosexuals) by the Nazi government during the period 1933–1945. The other framework focuses on the *lessons* of the Holocaust, concentrating on the evils of stereotyping, scapegoating, prejudice, and oppression while using the Holocaust as an example of a time when these agents combined to allow genocide to happen. The remainder of the book, written by prominent scholars in the field, focuses on the different types of resources available to educators (film, diaries, oral histories, etc.) and how those resources may be used in the classroom. While the individual authors sometimes allude to the emotional weight of learning about the Holocaust, there is no explicit focus on emotional or affective engagement.

Facing History and Ourselves (FHAO) also provides many resources for teachers interested in teaching about the Holocaust, genocide, human rights abuses, and civil rights more broadly. Founded near Boston, Massachusetts, in the late 1970s, the organization is now active across the US and in countries around the world, including Northern Ireland, China, and South Africa. As the organization notes, "By studying the historical development of the Holocaust and other examples of genocide, students make the essential connection between history and the moral choices they confront in their own lives" (Facing History and Ourselves, n.d.a). With this understanding of the purpose of Holocaust education supporting their work, FHAO provides a clear curricular framework and a vast array of resources to teachers around the world.

Over the past 40 years, FHAO has evolved into a robust professional development organization that attempts to incorporate moral and ethical elements into history education. FHAO calls on teachers and students to engage emotionally with histories of suffering, trauma, oppression, and abuse as evidenced by the available resources and professional development. The primary focus of FHAO is on the actions students can take in the future to prevent abuses from bullying to genocide. This goal relies on students developing empathy for those who are in danger, which necessitates an emotional engagement with others' suffering. The FHAO approach focuses on the Holocaust as the starting point for discussions of morality, justice, and resistance more broadly.

FHAO has a strong interdisciplinary curricular framework that incorporates history and literature, to study issues of identity, ethics, and democratic citizenship. Emotional engagement is attended to in FHAO's "Pedagogical Triangle":

> Facing History created the Pedagogical Triangle for Historical and Civic Understanding to serve as a touchstone for balanced program and lesson planning. The arrows between intellectual rigor, emotional engagement, and ethical reflection are bidirectional, as these processes strengthen each other. At the center is the students' civic agency, their belief that they can play a positive role in their peer groups, schools, communities, and larger world. (Facing History and Ourselves, n.d.b)

The centrality of emotions in their curricular framework is an important acknowledgment of the difficult knowledge students and teachers encounter as they study the Holocaust as well as other traumatic histories supported by FHAO curriculum and teacher professional development. While there is no further explanation of the triangle on the organization's website, it is likely that more in-depth instruction is provided in professional development sessions for teachers. FHAO provides one model of Holocaust education that has evolved to explicitly include pedagogical and curricular attention to emotional engagement and affective understanding.

What is clear from this examination is that educators associated with these organizations have thought deeply, carefully, and seriously about why and how teachers should approach a study of the Holocaust. Each organization, uniquely situated and qualified to support Holocaust education, provides resources and opportunities for teachers and students at a level that is unmatched by other traumatic histories. Across each organization, the desire to achieve objectives beyond historical understanding—such as moral reasoning or active citizenship—is evident in the rationales and teaching materials they provide for teaching the Holocaust. The difficulty that accompanies learning about the Holocaust, the emotional encounters with suffering, oppression, and hatred inherent its history, is evident and implied yet not fully addressed.

Teaching and Learning About the Holocaust

Boschki, Reichmann, and Schwendemann (2010) summarize several quantitative and qualitative studies conducted in Germany, which reveal that the majority of German young people are familiar with this history but conceive of it in very

different ways. This knowledge is somewhat troubling to the authors due to the misinformation or superficial information students sometimes have. Boschki, Reichmann, and Schwendemann (2010) point to students who see Adolf Hitler as the "sole person responsible for National Socialism" (p. 142) and have a conception of Jews as only "victims" and "foreigners" (p. 143) even after an 11-week unit on National Socialism and the Holocaust. As they evaluate the study that documented these findings (Schwendemann & Wagensommer, 2007), Boschki, Reichmann, and Schwendemann (2010) make this cogent observation about the importance of intentionally attending to students' emotional responses:

> At the end of the teaching block, which was very much geared toward cognitive content, the group visited the concentration camp of Natzweiler in Alsace, in France. This visit clearly left emotional traces: in the interviews students mentioned sadness, shock, dismay, shame, feelings of sickness, depression, loss, fascination at the evident possibilities to influence others, anger, and many other feelings. The above statements were all made during exchanges discussing the experience in peer groups; evidently no time for such discussion had been left in the formal timetable. (p. 143)

Here, the authors point to the disconnect between the students' emotional engagement with past trauma and suffering and the lack of structure or support for that emotional engagement in an educational context focused on cognitive engagement. This demonstrates the need for a more intentional and explicit attendance to emotion and affect in the teaching of difficult histories. Importantly, as Meseth and Proske (2010) note,

> moral expectations linked to the treatment of this subject "in the land of perpetrators" are very high. In addition to the goal of learning historical facts, history lessons about the Nazi era, especially in Germany, face a special demand that teachers transmit moral positions, such as identification with victims of the Holocaust, empathy for persecuted minorities, and the rejection of violence and discrimination. (pp. 206–207)

This focus on morality as an inherent purpose for teaching the Holocaust in Germany is at the crux of what makes this history "difficult" in Germany. Education about the Nazi party, Adolf Hitler, and the murderous campaigns waged in the name of a greater German good is framed as a lesson in right and wrong—students are expected to leave a study of this history with an understanding of why the Holocaust was immoral and with a sense of righteousness and action that they will work to prevent such events in the future.

However, how this happens in practice depends a great deal, as Meseth and Proske (2010) detail in their case studies of four teachers teaching about the Holocaust and the National Socialist state, on how and why teachers approach this moral duty. These four cases are illustrative in both their specificity and their universality. For example, the first case documented students' reactions to viewing filmed testimony of a Jewish man describing his confrontation with a former friend who, as a member of the Hitler Youth, did not intervene in the harassment

of the Jewish man by other Hitler Youth. The students wanted to dissect the narrative told in the video and to share and discuss their many opinions about the interactions between the two men. The teacher, however, continued to redirect the students to focus on the "topics" brought up in the video in order to structure the next part of the lesson. In so doing, the teacher did not engage his students in some of the more morally thorny or uncomfortable issues brought up by the film. He did not provide space in the classroom for students to grapple with ethical and moral questions about the men's reactions in this moment, though the students' conversations indicated that the students wanted to engage in this work.

Meseth and Proske's (2010) second case described the use of a reading from *Mein Kampf* and revealed the pitfall of a teacher expecting a curricular resource to elicit a particular emotion from students. The teacher expected the students to be appalled by an excerpt about Hitler's racial theories; however, the teacher asked for a factual summary of the text. When the students supplied the summary without expressing the expected outrage at the language or ideas in the text, the teacher was angered and launched into a "quasi-political, utterly unpedagogical 'tirade'"; the authors astutely note that, while this is unacceptable in any circumstance, the consequences are heightened because "the failure to learn the evils of NS [National Socialism] can turn a 'bad student' into a 'bad person'" (p. 213). Not only were the students made to feel stupid by their teacher's words, they were immoral because they did not spontaneously express their disgust for Hitler's ideas. This example demonstrates a pedagogical problem faced by many teachers: The teacher did not give the students the appropriate directions in order to meet his expectations for their emotional engagement. This also demonstrates a pedagogical problem related to teaching difficult histories; teachers sometimes silently expect students to develop and express specific emotional reactions to content and when students do not independently do so, the teachers express outrage at the students' lack of morality.

Meseth and Proske's (2010) third case focused on how students' prior knowledge of the Holocaust and Nazi regime influenced discourse in the classroom. When a student asked how long they would be studying the Nazi state, the teacher responded that they would spend the whole semester on the topic. While a unit of this length is not typical in Germany, it is not prohibited. In response, several of the students sighed or groaned to indicate their displeasure. As with the second case, this is a moment that is common in many classrooms but has potentially heightened significance when it happens in relation to Holocaust education in Germany. Were the students merely uninterested in a unit of this length about any topic? Was there something specific to this unit to which they objected? Were they expressing "Holocaust fatigue" (Schweber, 2006b)? As the teacher responded to the students with an explanation of the importance of the unit and a rationale for its length without asking the students about their emotional reaction, those questions were left unanswered.

Meseth and Proske's (2010) fourth case provided an example of how students' prior knowledge can help them have an engaging and relevant discussion about a topic related to the Holocaust; in this case, the students had watched a film about Hitler's rise to power and then discussed what they believed led to the Nazi state. The students applied knowledge from the film,

their prior knowledge, and their own morality as they discussed whether Hitler was a demagogue and why people chose to follow him. The teacher made the pedagogical decision to create space and time for this discussion. Meseth and Proske deem this case an example of successful Holocaust pedagogy and attribute this success to the openness of the classroom, sufficient time being allotted for the discussion, and the focus on a true open-ended question with which historians struggle.

Holocaust education in Germany is instructive because it reveals that while teachers in Germany may grapple with many of the same issues as teachers elsewhere in terms of connecting their cognitive and affective goals for their students, the location in which they teach further complicates the issue. When teaching in the land and among the descendants of the perpetrators of the Holocaust, and sometimes using local memorial sites to do so, the missteps and missed opportunities highlighted in this section bring up larger questions about students' abilities to meet the national and classroom goals of empathy, remembrance, and future vigilance.

In the US, Holocaust education is mandated in several states and present in the majority of state standards. Schweber offers perhaps the best known U.S. empirical studies (Schweber, 2004, 2006a, 2006b, 2008; Schweber & Irwin, 2003). Her work demonstrates the complexity involved in teaching and learning about the Holocaust. One teacher who taught a class based on the FHAO curriculum succeeded in developing a deeper sense of morality and justice in students, though the students did not demonstrate an understanding of the historical event itself: "Mr. Zee had instilled in his students some of the moral lessons many would like students to learn from studying the Holocaust despite not actually teaching them about the Holocaust" (Schweber, 2006b, p. 16). Given Mr. Zee's and FHAO's focus on inculcating moral lessons in students, it seems that Mr. Zee's rationale and his students' learning are aligned. However, questions arise about what it means to learn about the Holocaust and if learning important moral lessons about individual choice is the same as learning about history. Schweber's work often focuses on the moral messages teachers seek to teach via the Holocaust and how the learning of those messages is perhaps more complex than the teachers or curriculum designers originally thought. Her studies have begun to show that, despite the acceptance and approval of this topic within the general K-12 curricula, we have much to learn about what teachers expect to teach with Holocaust curricula.

Barr et al. (2015) conducted a large-scale study of the FHAO professional development model using a randomized controlled trial. They focused primarily on teachers who participated in a week-long professional development experience led by FHAO facilitators and who then implemented, to some degree of fidelity, the FHAO curriculum on the Holocaust. Findings indicated that

> teachers were able to create more open classroom climates, provide increased civic learning opportunities, and impact students' learning and growth in areas critical to participation in a democracy. This includes the capacity to analyze historical evidence, causation, and human agency, and developing one's sense of civic efficacy and tolerance. (p. 36)

These results are of particular interest to the issue of teaching difficult histories because they indicate that students are capable of both understanding historical events and extrapolating the lessons of those events to be applicable in their own lives. However, as the authors note, the measure they used to assess historical thinking is new and needs further validation before it can be used with relative certainty. Also, as the authors do not provide examples of student responses or classroom vignettes, it is difficult to understand exactly what kinds of teaching and contextualization occurred in these classrooms. Finally, the question of how the students engaged emotionally with the content focused on suffering and trauma is absent from this study. This study is a positive and useful first step in empirical assessment of the teaching of difficult histories.

A report commissioned by the USHMM reveals a bit more about the status of Holocaust education in the US (Donnelly, 2006). Teachers at the secondary level in 48 states and the District of Columbia ($n = 219$) responded to a survey regarding their involvement in Holocaust education. This brief report revealed that 88% of teachers approach the Holocaust from a *human rights perspective* (p. 52). Although the author does not define the perspective, it is likely that this means that the majority of the Holocaust educators in this study view the Holocaust as a historical event with universal lessons about the importance of upholding the rights of all human beings. Based on the plethora of recommendations and possible rationales for teaching this subject, it is possible that the human rights perspective allows teachers to use the Holocaust as a way to teach their students about universal themes such as prejudice, discrimination, and oppression. The information is helpful but does not state how teachers envisioned a human rights perspective or how they would teach to this goal.

The evolution of the Holocaust narrative in schools toward a more universal human rights framing allows for a broader conception of difficult histories while not questioning the central tenet of much of this education—that the Holocaust remains central to any unit on genocide. While the use of the Holocaust for the pedagogical purpose of teaching about human rights is inherently problematic, questions do arise about the messages this framing sends to students. Particularly for those students whose own heritage histories involve human rights abuses, a continuing focus on the Holocaust as the sole or primary example of human rights abuses and/or genocide from a moral or ethical perspective eludes and omits the stories that exist in the bones of the students in the room (Schweber, 2006b). In other words, Muslim, African American, Latinx, Southeast Asian, and countless other students are sometimes left wondering: What about the oppression of my ancestors? Does my story matter, too?

Classrooms have the potential to be transformative spaces where moral response and action are supported and encouraged when they are envisioned and structured as communities of memory. Yet, this potential is not always realized. As the sociocultural research into historical understanding shows (Barton & Levstik, 2004; Epstein, 2009; Goldberg, 2013; Levy, 2014; Peck, 2010), issues of identity and context deeply affect how students make sense of what they learn in history classes and what they do with what they learn. These issues of identity and context are central to conceptualizing difficult histories and what students learn from them (Barton & Levstik, 1998; Schweber, 2006a; Sheppard, 2010).

Teachers often struggle to navigate the multiple identities and interpretations that students bring to the history classroom, making emotional discussions about difficult and controversial histories too challenging to be implemented (Gaudelli, Crocco, & Hawkins, 2012; Hess, 2009).

Difficult Knowledge: A Path Forward

Zembylas (2014) calls attention to the emotional burden carried by teachers and students as they encounter difficult knowledge in the curriculum. Specifically he highlights the "hegemonic pedagogies of emotion"—such as examining the emotional consequences of naming groups as oppressors or oppressed—that deeply influence the affective struggles taking place in classrooms and schools (p. 406). He cautions for a need to attend to the emotions and emotional limits people encounter in difficult historical knowledge when doing critical social justice work, warning against a purely rational approach to historical critique when approaching the past through critical pedagogy.

In sociocultural theory, learning about the past happens in relation with others, and often meanings constructed from witnessing testimonies of trauma are shaped by the discourse that students engage with in the classroom (Gaudelli et al., 2012; Sheppard, 2010; Zembylas, 2006). Simon and Eppert (1997) discuss the necessity of creating communities of memory that support the study of and response to testimonies of suffering:

> An ethical practice of witnessing includes the obligation to bear witness—to re-testify, to somehow convey what one has heard and thinks important to remember. Communities of memory are locations in which such obligations can be worked out. More specifically, they are productive spaces in which to name, distribute, produce, and practice expressive resources that enable a witnessing which establishes living memories. (p. 187)

Zembylas (2006) also writes about creating classrooms where peers build community through discussion of past atrocities and the relationship between emotions, nationalism, ethics, and politics, the rationale being to create transformative spaces where moral response and action are supported and encouraged through communities of memory.

The considerable efforts to create policies, resources, and curriculum to better teach the Holocaust around the world are significant and point to the unique place of the Holocaust in history education. The prevalence of tying Holocaust education to moral reasoning, civic engagement, and human rights education highlights the expectation that learning about suffering carries transformational possibilities. Despite the extensive work done to support the particular rationales for teaching of the Holocaust, Holocaust education remains contextual, dynamic, and evolving. In this, teaching the Holocaust is not unique. The countless traumatic histories that shape the histories of people and places around the world require attention to the role of place, identity, temporality, and other contextual factors. In these endeavors that engage students in learning about, and at times

bearing witness to, extreme, systemic violence and oppression, attention must be given to the emotional nexus of the subjective, political, moral, and social selves in learning about and from difficult histories. Making sense of these histories has significant consequences for how societies define themselves and create present and future realities for the groups that constitute them. As difficult knowledge theorists demonstrate, the individual's encounter with suffering can be fraught with psychical entanglements.

The psychosocial complexity of encountering the suffering of others limits the construction of single narratives that deliver a clear moral to painful histories (Britzman, 1998; Garrett, 2014; LaCapra, 2001; Simon & Eppert, 1997; Tarc, 2011). The crises (see Felman, 1992; Garrett, 2014) that students and teachers face in the pedagogical encounter with extreme suffering and oppression result in breakdowns of understanding that have the potential to resist and deflect clear lessons about the past. The internal conflicts that students encounter through engagement with historical traumas and suffering are accompanied by emotions, some of which remain hidden and others shared—or even spill over into the public space of the classroom. How should a teacher respond when a students' subjective, emotional engagement (be it depression, denial, anger, or boredom) with difficult knowledge in a well-crafted lesson, created with a clear rationale and with accurate and engaging resources, does not align with the planned-for outcome? Not knowing how to respond to emotions and the uncertainty of the significance of the encounter troubles teachers and students alike.

There is limited research demonstrating that learning about the Holocaust leads to actions that reflect increased moral reasoning, ethical thinking, commitments to social justice, or civic engagement (Barr et al., 2015; Fine, 1995; Schweber, 2004). This does not mean that goals of teaching for human rights, moral reasoning, empathy, and social justice through encounters with difficult knowledge should be abandoned, but rather that the fragility and uncertainty of learning in the classroom about and from systemic violence must be acknowledged and supported. A central confounding feature of teaching and learning difficult histories is the emotional response to witnessing suffering.

Given the fragility and uncertainty surrounding the teaching and learning of difficult histories, we continue the call made by Britzman (1998, 2000) and many since (Garrett, 2011, 2014; Pitt & Britzman, 2003; Tarc, 2011; Zembylas, 2006; 2014) to acknowledge the internal conflicts that accompany the larger social goals of learning from the suffering of others. Teachers need support in learning how to do this complex work, from crafting meaningful rationales for teaching particular difficult histories to developing classroom communities that support critical analysis as well as emotional engagement (LaCapra 2001; Zembylas, 2006). Accepting the uncertainties that arise in student understanding when encountering difficult knowledge requires confronting or letting go of strong attachments and systemic requirements to ensure students acquire shared historical knowledge and narratives of the past in history classrooms. This is challenging for teachers as it requires confronting personal beliefs and institutional requirements (Gaudelli et al., 2012). Creating learning environments that are open to and supportive of the unsettlement of personal, social, and national identities and histories that may accompany witnessing historical suffering

requires what Garrett (2012) calls a responsible pedagogy that is aware of the crises that can arise in such learning environments. Tarc (2011) calls for *reparative curriculum* that supports the production of historical accounts in pedagogical encounters and that asks students to encounter the unknown other's experiences of violence and loss in order to better understand their own social and political realities. Those who approach learning from the past from a sociocultural perspective also call for a pedagogy that attends to the narrative structure of how history is created and recreated in its teaching and learning and is responsive to the experiences of students who are in the process of simultaneously interpreting personal and official histories (Barton & Levstik, 2004; Epstein, 2001, 2009).

The constructed nature of difficult histories reveals the significance of context and identity in determining the intended, enacted, and experienced curriculum. The fluid nature of how difficult histories are constructed and interpreted requires a relational approach to knowledge building (Gaudelli et al., 2012; Sheppard, 2010). Crises in learning, unsettled knowledge about self and place and others—these are learning experiences that need to be supported through open discussion and shared sense of commitment to the work of interpreting the past. As schools teach the difficult histories that shape the lives of students—or attempt to make relevant to students' lives more distant historical events, such as the Holocaust to students in the US—teachers need to be able to talk about the issues at the heart of the difficulty, which are often related to race, religion, class, and gender.

The implications for accounting for the significance of difficult knowledge in history education are therefore quite extensive. In looking at the literature on the Holocaust, we have an example where significant rationalization and curriculum and resource development have taken place. While we know that teachers are teaching the Holocaust, little research has been conducted to better understand how teachers are teaching and what students are learning (Schweber, 2011). Therefore, further research into existing cases of teaching and learning the Holocaust and other difficult histories are needed to better understand what is happening in classrooms and what students are learning. Given the paucity of research into the role emotions play in teaching in learning history (Sheppard, Katz, & Grosland, 2015), particular attention should be given to how emotions come into and move through teaching and learning difficult histories.

The development and availability of curriculum resources is imperative to supporting teachers who want to address locally significant difficult histories. The significance of professional development in supporting teachers in this work cannot be understated (Barr et al. 2015; Gaudelli et al., 2012). Finally, working with teachers, districts, and states to develop meaningful assessment of historical understanding will play an especially important role in supporting teachers who aim to create learning environments that support students as they bear witness to suffering. Supporting student experiences of unsettlement, working toward hopeful action and transformation, requires innovative and flexible forms of assessment that do not easily fit into the increasingly standardized approaches to assessment that are currently available.

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Section IV

History Education: Practices and Learning

15

History Teacher Preparation and Professional Development

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This chapter synthesizes, reviews, and assesses the current empirical research literature on the education of history teachers. Our task is complicated both by the enormity of the topic—initial preparation *and* professional development in the United States and in the international context—as well as the specificity (*history*, not social studies broadly). The topic is important, however, as evidence suggests that a well-prepared, effective teacher matters and makes a difference in student learning and in how students experience school (see Ball & Forzani, 2010; Bransford, Darling-Hammond & Le Page, 2005; Desimone, 2009; Sanders & Rivers, 1996; Smith & Niemi, 2001; Stronge, 2002). Yet, as Lee (2011) argues, "while classroom activities really do matter, they can be futile unless they fit into a clear conception of what history education ought to be, which in turn rests on reflexive knowledge of the nature of history, and on empirical evidence about learning" (p. 63).

The "diversity of cognition and learning models" in history education, as Ercikan and Seixas (2015) observe, includes a "spectrum" of approaches and philosophical orientations to declarative knowledge (content) and procedural knowledge (often referred to as historical thinking) that vary within and between contexts (p. 256). Barton and Avery (2016) similarly describe the learning goals associated with history education as "multiple and contested" (p. 1001). Our assessment of the literature on initial preparation and professional development of teachers in history education indicates that there does not appear to be a clear, shared conception of what history education ought to be and that empirical research on both topics remains, to borrow from Adler (2008), "particularistic" and unsystematic (p. 346) and rarely linked to students' learning in history classrooms (Cuban, 2016; De La Paz, Malkus, Monte-Sano, & Montanaro, 2011; Monte-Sano & Reisman, 2015).

This lack of clarity about the purposes and outcomes of history education is situated within a broader educational landscape of research on teacher

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preparation and professional development in the US that is calling for attention to and articulation of effective teaching practices, or as Ball and Forzani (2009) argue, a "shift from what teachers know and believe to a greater focus on what teachers do" (p. 503). Referred to as *core practices* (Forzani, 2014; Grossman, Hammerness, & McDonald, 2009) or *high leverage teaching practices* (Ball & Forzani, 2009), the call to identify shared conceptions and a coherent language of teaching practice is framed as a way to create a closer relationship between research on teacher education and research on teachers' professional learning and development in order to bridge the gap between research and practice (McDonald, Kazemi, & Kavanagh, 2013). This work is viewed as a shift from past research on effective teaching that focused on the knowledge base of teachers (e.g., Shulman, 1986) and the role of reflective decision making grounded in disciplinary learning. Ball and Forzani (2009) note that "this does not mean that knowledge and beliefs do not matter but, rather, that the knowledge that counts for practice is that entailed by the work" (p. 503).

This work is just beginning, and all involved recognize that the "decomposition of practice" (Grossman, 2011, p. 2839), the identification of patterned, predictable, and generalizable core tasks of discipline-specific instruction found within the inherently uncertain "interactional, improvisational work" (Forzani, 2014, p. 360) of teaching, is challenging. It becomes especially challenging given the interactional relationship between individual teachers, school support structures, and teacher learning activities across subject areas and contexts (Opfer & Pedder, 2011a, 2011b). Yet, as Fogo (2014) observes, "researchers agree that if teacher education and professional development are to support ambitious teaching, effective practice needs further identification and description" (p. 152). In this chapter, we employ this notion of "core tasks that teachers must execute to help pupils learn" (Ball & Forzani, 2009, p. 497) as a lens through which to help focus our thinking and to reflect on the status of the research on history teacher preparation and professional development in the US and other parts of the world.

We chose to organize our chapter in a way that takes what Sears (2014) refers to as "the long view of teacher education" by following the learning progression of a teacher from initial preparation to inservice professional development (p. 20). We close with conclusions and implications for teacher learning (for both initial preparation and professional development). We initially searched for and reviewed research published since circa 2008, when chapters in the *Handbook of Research on Social Studies Education* by Adler (2008) and van Hover (2008) addressed the status of the research on initial certification and professional development of social studies teachers, respectively. We recognize that those chapters did not explicitly address international contexts and that they focused on social studies writ large, not history specifically. Care does need to be taken in claiming a direct or pure lineage to previous work focusing specifically on social studies teacher education (Adler, 2008; Banks & Parker, 1990) and social studies teachers' professional development (Armento, 1996; van Hover, 2008), but they offer an entry point into the literature.

History Teacher Preparation

In 2008 Adler characterized the status of the research on teacher education in social studies as mostly focused on "individualized studies of particular practices" with few linkages to the larger picture of teacher preparation across contexts (p. 346). She noted that the field was also "confounded by the persistent lack of consensus about the meaning of social studies itself" (p. 329). We argue that the same could be said of research that focuses specifically on history teacher preparation: research is particularistic (specific to a particular context) and unsystematic, with little empirical work that focuses on the enactment of history practice and the impact those practices have on student learning. Many educators and some researchers in the US often use the terms social studies and history interchangeably, an issue that creates a challenge in assessing the literature and highlights the well-worn but ongoing debate around definitions of social studies and where and how the discipline of history fits into the school curriculum and into teacher preparation programs (see Cantu, 2008; Warren & Cantu, 2008).

The research that does focus specifically on history teacher preparation, however, also suffers from a lack of clarity about what precisely high-quality preparation of history teachers entails. Multiple goals are articulated for teacher education (e.g., Davies, 2011; Sandwell & von Heyking, 2014; Warren & Cantu, 2008): preparing teachers to teach history for citizenship, to teach historical thinking and historiography, to teach disciplinary literacy, to teach historical consciousness—and very little work identifies core practices that reflect those goals or that have been demonstrated to support student learning in history classrooms (Fogo, 2014; van Hover, Hicks, & Cotton, 2012). Also, teacher education in the US and abroad is highly contextual. Zuljan and Vogrinc (2011) note that that while different systems of teacher education may share the common goal "to find solutions that lead teachers to quality and durable knowledge and assist them in their professional and personal formation and in their active inclusion in society," how different systems approach this goal "is not transferable from one country to another," rather their approaches are culturally specific (p. 8). We explore these and other issues first in the US and then in international contexts.

History Teacher Preparation in the US

The question of how best to prepare teachers for K-12 classrooms is part of highly politicized debates taking place in the US at the national level (e.g., Boyd, Grossman, Lankford, Loeb, Michelli, & Wyckoff, 2006; Conklin, 2010; Horn, Nolen, Ward & Campbell, 2008). Cochran-Smith and Fries (2001) describe the sides or, as they characterized them, competing discourses as the agenda to "professionalize teaching and teacher education" and the movement to "deregulate teacher preparation" (p. 3). While there is fierce disagreement about the best path to the classroom, most agree that the field as a whole lacks a strong research base. Research on teacher preparation, Grossman and McDonald (2008) argue, is

still in its "adolescence, in search of its distinctive identity," and they assert that in order for the field to move forward it has to "face some uncomfortable realities" (p. 185). In the broader field of research on teaching, as well as in teacher education, there exists "a lack of common technical vocabulary with which to describe the work of teaching" (p. 185). Particular acts of teaching (for example, teachers' responses to student thinking) are referred to in many different ways without agreement as to how to identify and describe the core practices that have been demonstrated to have impact on student learning. Grossman and McDonald assert that research in teacher education should move beyond a focus on the "cognitive demands" of teaching to a focus on teaching as a practice, to "preparing novices for the relational as well as the intellectual demands of teaching" (p. 185). Finally, the influence or role that context plays in teacher preparation should be attended to by considering the interactions of multiple (and often conflicting) policies at the national, state, and local level. This complex "nexus of multiple institutional and policy contexts" requires an "organizational perspective that has been missing in research on teacher education" (p. 186).

The realities identified by Grossman and McDonald (2008) certainly apply to the field of history teacher education. Most empirical research focuses on exploring the knowledge base or the thinking of teacher candidates and rarely extends to how the enactment of practice within specific contexts affects student learning, the relational or contextual aspects of teaching, or the history learning of students in K-12 classrooms. While nascent attempts at identifying core practices in history are emerging (see Fogo, 2014; Reisman & Fogo, 2015; van Hover, Hicks, & Cotton, 2012), the field of history teacher preparation lacks a common, agreed-upon technical vocabulary. Context also plays a role in the field—state and local requirements for teacher licensure often exert the strongest influence on the course requirements, and emphases of individual teacher education programs and requirements vary state to state (Bransford, Darling-Hammond, & LePage, 2005; Martin, Maldonado, Schneider, & Smith, 2011). Martin et al. (2011) noted that "variation within and across states makes it difficult to comprehensively characterize state requirements" for history teachers and that public data about "subject-specific licensure requirements is often hard to locate" (p. 36). While some work has attempted to explore the role federal, state, and local policies play in history teacher education (Warren & Cantu, 2008), the organizational perspective is missing.

Despite these uncomfortable realities, there is a growing body of work that adds interesting insight into the context, content, and structure of history teacher education (e.g., Bain, 2012; Bain & Mirel, 2006; Cantu, 2008; Conklin, 2008, 2009, 2010; Drake, 2008; Warren, 2008); different approaches to the history methods course (e.g., Baron, Woyshner, & Haberkern, 2014; Kiern, Luhr, Escobar, & Choudhary, 2012; Lovern, 2012; Martin, 2012; Martin & Monte-Sano, 2008; Westhoff, 2012); what preservice teachers know and how they make sense of history or historiography (e.g., Fallace, 2007; Harris, 2014; Harris & Girard, 2014; Monte-Sano, 2011; Monte-Sano & Cochran, 2009; Salinas & Castro, 2010); preservice teachers' reflection and reflective decision making (e.g., Hunter, 2012; Jaffee, Marri, Shuttlesworth, & Hatch, 2015); preservice teachers' use of technology in the teaching of history (e.g., Lee & Molebash, 2014); preservice teachers'

understanding of history assessment (e.g., Brown, 2013); and the challenges of learning to teach or enacting history instruction in varied contexts over time (e.g., Hicks, 2008; Horn et al., 2008; Martell, 2013). The most extensive body of empirical work that focuses specifically on history teacher education (rather than social studies) explores preservice teachers' thinking about and knowledge of history, how preservice teachers' thinking (or knowledge) about history influences the assignments they complete in methods classes, their thinking about students' historical understanding, and/or their curriculum decision making in student teaching placements.

Harris (2014) examined the thinking of history teachers by exploring how preservice and practicing teachers organize and connect world history concepts and events. She was interested in whether there were differences in how teachers connect world history concepts and events for themselves versus how they planned to do so for their students. She also explored whether differences would emerge between the preservice and inservice teachers participating in her study. Harris asked four preservice teachers and five practicing teachers to engage in two card-sorting tasks in which participants were first asked to arrange (while verbally thinking aloud) a set of 22 cards in a way that made sense to them and then to rearrange them to reflect how they would "organize the cards for instruction in a world history classroom" (pp. 344–345). She found that practicing teachers were able to make more event-to-event connections across time and space and that the preservice teachers struggled to make those connections and to identify larger global patterns. The practicing teachers who did best had been involved in extensive world history professional development that included a focus on global perspectives. Harris argues that her findings indicate that "world history teachers need explicit practice in organizing large expanses of time and space in a coherent way and engaging students in making cross-cultural or cross-regional comparisons, causal connections, and connecting events to larger global patterns" (p. 365) and that teacher educators should help preservice teachers in particular attend to organizational schemes in world history as well as connections between events within those schemes (p. 365). Harris suggests that the card-sorting activity helps preservice teachers make their thinking visible and that misconceptions can be addressed through this task. A similar study explored how the card sorting activity could also provide empirical insight into preservice teachers' understandings of historical significance (Harris & Girard, 2014).

While the interesting work of Harris and Girard (2014) offers insight into preservice teachers' thinking about world history and historical significance, they purposefully interviewed students in isolation of a methods course or student teaching practice. Other work explores what teacher candidates learn in and how they make sense of history teaching in their methods classes and student teaching placements. Monte-Sano and Cochran (2009), for example, explored how two preservice teachers think about adolescents' historical reading and reasoning and whether their understanding of their students, the discipline, and their students' disciplinary knowledge influenced their instructional decisions (p. 106): They found that one preservice teacher focused on reading comprehension and student engagement while the other emphasized students' understanding of history and historical ways of thinking and reading (p. 127). Monte-Sano and

Cochran suggest that while both preservice teachers possessed knowledge associated with effective teaching, the differences in their knowledge and understandings of history influenced their sense-making about students' thinking about history and teaching about the nature of history. They also noted that the two preservice teachers had experienced different teaching contexts (and very different mentor teachers), which may have played a role in how they practiced or enacted information learned in the methods course.

As part of the same ongoing study, Monte-Sano (2011) explored three preservice teachers' pedagogical content knowledge. She examined the ways in which they constructed tasks that required their students to engage in interpretive and evidence-based thinking both in the methods course and in the field classroom (p. 260). Data analysis indicated that the three preservice teachers possessed very different conceptions of history and that one (Gabrielle) emphasized both interpretive and evidence-based thinking in the classroom while another (Lily) focused more on interpretation and the third (Anna) emphasized neither (p. 268). Monte-Sano asserts that "in addition to subject matter knowledge, Gabrielle's teaching demonstrates key aspects of PCK [pedagogical content knowledge]" (p. 270). Strong disciplinary understanding and the context of her teaching placement seem to have helped Gabrielle quickly develop PCK, while weak disciplinary understanding and field placements in classrooms that did not promote historical thinking complicated Lily's and Anna's development of PCK. These research studies, Monte-Sano suggests, call for continued research that explores the development (or lack thereof) of PCK and the role methods courses, methods assignments, field experiences, and their associated contexts play. This thoughtful line of longitudinal research offers rich insight into preservice teachers' learning over the course of a teacher education program, whether their thinking changes as a result of their experiences in a history-specific pedagogy course, and whether (and how) they enact practices learned in the methods course, and preservice teachers' thinking about their own students' historical thinking.

A small body of research explores how the background and personal experiences of preservice teachers influence their thinking and teaching of history. Salinas and Castro (2010) traced the influence of cultural biographies on the curricular decision making of two Latino preservice teachers in their teaching placements in a standards-based setting. Jose, assigned to teach World History II, and Clemente, teaching a U.S. history class, both "drew on their personal and cultural experiences to disrupt the 'official' curriculum, which they believed failed to address fundamental issues of race and inequity" (p. 428). Salinas and Castro acknowledge that not all Latina/o teachers adopt an oppositional stance like that of Jose and Clemente and call for more research on the "nuances of cultural experience and its role in curriculum decision-making" and differences in teachers of color (and those from an Anglo-American background) "who do and do not adopt oppositional stances" (p. 450). Salinas and Castro suggest that history teacher educators can provide opportunities for preservice teachers to analyze and challenge the official curriculum, to explore multicultural knowledge and counter-narratives, to explore the role of ideology/power/narrative in the construction of curricular materials, and to engage in dialogue and reflection on the role of personal biographies in curriculum decision making (p. 451).

In sum, an interesting emerging line of empirical research from the US explores different components of teachers' candidates' thinking about and learning to teach history and historical thinking. This work offers insight into how (and whether) teachers' knowledge and understandings of history and historical thinking change over time in methods courses and in teaching placements (e.g., Monte-Sano, 2011). It should be noted that most of the strongest empirical work on teacher education in the US falls under the umbrella of social studies (e.g., Conklin 2008, 2009, 2010), and it is difficult to parse out or disentangle the work on history from the research on social studies. This is by no means the fault of the field, more a reflection of policy context of licensure and teacher preparation in the US.

History Teacher Preparation: International Contexts

Empirical work on history teacher education internationally is exceptionally limited.

Rather, a body of rich theoretical work explores interesting questions about the nature and purpose of history education (see Davies, 2011; Kölbl & Konrad, 2015; Köster, Thünemann, & Zülsdorf-Kersting, 2014; Sandwell & von Heyking, 2014; van Boxtel, Grever, & Klein, 2015). There also is widespread recognition that, as in the US, history teacher preparation is highly contextual and does not have clearly articulated (and agreed-upon) goals.

A recent comparative study of 33 countries of the European Higher Education Areas examining the concepts, structures, and standards of preservice teacher training in civics and history paints a complex and heterogeneous picture of initial history teacher preparation (Ecker et al., 2013). Ecker et al. (2013) suggest that partly missing within the education of civic and history teachers are clear theoretical foundations and conceptions of educational goals: "Common guidelines or standards as concerns the goals, the content and the methodology in teaching the CHE-subjects [Civic History Education] are not that much visible so far" (p. 104). The high level of heterogeneity in terms of history education research, including the minimal amount of research focusing on history teacher education across a number of countries and regions including Germany, Spain and Latin America, Switzerland, Poland, Austria, Finland, France, Switzerland, Canada, England, US, and Netherlands, is similarly reflected in Köster et al. (2014).

Within the context of the United Kingdom, Taber (2010) suggests that one specific element of initial teacher training that has emerged (especially within postgraduate education with formal university–school-based partnership) is preparing teachers who see themselves as members of an

> evidence-led and research-based profession: that is that teachers should be expected to both be aware of relevant research about teaching and learning, *and* to also be capable of undertaking small-scale classroom research to address professional issues and problems that arise in their work. (p. 20)

There is a small body of research that goes beyond simply studying preservice teachers' conceptions and understandings of history or associated second-order

concepts to examining and detailing the development of history teachers as researchers and curriculum theorizers. For example, Counsell (2013) examined the ways history mentor teachers, working with the postgraduate teacher education program at the University of Cambridge, use academic and professional literature with their trainee history teachers. This interesting line of inquiry explores the importance of bridging the gap between theory and practice in history education. Counsell's case study identified various ways that mentors and their mentees leveraged academic literature to talk about and inform their conceptions of practice within their classrooms. While previous work by Pendry and Husbands (2000) suggested that preservice teachers during their postgraduate professional education (PGCE) year had minimal engagement with academic history education texts, Counsell's case study of one PGCE program offers a more positive picture of the preparation of teachers who will see teaching as a research-based profession. However, as Counsell notes, her research was set within one specific context with mentors who had long associations with the program and suggested that much more research within this area clearly needs to be done. Nevertheless, such work stands out in comparison to the typical research in the US and Europe that either details what history teachers should know about history and the teaching of history (see Husbands, 2011), offers stories/case studies of history teacher educator's practice, or solely seems to extend the work done on students conceptions/ideas of history to preservice teacher conceptions and understandings of the content/skill of the discipline of history (see Kropman, van Boxtel, & van Drie, 2015).

One comparative case study offers insight into the role of international contexts in history teacher preparation. Hicks (2008) examined how two preservice history teachers' conceptions of history and their emerging construction of self as history teachers during their internship settings within different national educational contexts (UK and US) shaped their everyday pedagogical performances. The case study reveals the naivety of assuming a common understanding of what it means to know history and become a history teacher within different contexts. The study illuminated how the participants' biographic conceptions of both history and history teaching served as a filter through which the differing expectations of their respective history curriculum and of their cooperating teachers and departments, and ultimately their perceptions of their own students, were mediated and negotiated. For both participants, their initial visions of history as either a skills-based discipline heavily focused on source analysis (UK) or a content-based discipline heavily focused toward a heritage approach (US) were tempered by the realities of their respective classrooms when faced with a class of diverse students. Despite their attachment to different approaches to teaching history, their eventual gauge of successful student learning coalesced around the extent to which their respective students were either able to remember the steps to sourcing documents as a diluted form of disciplinary knowledge (UK) or how well they could remember the facts and dates of history as re-presented by the teacher based on the classes' history textbook (US).

In Canada, teacher preparation also is highly reflective of context, as in many provinces history is taught within the context of social studies education (Christou, 2014; Pollock, 2014) and teacher education programs, curricula, and

history pedagogy courses are conceptualized and structured in different ways (e.g., den Heyer, 2014; Duquette, 2014; Lévesque, 2014; Seixas & Webber, 2014). There also is an extensive body of work that offers interesting theoretical, practical, or descriptive insight into ways of thinking and engaging in history teacher preparation (e.g., Case & MacLeod, 2014; Gibson, 2014; Myers, 2014; Sears, 2014; Sandwell & von Heyking, 2014). Pollock (2014), reviewing the status of the research on historical thinking and preservice teachers' education, also borrowed from Adler (2008) in describing such research as "particularistic," with few studies building on each other, studies that suffer from methodological shortcomings, and a lack of focus on preservice teachers' identities. He raised questions about the overemphasis on individual thinking "as the engine of instructional change" (p. 68) and called for more research across contexts that explored the history preparation in historical thinking. Sears (2014) similarly calls for more research on history teacher preparation and argues that teacher education should be thought of as a "three-stage process: the learning and experiences that occur prior to the professional program; the actual teacher education program itself; and finally, on-going in-service teaching and professional development" (p. 20).

Professional Development

Educational reformers in the US and in international contexts consistently call for high-quality professional development opportunities as a means for teachers to improve instructional practice in order to maximize student learning (see Borko, 2004; Haskings-Winner, 2014; Husbands & Pendry, 1998; Kennedy, 2016; Opfer & Pedder, 2011a). As Kennedy (2016) observes, "the idea that professional development can foster improvements in teaching is widely accepted" (p. 945). Yet, actual implementation of professional development varies widely within and between nations, as does the research on professional development (see Bautista, Wong, & Gopinathan, 2015; Desimone & Garet, 2015; Lam, 2015; Ling & Mackenzie, 2015; Martín, 2015; Niemi, 2015). Some evidence points to the efficacy of targeted, subject-specific professional development that is sustained, content-focused, active, collaborative in nature, ongoing, attentive to context in terms of school and curricula standards, focused on student thinking and learning, and that includes some element of instructional coaching or specific feedback (see Borko, 2004; Darling-Hammond, Wei, Andree, Richardson, & Orphanos, 2009; Desimone, 2009; Sun, Penuel, Frank, Gallaher, & Youngs, 2013). Other frequently cited design features of high-quality professional development include attention to adult learning theories and contextually appropriate learning strategies such as reflection, peer feedback, observation, instructional coaching, analysis of student work, development of teacher professional learning communities, and small-group discussion (Borko, 2004; Darling-Hammond et. al, 2009; Desimone, Porter, Garet, Yoon, & Birman, 2002).

However, Kennedy (2016) asserts that much of the research on design features or the use of specific techniques fails to account for the underlying overarching theories, purposes, or premises that inform how professional development can improve teaching. She conducted a rigorous review of 28 studies that met five

criteria: (1) focused only on professional development; (2) included evidence of student achievement; (3) included study designs that controlled for motivation to learn; (4) had a minimum study duration of one year; and (5) the researchers followed teachers, rather than students, over time. She found that certain program design features (including duration, topic, intensity, number of contact hours, learning activities, collective participation)—widely accepted components of high quality professional development—were "unreliable predictors of program success" (p. 971). Additionally, programs that focused exclusively on content knowledge (as opposed to content knowledge for broader purposes, like inquiry or exposing student thinking) had less effect on student learning. She argues that her findings suggest that rather than focusing exclusively on a list of program design features, teacher educators need to offer professional development programs "based on a more nuanced understanding of what teachers do, what motivates them, and how they learn and grow" aimed at "intellectually engaging teachers with professional development content" and at promoting "real learning" (p. 974). Other researchers concur, calling for professional development that is contextually situated, attentive to core practices and the enactment of those core practices in complex contexts (Grossman & McDonald, 2008), and that recognizes the many ways in which teachers learn (Borko, 2004). Opfer & Pedder (2011a), for example, argue that, "much of the research on professional development has yielded disappointing results with teacher professional learning activities often being characterized as ineffective" (p. 376) and note that much of the extant research focuses on specific "activities, processes, or programs in isolation from the complex teaching and learning environments in which teachers live" (p. 377).

In 2008 van Hover characterized the status of research on professional development in social studies education as "idiosyncratic" and asserted that there existed "no big picture of social studies professional development across the [US]" (p. 355). Additionally, she noted that very few studies focused on the impact of teacher professional development on student learning. We argue that that this largely continues to be the case both in the US and globally, with the research in history education reflecting the issues raised by Borko (2004), Opfer and Pedder (2011a, 2011b), and Kennedy (2016). However, since 2008 some very interesting developments have taken place with a number of high-quality studies exploring the impact of history-specific professional development programs or curriculum interventions on student learning (e.g., De La Paz, et al., 2011; Howell & Saye, 2016; Patterson, 2015; Ragland, 2009, 2015; Reisman, 2012a, 2012b; Reisman, 2015; Saye, Kohlmeier, Brush, Mitchell, & Farmer, 2009). Yet, the field continues to struggle with articulation of purpose—how history and inquiry are defined, for what purposes history should be taught, how history should be taught, and most importantly how, why, and in what ways teacher and student outcomes should be assessed (see Cuban, 2016; Lee, 2011; Ercikan & Seixas, 2015). As Husbands and Pendry (1998) observe,

> all commentators take as the starting point the ultimate goal of professional development to be enhancing the quality of teaching and thereby the quality of learning by pupils. But once this rather obvious goal is stated, consensus of how to achieve this breaks down. (p. 125)

These debates influence the nature and structure of professional development and affect the ability of the field to collect meaningful data that assess impact of *teacher* learning opportunities on *student* learning opportunities. Additionally, the nature of and approach to professional development varies across (and within) U.S. and international contexts, and the research is unevenly distributed.

As with the extant research in teacher education, disentangling research on history professional development from research on social studies professional development presents a challenge. The program that has arguably generated the most attention to history professional development during the past decade in the US is the Teaching American History (TAH) program, and it offers a logical starting point. We then move to what Cuban (2016) refers to as "new, new history" professional development programs in the US that emerged from the ashes of the TAH program, and close with an assessment of the literature from international contexts.

History Teacher Professional Development in the US

In the US in 2001, the passage of the TAH legislation led to a massive (and unprecedented) influx of federal funding intended to create professional development programs designed to raise student achievement by improving teachers' knowledge, understanding, and teaching of traditional American history. This program, defunded in 2011, poured over $900 million dollars into history professional development over the course of a decade. The long-term impact of these grants, however, remains debatable, and few systematic studies have investigated how these programs affected teachers' classroom instruction or student achievement (Cuban, 2016; Humphrey, Chang-Ross, Donnelly, Hersh, & Skolnik, 2005; van Hover, 2008; Weinstock, Tseng, Humphrey, Gillespie, & Yee, 2011).

In 2008 van Hover observed that the majority of publications generated from TAH grants were descriptive in nature, offering in-depth accounts of the overarching purpose or objectives of a particular grant, structure of the grant, type of professional development provided, or anecdotal/self-reported evidence about participants' experiences and learning. Since then a number of publications have followed this same structure but added data including teachers' lesson plans (or lesson studies), reflective statements, or evaluation surveys (see for example, Abt-Perkins, 2009; Halvorsen & Lund, 2013; Knupfer, 2009; Ryan & Valadez, 2009). This collective work provides interesting insight into individual TAH grants and offers evidence that teachers enjoyed participating in grant activities and reported learning a great deal (e.g., Ragland & Woestman, 2009). Substantive, informative, and creative suggestions about how to teach teachers to use primary sources in curricular planning and to engage in disciplinary thinking and practice are presented, as well as lessons learned for future professional development programs to consider (Fillpot, 2009; Gerwin, 2009; Halvorsen & Lund, 2013; Mandell, 2008; Owen & Barbour, 2009; Rives, 2009; Ryan & Valadez, 2009; Seligmann, 2009; Westhoff, 2009; Wood, 2012). This work also highlights the power of collaboration between historians, archivists, teacher educators, museum educators, and classroom teachers and disseminates document-based lessons created by teachers as a result of these collaborations (Abt-Perkins, 2009;

Gerwin, 2009; Hall & Scott, 2007; Knupfer, 2009; McCrainey & Moisan, 2009; Rives, 2009; Woestman, 2009). Some work offers insight into the complexity of evaluating these programs, both as they were being implemented and with regard to the short- and long-term impact on history teaching (Kortecamp & Steeves, 2006; Lai, Kearney, & Yarbrough, 2009; Ragland, 2009, 2015; Rook, 2009)

Very few empirical studies explore the effects of the professional development provided in TAH programs on student learning outcomes. As Wineburg (2009) observed, "with few exceptions, the connection that links our hefty investment in teacher professional development and verifiable gains in student learning remains elusive"—which led him to call for the development of reliable and cost-effective measures that would assess "students' understanding of history as an interpretive discipline, with analysis and critical thought at the center" (p. vi). Wineburg made similar comments at the annual meeting of the Organization of American Historians (OAH) (see Shenkman, 2009).

A study that answered Wineburg's call was conducted by De La Paz et al. (2011); the authors used multilevel models to investigate the impact of TAH professional development on students' written responses to document-based questions at 5th, 8th, and 11th grades and qualitative analyses of teachers' activities to examine connections between classroom lessons and student outcomes. De La Paz et al. identified and defined the desired student outcomes in terms of writing tasks, specifically "assessing students' historical thinking via their written arguments" (p. 497), and they focused the professional development provided through the TAH grant on providing participating teachers with targeted instruction in how to develop students' historical writing.

De La Paz et al. (2011) provide evidence that teachers who participated in more hours (at least 30 hours) of professional development over a sustained period of time had improved student performance on writing tasks. This study is significant in history education as the authors collected data on the depth and breadth of teacher participation in professional development and linked teacher learning (and enactment of particular practices) to student outcomes on a history writing assessment. Additionally, their findings indicate that low-level participation in professional development is not sufficient: teachers who invested over 30 hours and actively participated in professional development activities yielded the highest shift in student outcomes. These highly involved participants were able to focus on the skills of practice within their own contexts—to *enact* historical-writing instruction that, De La Paz et al. (2011) assert, is consistent with what has been called for by reformers like Ball and Forzani (2009) and Grossman et al. (2009). While other interesting empirical work on TAH programs adds insight into the role of lesson study (Halvorsen & Lund, 2013), teaching with historical sources (e.g., Kallemeyn, Schiazza, Ryan, Peters, & Johnson, 2013; Ragland, 2009, 2015), and student engagement (Duffield, Wageman, & Hodge, 2013), this research by De La Paz et al. represents one of the very few empirical studies to explore the influence of TAH professional development on the enactment of teacher practice in context and on student learning.

In terms of the collective effects of the TAH grants, two large-scale evaluation reports highlighted both the strengths and the weaknesses of the structure, implementation, and impact of TAH grants (Humphrey et al., 2005; Weinstock

et. al., 2011). Weinstock et al.'s (2011) report, published near the end of the grant program, focused on the 2004–2006 grant cohorts (a total of 375 grantees) and concluded that the TAH program led to "productive collaborations between the K-12 educational system and historians at universities, museums, and other key history-related organizations" (p. vii) in which teachers reported learning a great deal. This report adds that many of the professional development opportunities provided by these projects were identified as high-quality learning experiences and led to increased use of primary sources for the purpose of inquiry in teachers' lesson planning. The authors found "key areas in which TAH program practices aligned with principles of quality professional programs," specifically the development of meaningful partnerships, the attention to both history content and history pedagogy, and the development of teacher networks and learning communities (p. xi). Yet, the report also raised serious, fundamental questions about the impact of these grants, stating that "extant data available for rigorous analyses of TAH outcomes are limited" and that "TAH effects on student achievement and teacher knowledge could not be estimated for this study" (p. xi). The report characterized evaluations of TAH grants as "lacking rigorous design" and stated that the data provided by these reports were not of sufficient quality to support a "meta-analysis to assess the impact of TAH on student achievement or teacher knowledge" (p. xi).

Larry Cuban (2016) concluded of the Weinstock et al. (2011) report that

> when it comes to evaluating [TAH] efforts over a decade … the verdict was damning. The external evaluators who examined sixteen TAH programs found no evidence they raised student achievement or that teachers used the class-friendly lessons developed by TAH after they returned to their schools or that project directors created district networks of teachers to implement lessons. (pp. 92–93)

Cuban characterized the approach taken by TAH as a *collective-memory heritage* strategy that attempts to inculcate good citizenship through teaching the "official" story of the US aimed at inspiring pride and loyalty toward country (p. 91). Cuban argues that the heritage approach has conflicted (and contended) with what he terms the *historical* approach, "based on the idea that history is not a single account of the past but many accounts" and that students should be "equipped with intellectual and academic skills that historians and citizens use daily" (p. 93).

The "New, New History" and the SHEG

Recent efforts to engage in outreach and professional development on the historical approach, such as the Stanford History Education Group (SHEG), are termed by Cuban (2016) the "new, new history" (p. 95). The work of SHEG—the creation and dissemination of document-based lessons designed for teacher use in diverse classrooms—has generated interesting research that addresses the impact of professional development and curriculum resources on student learning in history classrooms. This work also has the potential to begin to provide empirical support to conversations regarding core practices in history education.

The SHEG program, spearheaded by Sam Wineburg and his doctoral students at Stanford University, offers a series of document-based history lessons designed to take into account the realities and rhythms of life in secondary history classrooms—to work within, not fight against, what Tyack and Tobin (1994) referred to as the "grammar of schooling" (p. 454). These classroom-ready lessons attend to both historical content and inquiry and are intended to "shift students' orientation toward historical knowledge by explicitly teaching them the strategies of disciplinary reading" and to develop students' literacy skills and reading comprehension (Reisman, 2012b, p. 239). SHEG's document-based lessons purposefully follow a predictable and repeatable activity sequence: (a) presentation of background knowledge; (b) historical inquiry with multiple documents (edited and modified for readability); and (c) discussion. Embedded in each lesson is explicit strategy instruction that highlights what Reisman (2012b) refers to as four strategies of expert historical reading: sourcing, contextualization, corroboration, and close reading (p. 244).

Reisman (2012a) conducted a study that employed a quasi-experimental control design to measure the effects of implementing SHEG document-based history curriculum over six months on students historical thinking; students' ability to transfer their historical thinking strategies to contemporary problems; students' retention of factual knowledge about history; and growth in students' general reading comprehension skills. She provided professional development training for teachers over a four-day period with two three-hour follow-up workshops during the six-month intervention. The professional development involved teachers working through six sample lessons with a particular focus on how to explain and practice "explicit strategy instruction for each of the discipline-specific reading skills" as the lessons required teachers to cognitively model for students how to read like historians (p. 95). The follow-up workshops involved video-based coaching and additional instruction in cognitive modeling and whole-class discussion.

The results of Reisman's (2012a) study indicated that, across school contexts and student demographics, students in treatment classrooms outperformed those in control classrooms on historical thinking measures as well as on measures of factual knowledge and reading comprehension. Teachers' fidelity of implementation was uneven, however. Certain elements of the curriculum, like the emphasis on sourcing, became habitual in some teachers' instruction. In other realms, particularly whole-class text-based discussion, teachers either struggled or avoided implementation. Reisman noted that to skillfully facilitate a text-based discussion teachers needed to be willing to cede the floor to students and also had to possess deep subject knowledge, awareness of chronology and historiography, and an ability to ensure students recognized their own historical positionality and avoided presentist arguments or judgments (p. 257). Successful text-based discussions occurred in only a "handful" of observed lessons. She also raised a crucial point about the assessment context in history education—that there is an "absence of usable assessments that measure disciplinary historical thinking" and that teachers will continue to "privilege memorization" in state policy contexts which assess history learning through fact-based multiple-choice tests. Such issues raise ways in which the curricular materials could be altered and training improved.

Reisman's (2012a, 2012b) work is significant in that it links professional development to student achievement and very clearly defines the student outcome measures under study—historical thinking, reading comprehension, literacy. Whether the document-based lessons program created by SHEG is sustainable is an open question (Cuban, 2016), but Reisman's initial research on this program demonstrates the potential of shifting the focus to enactment versus creation of lessons.

The "New, New History" and the PIH Network

Another program from a different philosophical orientation that could conceivably fit under Cuban's (2016) "new, new history" professional development umbrella is the work by John Saye and colleagues in developing the Persistent Issues in History (PIH) Network, which trains and supports teachers in employing the Problem-Based Historical Inquiry (PBHI) framework (Brush & Saye, 2000, 2008; Saye & Brush, 2006, 2007). PBHI "differs from historical inquiry as it is often practiced in that our motivating purpose for inquiry is not making meaning from historical artifacts but rather making decisions about enduring societal problems as they are instantiated in particular historical periods" (Saye et al., 2009, p. 9). PBHI is a research-based, technology-supported learning environment that has been under development with associated field-testing since 2000. Content resources and scaffolding tools are provided for teachers and students, designed to support students as they engage in authentic tasks that require weighing historical evidence and engaging in reasoning about "fundamental societal questions" (p. 9). The PIH network provides online and in-person professional development to support teachers who use PBHI.

In a 2009 study, Saye et al. explored how teachers interpreted PBHI's research-based framework, how mentoring support by the researchers influenced how prospective peer mentor teachers made sense of implementation of PBHI, and how serving in the role of peer mentor influenced teachers' own integration of the PBHI framework. Teachers attended a one-week summer seminar that taught them about the PIH framework and provided tools and resources for implementation. Participants in the study were recruited to serve as peer mentors for teachers who would attend that same seminar the following summer. The researchers worked with the identified peer mentors to conceptualize and implement units that employed PIH strategies and the associated technology-supported tools. Researchers created a set of "professional development scaffolds" to "assist teachers in planning from within the PIH professional knowledge framework and in dialoging with other project members about their thinking" (p. 13). The peer mentors also participated in a retreat designed to prepare the group to help introduce new teachers to the PIH framework.

Collecting data on the mentors' own PBHI teaching and the mentors' engagement in mentoring other teachers, Saye et al. (2009) found "promise for using modeling and scaffolding to assist teachers in linking theory to practice" (p. 6) but that epistemic stances or cultural assumptions about history that teachers entered the project with influenced how they made sense of and implemented

PBHI and the lens through which they mentored other teachers. Saye et al. found that asking teachers to critically observe and reflect on classroom video footage of their own practice offered a "shared context" to "de-privatize knowledge" and to "engage in genuine dialogue" about the challenges of translating theory into practice (p. 25). This study, as with Reisman's work, highlights the complexities of introducing a "holistic theory-based framework for practice into the school culture" (p. 33) but offers promise for using modeling, scaffolding, peer mentorship, and collaborative professional development. The work of Saye et al. and Reisman offers empirical support for the ways that "new, new history" professional development can affect teachers' practice and student learning.

History Teacher Professional Development: International Contexts

Outside the US, empirical research on professional development is thin and highly dependent on context. Peck (2014) described the status of research on professional development in Canada as "spotty and almost nonexistent" (p. 250). She conducted research on a two-year project that focused on "teaching teachers how to use a framework for historical thinking in two major urban centres in Alberta" (p. 253). Teachers attended five days of professional development over the course of the school year to learn about historical thinking concepts and use that knowledge to develop associated lesson plans, assessment tasks, and rubrics (p. 253). Peck recognized the tension of her own positionality as the provider of professional development and as a researcher, but in collecting and analyzing data on the project she found that a "well-structured, long-term professional development project can be highly effective" in increasing teachers' knowledge of historical thinking (p. 262).

In other English-speaking contexts, research on professional development is equally spotty. In the UK, research on professional development and the impact on student learning is scarce. However, recent work by Counsell (2011) and Fordham (2016) has highlighted a rich vein of history teacher research published in the Historical Association's highly influential *Teaching History* magazine. Using citation analysis of teacher-research articles between 2004 and 2013 published in *Teaching History*, Fordham (2016) illustrates how, in response to the nature and requirements of the National Curriculum, history teachers, while writing about professional development and detailing their own pedagogical practices, have also embraced the "third tradition of curriculum theorizing" (p. 143). The result is generalizable, focused, and sustained "publication discourse" that explicitly leverages a history teacher's own "pedagogical practice to explore, define, and elucidate the properties of history as discipline within the context of the national curriculum framework" (p. 136). Such "published theorizing" by history teachers for history teachers that explicitly connects the relationship between "one teacher's classroom, the centrally imposed curriculum model and the academic discipline of history," Fordham suggests, represents a vibrant powerful, coherent, codified, and transferable form of history teacher professional knowledge that is vital for the profession (p.147).

Teacher Learning: Where to Go From Here?

Our assessment of the extant empirical research on history teacher education and history professional development is that it remains uneven and specific to particular contexts. As Lee (2011) argues, "a sense of what history education should add up to seems curiously absent" (p. 64)—that is, most research reviewed in this chapter opens with definitions, or explanations of how that particular author conceptualized first- and second-order concepts in history, or definitions of historical thinking, or the purposes or goals of history education. Ercikan and Seixas (2015) note that

> historical thinking can be defined by different terms and mean different things in education circles around the world. The multiplicity of approaches to complex thinking in history should not be troubling, but it does require clear definitions of cognition and learning models on which assessments should focus. (p. 260)

We agree that complexity is inherent in any study of history but wonder whether the lack of agreement in the field should *be* troubling and suggest that, perhaps, some shared definitions, some shared language, would move research in the field forward. Lee (2011) and Reisman and Fogo (2015) suggest that closer attention to what it means to teach students disciplinary literacy, or historical literacy, offers a logical purpose or goal for history education.

The most exciting developments in research on teacher learning focus on literacy instruction—historical writing and historical reading—work that has added empirical evidence to support the idea that, with clearly articulated goals and purposes, targeted interventions can influence teaching and measurable change in student outcomes in history can occur (De La Paz et al., 2011; Reisman, 2012a, 2012b). This work views disciplinary literacy in history as a way to change the way students *read* and *write* about history, asking students to "read critically, evaluate the reliability of evidence, make connections with historical background knowledge, and ultimately participate in the creation of knowledge" (Reisman & Fogo, 2015, p. 162). Additionally, recent work by Fogo (2014) crosses boundaries between teacher education and professional development by seeking to identify core practices for history educators in the US.

Fogo (2014) conducted a three-round online Delphi panel survey with teachers, teacher educators, and educational researchers to take a step toward answering a key question: "What teaching practice impact students' ability to engage in historical analysis and understand the major explanatory accounts in history?" (p. 152). This work, intended to identify and define core history practices, resulted in nine teaching practices for historical inquiry:

- use historical questions
- select and adapt historical sources
- explain and connect historical content
- model and support historical reading skills
- employ historical evidence

- use historical concepts
- facilitate discussion of historical topics
- model and support historical writing
- assess student thinking about history. (p. 176)

Fogo (2014) observes that simply identifying, learning, and practicing core practices is not sufficient; rather, enactment of practice interacts with teachers' knowledge (of historical and historiographical content, of students) and the complex learning environments in which teaching takes place. He also recognizes that his work is a first step, that the very hard work of building definitions and models of practice follows, and that this would entail creating consensus in a field known for debate and disagreement over shared goals; it would also entail thinking collectively and carefully about what effective teacher educator pedagogies for these practices look like and considering how the relationship of knowledge of subject matter/students interacts with these teaching practices. This hard work aptly and carefully described by Fogo, we argue, is a necessary next step for the field.

Moving forward, we suggest that the field of history teacher learning writ large should embrace the directions for research articulated by Grossman and McDonald (2008). First, history educators should collaborate to "decompose practice" and articulate core practices that we know help students learn. Fogo's (2014) work is an exciting step in this direction. A shared language of history practice could promote a sense of professional autonomy as teachers enact practices in different contexts (in the US and abroad) with different curriculums. Second, "researchers need to move their attention beyond the cognitive demands of teaching" (Fogo, 2014, p. 185) and, while not losing sight of the knowledge base of teaching, to expand our view to include more attention to the relational work that goes on in highly complex contexts. Research on teachers' knowledge is absolutely necessary, but it has in history education and beyond "obscured the importance of other aspects of teaching"—hence the call for a shift to a focus on the clinical aspects of practice and how to support novices and practicing teachers as they develop skilled practice in context (Grossman et al., 2009, p. 273).

Third, we suggest that history education needs to employ thoughtful frameworks within which to assess and understand more fully the complex and diverse contexts in which teacher learning takes place. Our review indicates that context matters—that teacher education and professional development programs within a state in the US or within other countries can vary widely based on the policy contexts, on the status of history, on the requirements to become a teacher, and on the requirements to remain a teacher. Work that crosses contexts and attends to diversity (diverse backgrounds and diverse contexts) would be particularly powerful, as much of the current research appears to rely on convenience samples—preservice teachers in one's own program or practicing teachers participating in one's own professional development. While it is powerful to study the impact of what we do, clearer recognition of the role of the researcher as teacher educator or professional development provider would add an interesting layer to the research.

We also suggest that greater attention to the ways—and spaces—in which teacher learning takes place is necessary. Borko (2004) recommends employing a situative learning perspective, recognizing that teacher learning occurs in many "different aspects of practice, including their classrooms, their school communities, and professional development courses or workshops. It can occur in a brief hallway conversation with a colleague, or after school when counseling a troubled child" (p. 4). She notes that to fully understand teacher learning, researchers must attend to the multiple contexts in which teachers learn and account for the teacher as an individual learner, as well as attend to the "social systems in which they are participants" (p. 4). We view the next stage of research on history teacher learning as full of exciting possibilities, as an opportunity for generative conversations among researchers, teacher educators, and teachers.

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16

Teaching Practices in History Education

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Teachers often lament the swirl of activity around them, yet the teaching act itself is among the thorniest of human endeavors. Cohen (1989) declared teaching to be the "impossible profession" due to its complexity, nuance, and uncertainty. Evidence for that claim has only grown as today teachers face the challenges of high-stakes testing, value-added evaluation systems, and seemingly endless rounds of standards. Clearly there are challenges in teaching any subject matter, but teaching history—with its overwhelming volume of content, its ever-present potential for controversy, and its uneasy status within the school curriculum—is perhaps the poster child for Cohen's assertion.

Writing about teaching history is no less challenging. Is what defines "teaching practices in history education" only the instructional strategies that teachers use in the pedagogical moment? If so, how can one ignore the content behind those strategies and the sources teachers employ to support them? Where does planning fit in? The act of instruction presupposes some form of preparation, yet planning is no simple affair—in constructing their curriculum units and lessons, teachers need to consider their own and their students' knowledge of the topic, how the topic is treated in state or local curriculum documents, what time constraints are evident, what sources are available and how accessible they are to the full range of students, and how they will know if their students are understanding the material. This last point, of course, suggests that describing the teaching act also means considering the long tail of assessment. For teaching does not end when the instruction does—teachers must assess their students in both formative and summative fashion in order to determine whether any remedial instruction is necessary (Grant, 2017). Teaching history involves a tangle of ideas and actions, content and skills, planned activity and teachable moments, teaching and re-teaching.

Important research is being done in the field, so corralling that work into one chapter, while difficult, is well worth attempting. Rather than simply string together abstracts from the literature for each topic and subtopic, I decided to use the four dimensions of the Inquiry Arc described in the *College, Career, and*

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Civic Life (C3) Framework for Social Studies State Standards (National Council for the Social Studies, 2013) as the rhetorical frame for the chapter. Those dimensions are (1) developing questions and planning inquiries; (2) applying disciplinary concepts and tools; (3) evaluating sources and using evidence; and (4) communicating conclusions and taking informed action.

I chose this approach for three reasons. First, the Inquiry Arc provides an opportunity to group and address the salient topics in a coherent fashion rather than as a gloss. Second, the *C3 Framework*, while addressing the wider subject of social studies, gives considerable attention to the disciplinary field of history. Finally, I believe the Inquiry Arc offers considerable guidance for instructional practice (Grant, 2013). In the sections that follow, I set the context for history teaching in schools by recounting the national and state-level developments in the United States since the No Child Left Behind (NCLB) legislation and the Common Core State Standards surfaced. Part of that review focuses on the creation of the *C3 Framework*. The rest of the chapter highlights the scholarship on history teaching organized under each of the four dimensions of the Inquiry Arc. This chapter focuses on the teaching of history, which is the dominant topic within the broader field of social studies in the US. That said, many of the findings presented below are applicable across the diverse courses that make up the social studies.

The State of History Teaching: A Brief Review

The policy machinations around whether social studies in general or history in particular should be part of the U.S. conversation around school curriculum have largely come down on the side of literacy and mathematics. NCLB, signed into law by George W. Bush in 2002, targeted the elevation of all schools, but it did so by placing a premium on the teaching and testing of literacy and mathematics. Neither history nor social studies were mentioned. Eight years later, the Common Core State Standards were developed and adopted by nearly all states. These standards, too, featured literacy and mathematics.

Protests about the value of history notwithstanding (Ravitch, 2011), NCLB and the Common Core ELA (CC-ELA) standards largely sealed the classroom doors with social studies, science, and the arts on the outside. The full title of the English language arts standards—*Common Core State Standards for English Language Arts & Literacy in History/Social Studies, Science, and Technical Subjects*—offers a nod to history teaching and learning, but a nod is far from an embrace. History educators, burned by the post-NCLB context, were left wondering if their subject would simply wither away (Morton & Dalton, 2007; Wills & Sandholtz, 2009).

Although it is hard to imagine a school curriculum devoid of history, a downhill slide was clearly underway. Evidence of that slide has taken two forms. First, history, in the form of elementary social studies, is declining in relevance and instructional time. Although social studies (and science) never gained parity with literacy and mathematics in elementary classrooms (Fitchett & Heafner, 2010), NCLB and then the Common Core created a context in which time and attention to social studies dwindled (von Zastrow & Janc, 2004; Wills & Sandholtz, 2009): 62% percent of elementary schools increased their instructional time in

literacy and mathematics after NCLB (Center for Education Policy, 2009), while 36% of schools decreased their attention to social studies (Morton & Dalton, 2007). VanFossen and McGrew (2008) found that the classroom time devoted to elementary social studies continues to fall despite the introduction of new state standards for social studies. (For a contrary perspective on the state of social studies in elementary schools, see Holloway & Chiodo, 2009).

The decline of social studies can also be charted in the elimination of state-level tests. Although large-scale testing has never been popular with social studies educators, once such tests became part of the landscape it seemed a dismal sign when those assessments started disappearing (Grant, 2017). For example, in 2001 (before NCLB and CC-ELA), New York students took four required standardized tests in social studies (at grades 5, 8, 10, and 11). In 2010, the Board of Regents approved the elimination of half of those exams—the grades 5 and 8 tests (Arp, 2011; Gonen, 2010). Stretched financial costs were offered as the primary reason, but the curricular elevation of literacy and mathematics appears to have played a role as well (Arp, 2011).

One effort aimed at reversing the curricular slide in social studies is the *C3 Framework* (National Council for the Social Studies, 2013). Under the leadership of Kathy Swan (University of Kentucky) and Susan Griffin (National Council for the Social Studies), social studies supervisors from 21 states worked with the directors of 15 history/social studies professional organizations to craft a guidance document intended to help states develop new social studies standards. The *C3 Framework* planted a flag of sorts declaring that social studies—both disciplinary and interdisciplinary in nature and practice—had much to offer by adding a third C—civic life—to the Common Core target of college and career readiness. At present, that flag has been embraced in a range of states (including New York, Connecticut, Hawaii, Delaware, Illinois, and Arkansas) which have crafted new standards that reflect the Inquiry Arc.

The influence of the *C3 Framework* in general and the Inquiry Arc in particular took a curricular turn in 2014 when John King, then Commissioner of the New York State Education Department, allocated nearly $3 million dollars toward the development of curriculum units or inquiries ostensibly geared toward the *C3 Framework* (Grant, Swan, & Lee, 2015). The resulting New York State K-12 Social Studies Resource Toolkit (http://www.c3teachers.org/new-york-hub/) employs the Inquiry Design Model (IDM) to frame curriculum inquiries that directly reflect key elements of the Inquiry Arc—framing questions, evidence-based arguments, and taking informed action exercises (Swan, Lee, & Grant, 2015). That the Toolkit inquiries are open-sourced means that teachers across New York and the world have access to them. Whether social studies will be embraced as a coequal subject with literacy and mathematics and whether teachers will embrace the *C3* Inquiry Arc are questions that will unfold over the coming years.

History Teaching: Inquiry and Questions

Inquiry is a popular term in both the broad scholarly literature and that on teaching history. What inquiry means in practice, however, is as complex as the goals of a history education. Many scholars talk about inquiry; what they are talking

about can vary greatly. The authors of the *C3 Framework* attempted to operationalize inquiry into four components or dimensions that highlight questions, disciplinary concepts and tools, evaluating sources and using evidence, and communicating conclusions and taking action (National Council for the Social Studies, 2013).

Genuine history questions stem from curiosity about how the social world operates, for human behavior may be as noble, single-minded, and innovative as it is craven, guileless, and inane. How and why, when and where such behaviors manifest and the impact that they have define much of the historical record. For students and teachers to approach that record with curiosity and questions is a signature premise of inquiry-driven history education.

Inquiry and History Teaching

Although the transmission approach to teaching history has dominated classroom instruction, history educators have long promoted more ambitious practices (Brown, 1996; Pellegrino & Kilday, 2013). Those practices have manifested in different forms—e.g., Man: A Course of Study (Dow, 1991), the Amherst Project (Brown, 1996), Historical Scene Investigations (Swan, Hofer, & Lacascio, 2008), and Problem-Based Historical Inquiry (Brush & Saye, 2014)—but they share important commonalties and those commonalties push in the direction of inquiry-based teaching. Although it is not specific to history, a number of social studies educators advocate the use of Newmann, King, and Carmichael's (2007) *authentic intellectual work* (AIW) approach as another instance of inquiry-based pedagogy (see, for example, Stoddard, 2012; Swan & Hofer, 2013b).

Advocating for inquiry may have a long tradition in history education, but it has been more promise than reality (Brown, 1996; Pellegrino & Kilday, 2013; Woyshner, 2010). Inquiry-based approaches to teaching have gained greater purchase in other school subjects (notably science, for example, Windschitl, 1999) than in history. Interestingly enough, inquiry-based approaches have also been embraced more systematically in other countries (Hillis, 2005; Rogers, 1987) than in the US. For example, the national history curriculum in Australia takes inquiry as its starting point: "History is a disciplined process of inquiry into the past that develops students' curiosity and imagination" (Australian Curriculum, Assessment, and Reporting Authority, n.d.).

Although there are some differences in the way that inquiry-based instruction manifests, certain commonalties surface: a framing question; a range of disciplinary sources; independent, small-group and whole-class activity; authentic performance-based tasks (Ashby, Lee, & Shemilt, 2005; Bain, 2005; Saye & Brush, 2007; Swan et al., 2008; Terry & Panter, 2010; Wieseman & Cadwell, 2005). Inquiry-based units are also characterized by uncertainty as to the assessment outcome: Because they involve real-world questions and contexts that are ill-defined, they are characterized by a kind of intellectual messiness (Lesh, 2011; Wieseman & Cadwell, 2005).

One of the principal differences across inquiry-based units lies in the culminating activity. Every approach I reviewed features students constructing evidence-based arguments that respond to a central question. With some

approaches, the inquiry ends there (see, for example, Brown, 1996; Hillis, 2005; Swan et al., 2008). Pellegrino and Kilday (2013) observe that "inquiry is characterized in part as 'doing' history where students develop and respond to queries about people, events and phenomena of the past through a cyclical process that engages primary and secondary sources to formulate evidence-based interpretations" (p. 4).

In other inquiry-based approaches, however, students apply their inquiry-based learnings to a new context (Lesh, 2011; Swan et al., 2015). For example, after studying the removal of the Cherokee Indians in the 1830s, fifth graders in a Georgia classroom presented an argument to the state legislature on why a local historic site needed to be saved (Terry & Panter, 2010). Hammond (2010) terms this practice "civics-infused history education" (p. 59) and notes that it can emerge when teachers simply add a "so what?" question to their instructional units.

Scholars have attempted to understand why inquiry has been more talk than practice in history classrooms: Large-scale assessments favor convergent thinking and, consequently, convergent teaching; inquiry-based teaching takes more preparation time; practicing teachers have relatively little experience learning history in an inquiry fashion (Hammond, 2010; Pellegrino & Kilday, 2013). Saye and Brush (2007) add that teachers' conventional epistemological beliefs, their traditional pedagogical visions, and their conservative dispositions predispose them toward instructional approaches that are more pedantic than bold. McDiarmid and Vinten-Johansen (2000) observe that, even when explicitly exposed to an inquiry approach, preservice teachers may opt to employ transmission-style practices.

Challenges to inquiry-based history teaching notwithstanding, secondary students seem to respond positively (Blankenship, 2009; Ching Yang, 2009; Gradwell, 2006; Grant, 2003; Hillis, 2005; Lesh, 2011), as may their elementary-aged counterparts (Swan et al., 2008; Terry & Panter, 2010; Wieseman & Cadwell, 2005). Despite the disparaging reports of students' history knowledge (e.g., Ford, 2015), studies of more ambitious teachers' practices strongly demonstrate the positive response by students. As Smith and Niemi (2001) observe, "in history as well as elsewhere, active involvement promotes student achievement" (p. 34).

The scholarly literature, then, offers a bifocal view of inquiry-based teaching: convincing reports about why teachers resist such practices alongside equally convincing portraits of teachers and students engaged in the kind of work that defines inquiry. The biggest impediment to inquiry-based instruction ultimately may be teachers' inexperience with it. Until recently, there have been relatively few empirical studies that showed what inquiry could look like in real classrooms. This situation is changing, but it will be years before the teaching force is composed of those who have grown up around and learned history through inquiry.

Questions and History Teaching

Questions feature prominently in the *C3 Framework* and in inquiry-based approaches to teaching history. Although teachers typically ask many questions during an instructional unit, most focus on relatively low-level knowledge and

aim only at transmission (Bain, 2005; Lucey, Shifflet, & Weilbacher, 2004). Inquiry-based units typically begin with central questions (Bain, 2005; Brush & Saye, 2014; Caron, 2005) or "big idea" questions (Grant & Gradwell, 2010; Grant & VanSledright, 2014) that promote deeper content understandings and richer student engagement with ideas. As Bain (2005) notes, "students, like historians, can use historical problems to organize data and direct their inquiries and studies. Therefore, creating and using good questions is as crucial for the teachers as it is for the researcher" (p. 181). Such questions surface in all of the inquiry-based examples in the literature, whether in formal programs or in individual classrooms. The 1970s-era program *Man: A Course of Study* began with the question "what is human about human beings?" (Dow, 1970). More recent efforts such as the Problem-Based Historical Investigation (Saye & Brush, 2007) and the Historical Scene Investigation (Swan et al., 2008) projects feature questions such as "was the South justified in seceding from the Union?" and "did Truman decide to drop the bomb, or was the use of the atomic bomb inevitable?" respectively. Other scholars promote the use of central or big idea questions in book-length manuscripts (Monte-Sano, De La Paz, & Felton, 2014; Wineburg, Martin, & Monte-Sano, 2013).

Individual teachers also use central or big idea questions in their inquiry-based instruction. For example, Doyle (2010) used the question "does imperialism help or hurt native people?" to frame her global history unit. One of the teachers in Gerwin and Visone's (2006) study posed the question "should the Civil Rights movement have ended when it did?" as a means of investigating the impact of that key social effort. In the U.K. and U.S. classrooms where Ashby, Lee, and Shemilt (2005) worked, students pursued the question "did an Irish monk land in America 1,000 years before Columbus?" Each example above reflects Pellegrino and Kilday's (2013) observation that "learning by seeking information through questioning heightens student interest and allows for creative investigations and deep analysis" (p. 3).

Two qualities can be detected in these questions. First, each question connects to an important and enduring idea, event, or condition. Much has been written about the promotion of civil rights, use of the atomic bomb, and what it means to be human, yet interest in and debate around these topics persist as what they represent evolves. A central or big idea question, then, has to be built around content that matters. Writing about the Amherst Project, Brown (1996) describes the importance of "structuring units around universal and genuinely open-ended questions" (p. 272).

Brown (1996) also highlights the importance of relevance to students' lives, the second quality of a central or big idea question: "We were convinced that the pursuit into the past of questions that students could see reflections of in their own lives—and questions, moreover, to which there were no easy answers—would deepen students' understanding of themselves" (p. 272). The ideas, events, and conditions underlying big idea questions resonate with historians, but they also speak to issues about which students care. As students may feel caught between constructs like authority and freedom, may be curious about how adults justify their actions, and may be attracted to mysteries, there is much in history courses to interest them. The ideas and experiences that students bring to class

are often naïve and ill-formed. Teachers can use those ideas and experiences, however, to forge powerful connections to the content of history (see, for example, Brush & Saye, 2014; Caron, 2005; Grant & Gradwell, 2010; Lesh, 2011).

Yet, all questions are not the same. Caron (2005) asserts the idea that the questions teachers put in front of students need to meet the twin requirements of content *and* student relevance:

> Teachers' use of central questions offers students a more purposeful learning experience because daily instructional activities are directed toward some end-of-unit, performance-based scenario, which challenges students to apply historical information in an informed evaluation of the question. (p. 52)

Brush and Saye (2014) concur: Their Problem-Based Historical Investigation approach focuses on "engaging learners with rich historical content framed around inquiry into essential societal issues" (p. 13). The notion of a *compelling question* described in Dimension 1 of the *C3 Framework* echoes this perspective of questions that are "intriguing to students and intellectually honest" (National Council for the Social Studies, 2013, p. 17).

The scholarly literature on using questions as the entrée to inquiry-based teaching is far from saturation, and it is largely silent (with the exception of the Right Question Institute; see Rothstein & Santana, 2011) on the practice of students generating compelling questions. That said, the research on inquiry and questions is sufficiently well established as to demand attention and to counter the argument that it cannot be done.

History Teaching: Disciplinary Content and Skills

The literature on inquiry-based teaching in general and on compelling questions in particular is growing. Already large is the literature on teaching history content and skills. Often discussed as though they were separate (at times competing) entities, the distinction is largely artificial in practice: Skills—whether generic or discipline-specific, historical or pedagogical—are a means of learning content. For example, Metzger (2010) offers insights into the skill of understanding and determining historical significance but does so through an important piece of content: the Magna Carta. Nonetheless, the size of the literature on these two topics persuaded me to separate them for the purpose of analysis.

Dimension 2 of the *C3 Framework* argues that content and skills ought to be considered of equal importance. Many scholars echo this point, but the scholarly literature now privileges the latter: In the period 2000–2015, twice as many journal articles deal with historical thinking and teaching skills than focus on content. The trend toward historical thinking is even stronger among book authors—content-focused books are relatively rare (notable exceptions are the "teaching history as mystery" books, Gerwin & Zevin, 2011; Zevin & Gerwin, 2011). Content is important, but the elevation of historical thinking skills signals a shift in emphasis in the field.

History Content

The "breadth versus depth" question around teaching content has always proven a challenge that has only increased with the rise of the accountability movement (Grant, 2006; Pearcy & Duplass, 2011). Given that the content of history education could include everything people have ever thought, said, or done, it is no surprise to see that content topics in the literature run the gamut of human experience. Traditional content topics such as the Declaration of Independence (Pahl, 2005) and women's history (Kohlmeier, 2005; Schocker, 2014) are well represented across the literature. Also represented are less obvious topics such as Cleopatra (Zarnowski, 2007), cowboys (Gandy, 2008), and the Alamo (Marcus & Levine, 2010). Given the range of possible content topics, it is no surprise that the scholarly literature reflects considerable diversity.

Similarly, it is of little surprise that the literature features attention to the ways that teachers can organize the content they teach. Mouraz and Leite (2013) and Harris (2014) note that the search for curriculum coherence is far from over. Focused on contextualization, Mouraz and Leite (2013) describe how eighth-grade teachers in four Portuguese history classrooms used either traditional and cultural issues or local community issues to bring coherence and relevance to their students' studies. Endacott (2011) argues for using a single theme, such as the relationship between power and liberty, to organize a history course. Although they do not offer a particular content focus, Harris and Girard (2014) propose "instructional significance" as a construct through which teachers can view their content decisions. The three "considerations" are historical, student and community, and teaching.

Although the sheer scope of human activity has proven pedagogically troublesome, other issues surface as well. For example, Neumann (2010a) problematizes the idea of curricular coherence by working through three intellectual challenges—time, scale, and pattern—that, if not addressed, can undercut teachers' best efforts. Pearcy and Duplass (2011) cite the rise of high-stakes accountability as a further complication to teachers' attempts to create a curricular logic to their content decisions. Harris and Girard (2014) and van Hover (2006) point to the particular struggles that novice teachers face when trying to gain purchase on the unwieldy history curriculum. That scholars continue to advocate for the teaching of new content topics and new methods for teaching traditional topics suggests that the challenge of building strong, coherent curricular approaches will continue.

Historical Thinking Skills

Although content remains a focus in the history education literature, scholars have shifted much of their attention to the teaching of historical thinking skills (Pearcy & Duplass, 2011; VanSledright, 2002b). The transmission of factual material may still define many history classrooms, but teachers who want to integrate the teaching of skills will find many resources to help them (Lesh, 2011; Wineburg et al., 2013)

The surge of interest in historical thinking skills signals a vibrant field. With that vibrancy, however, comes the challenge of defining the construct. One piece of that challenge surfaces when scholars populate their conceptions of historical

thinking with different inventories of skills. Scholars use the phrase "historical thinking skills," but what they mean varies. The second part of the challenge arises from the fact that some of the skills cited are broad-based approaches to understanding history (e.g., causation, significance), while others focus more narrowly on working with historical sources. I take up the first issue—the differing conceptions of historical thinking—in this section. I reserve the discussion of source-based historical thinking skills (e.g., corroboration, contextualization) for a later section of this chapter.

Although there is a fair degree of commonalty across the different conceptions of historical thinking skills, the variation that surfaces is noteworthy. Many scholars include both broad-based and source-based historical thinking skills in their conceptions, but what they include follows no single pathway. The authors of the National Center for History in the Schools (National Center for History in the Schools [NCHS], 1996) standards offer perhaps the most inclusive approach to defining historical thinking. Each of the five standards they identify covers considerable territory: (a) chronological thinking, (b) historical comprehension, (c) historical analysis and interpretation, (d) historical research capabilities, and (e) historical issues-analysis and decision making). For example, the skills associated with but one of the NCHS standards—historical analysis and interpretation—are extensive:

- Compare and contrast differing sets of ideas
- Consider multiple perspectives
- Analyze cause-and-effect relationships
- Draw comparisons across eras and regions in order to define enduring issues
- Distinguish between unsupported expressions of opinion and informed hypotheses grounded in historical evidence
- Compare competing historical narratives
- Challenge arguments of historical inevitability
- Hold interpretations of history as tentative
- Evaluate major debates among historians
- Hypothesize the influence of the past

Most scholars focus on a subset of the nearly 40 individual skills described across the five NCHS standards. For example, van Drie and van Boxtel (2008) cite asking historical questions, use of sources, contextualization, argumentation, use of substantive concepts, and use of metaconcepts as the defining elements of historical thinking. By contrast, Seixas's (1996) list features significance, epistemology and evidence, continuity and change, progress and decline, empathy and moral judgment, and historical empathy.

Across these three lists of historical thinking skills, two issues emerge. One is that source-based thinking skills (e.g., compare competing historical narratives, evaluate major debates among historians) lie alongside more broad-based skills (e.g., analyze cause-and-effect relationships, hold interpretations of history as tentative). Source-based skills can be seen in van Drie and van Boxtel's (2008) listing of using sources and contextualization and in Seixas's (1996) inclusion of epistemology and evidence. Broad-based skills are apparent in van Drie and van Boxtel's addition of substantive concepts and metaconcepts and in Seixas's

citation of progress and decline and historical empathy. So, although different, the defining elements of historical thinking typically include both broad and source-based skills.

The other issue is that, despite the long and seemingly comprehensive NCHS list, scholars such as van Drie and van Boxtel (2008) and Seixas (1996) have expanded the notion of historical thinking skills. For example, van Drie and van Boxtel and Seixas include the constructs of metaconcepts and significance and empathy, respectively, neither of which are on the NCHS list.

Taken together, these two points suggest that the construct of historical thinking skills is still evolving. That said, the trend seems more to be in line with exploring individual skills rather than constructing a coherent and comprehensive list. For example, following Seixas's (1996) lead, a number of scholars are mining the notion of historical significance (Barton, 2005a; Grant, 2003; Metzger, 2010). Similarly, several scholars (Klein, 2010; Marcus & Stoddard, 2009; Monte-Sano & De La Paz, 2012) examine the notion of perspective taking. Other individual thinking skills that have caught the attention of academics include interpretation (Barton & Levstik, 2004; Fertig, 2005; Martell, 2013; Monte-Sano & De La Paz, 2012), empathy (Endacott, 2010; Grant, 2003; Kohlmeier, 2006; Yilmaz, 2007), and causation (Metzger, 2010; Shand, 2009; Stoel, van Drie, & van Boxtel, 2015; Waring, 2010).

Where once academics focused on identifying generic thinking skills, the last two decades have seen a turn toward subject-specific approaches to thinking (Grant, 2003; Shulman, 1987). Skills such as making and supporting arguments can be viewed as a universal process, but in the course of constructing an argument, history students must draw on a range of source-based skills particular to the discipline. History education scholars may never agree on a single list of historical thinking skills, but by continuing to explore the boundaries of the construct, they support more robust approaches to teaching history.

Practices for Teaching History

Whether history content and skills are taught together or separately, teachers can draw on a wide range of pedagogical practices. Those practices run the gamut from lecturing to small-group projects to oral presentations to documentary work. Some practices have more cachet than others; lecturing is generally discouraged by educational scholars while more student-active practices such as simulations are praised. Still, if one imagines teaching practices as a palette of possibilities then it may make more sense to decide which practice is best for the intended outcome rather than what the "right" practice is (Twyman & Tindal, 2005). For example, while student presentations may be useful for some instructional plans, a steady diet of them can be as mind numbing as nonstop lecturing (McDaniel, 2010). Here the *C3 Framework* is largely silent; the Inquiry Arc has instructional overtones (Grant, 2013) but takes no position on which instructional practices to use.

Despite the popularity of student-active pedagogy among reformers, a good portion of the scholarly literature features more student-passive approaches. Lecturing continues to be the symbol of traditional, pedantic instruction, yet it

has its adherents with McDaniel (2010) arguing that it offers a "valuable life skill" (p. 291). Stacy (2009) argues for the form but in modified fashion as in "interactive lectures." Stacy's suggestion supports the idea that lectures can serve a useful pedagogical purpose, especially if combined with other direct instruction approaches such as use of graphic organizers, graphic elements (e.g., maps, graphs, charts), and mnemonics.

The use of music and film gets more attention in the literature than the approaches mentioned above. Some of that attention likely comes from the upsurge of interest in exploring the many sources available to teachers beyond textbooks, but music and film may be seen as closer to the student-active side of the scale (Woelders, 2007). As with most tools, it is what one does with them that matters. So while music and film can be used for information-transmission purposes, they need not be. Pellegrino (2013) argues that music offers considerable advantage for minds-on, if not hands-on, instruction. In particular, Pellegrino notes that music can be used for a range of purposes: close reading, inquiry, student discovery and analysis, and creative development. Marcus, Metzger, Paxton, and Stoddard (2010) and Donnelly (2014) make similar arguments for film. In a particularly compelling study, Woelders (2007) cites a student who claims that the advantage of film is that "it makes you think more when you watch things" (p. 150).

Many educators see the use of technology as a leap toward student engagement. Student-created PowerPoint presentations, blogs, and wikis offer considerable opportunities for active learning. Scholars assert a wide range of benefits to using such technologies—for example, more student participation and engagement, possibilities for student authorship, opportunities for students to "do" history (Manfra & Lee, 2012; Martin, Maldonado, Schneider, & Smith, 2011; Stoddard, Hofer, & Buchanan, 2008). Yet, employing educational technology is no single solution to the ennui that many students experience in history class. First, as noted above, any instructional approach can be tiresome if it becomes repetitive (Cuban, 2001). Second, technology does not by itself teach. Manfra and Lee (2012) note that web-based activities typically need scaffolding activities to guide students' efforts. Finally, Stoddard, Hofer, and Buchanan (2008) argue that popular activities such as WebQuests may obscure rather than clarify key elements of the nature of history in general and the work of historians in particular.

Classroom discussion can straddle two levels of student activity. When approached as enhanced recitation (Hess, 2009; Larson, 2000), discussion veers toward the student-passive side of instruction. Intended to maximize student interaction and cast with an ambitious intellectual goal, however, discussion can be a useful route toward student-active goals (Blankenship, 2009; Okolo, Ferretti, & MacArthur, 2007; Reisman, 2015; Schuitema, Veugelers, Rijlaarsdam, & Ten Dam, 2009). Such goals can be maximized with online discussion boards. Though they can result in *pro forma* responses, the medium can allow for students, especially socially shy students, to engage in conversations with a wider peer group (Blankenship, 2009; Luckhardt, 2014). Classroom simulations also support student-active instruction. Though much less researched than discussion (DiCamillo & Gradwell, 2012), well-constructed simulations can offer powerful learning opportunities (Schweber, 2003; Wright-Maley, 2015).

At the student-active end of the continuum, teachers have enabled students to testify in front of state legislatures (Terry & Panter, 2010), reclaim lost cemeteries (Morris, 2008), and engage in service-learning projects (Ohn & Wade, 2009). Other approaches, such as documentary video making, offer direct connections between the ideas that students learn and the outcomes they produce (Manfra & Hammond, 2008; Swan & Hofer, 2013a).

Although I have organized this section around a continuum from student-passive to student-active teaching practices, this approach can obscure as much as it edifies. Students appear more active in some situations than in others, but activity need not mean mental engagement. In the end, there is no best or worse instructional practice. All teaching strategies have advantages *and* constraints; thoughtful teachers first consider their instructional goals and then choose vehicles to help students reach them.

History Teaching: Sources and Evidence

Had I written this chapter 30 years ago, it might have ended with the last section on history teaching practices. I could have added a short piece on the use of textbooks, but they were the only pervasive reading resource and their faults even then were well recognized (Wiley & Race, 1977). In those 30 years, however, interest in and scholarship around historical sources have grown dramatically. Similarly, although earlier scholarship did not avoid the area of student writing, attention to evidence-based arguments was scant. Today, making and supporting arguments is standard fare in many scholarly works. In recognition of these trends, Dimension 3 of the *C3 Framework* is devoted to evaluating sources and using evidence.

Historical Sources

In the section that follows, I focus first on the nature and range of sources described in the literature and then on the teaching of source-based historical thinking skills. I conclude the section with a brief discussion of the challenges that teachers face when teaching students how to read historical sources.

The nature and range of sources

Although advocacy for the use of multiple and alternative sources has a long history, it has really only become more common practice in U.S. classrooms of late (Barton, 2005b). A big part of the impetus for doing so has been the profound growth in access to historical sources through the Internet. A second contributing factor is the inclusion of sources on state-level tests, such as the Document-Based Questions on the New York Regents exams.

Even a cursory look at the scholarly literature demonstrates the range of historical sources available to history teachers and their students. The variety of text-based sources one might use to complicate a question, for example when the Declaration of Independence was signed (Pahl, 2005), only hints at the online resource possibilities. Alternative textual sources referenced in the literature include historical fiction (Crawford & Zygouris-Coe, 2008; Nokes, 2008a), poetry

(Scheurman, 2008), and biography (Fertig, 2008). Advocacy for text-based sources is complemented by a range of nontext historical sources. Static graphic sources include art (Suh, 2013) and cartoons and photographs (Schocker, 2014); video games (Morgan, 2013) and film (Donnelly, 2014; Knickerbocker, 2014; Metzger & Suh, 2008) constitute a category that might be termed animated graphic sources. The resource possibilities expand further through oral history (Jenks, 2010; Lark, 2007), artifacts and museums, (Marcus, Stoddard, & Woodward, 2011; Millward, 2007; Yilmaz, Filiz, & Yilmaz, 2013), buildings (Marcus & Levine, 2010; Marino, 2013), and music (Binkiewicz, 2006).

Scholars also point to the educative value of students creating their own sources. For example, Bickford (2010) argues for the usefulness of students constructing political cartoons, and Schmidt and Braga Garcia (2010) assert the value of having the children of families who live in Campina Grande do Sul, Brazil, write first-hand accounts of their experiences.

Source-based historical thinking skills

Although the distinction between "primary" and "secondary" sources is alive and well in the literature (Knickerbocker, 2014; Neumann, 2010b), I employ "historical sources" instead for two reasons. First, all sources are historical in some sense given that they are created for a purpose and in a context that must be understood before they can be used. Also, it is in the using that sources take on meaning: "There is no way to identify a source as primary or secondary without knowing how it is used as evidence" (Barton, 2005b, p. 750).

Whatever the nomenclature, sources are a popular topic in the history education literature with much of that literature focused on the use of sources to promote historical thinking skills. Although there is no consensus on a final list of such skills, the fact that there is so much scholarship in this area is a good sign. In the interest of economy, I decided to collapse the literature on source-based historical thinking skills into four categories that seem most prominent in the literature: sourcing, contextualization, corroboration, and perspective taking.

Sourcing refers to the idea that, when encountering a source, readers look to identify key elements of authorship (Wineburg, 1991a). Those elements include who the author is, what type of source it is, and when the source was created. Investigating sources in this fashion follows the advice of historian E. H. Carr (1961) to "study the historian before you study the facts" (p. 26). Students likely understand the importance of sourcing from their everyday experiences, but their encounters with textbooks may have dulled that disposition (Epstein, 2009; Paxton, 1999; VanSledright, 2011). Teachers who promote sourcing activities find that some students resist taking this step (Britt & Aglinskas, 2002; Nokes, Dole, & Hacker, 2007; Tally & Goldenberg, 2005).When approached systematically, however, teaching sourcing has proven successful with both elementary students (Ferretti, MacArthur, & Okolo, 2001; Fillpot, 2012; Rodriguez, Salinas, & Guberman, 2005; VanSledright, 2002b) and secondary students (Britt & Aglinskas, 2002; De La Paz, 2005; Nokes, 2008a; Nokes et al., 2007; Tally & Goldenberg, 2005). Although it may sound like a small step toward inquiry, the disposition to source documents "transforms the act of reading from passive reception to an engaged and passionate interrogation" (Wineburg et al., 2013).

Contextualization refers to the idea that sources are bound in time and space. Knowing something about the author is necessary, but not sufficient; sources also need to be understood within the broader confines in which they were created. Wineburg and his colleagues (2013) argue for the need to "*source* historical authors and … *contextualize* historical documents" (p. x; emphasis in original). As with sourcing, however, teachers may find that students struggle to appreciate and apply the skill of contextualization, as their tendency is toward "presentism"—seeing historical actors and events through contemporary value positions (Ashby et al., 2005; Huijgen & Holthuis, 2015; Lévesque, 2008; Levstik & Barton, 1997; VanSledright, 2002a). Students may struggle, but the evidence suggests that they can understand the concept of contextualization and apply it meaningfully.

The third of Wineburg's (1991a) triad of historical thinking skills, *corroboration*, speaks to the idea that a source is more richly understood when compared with others. Raised in a classroom culture of textbooks, students may find this skill as knotty as sourcing and contextualization. The easy availability of multiple sources on a topic notwithstanding, the challenge comes in encouraging students to see value in looking beyond the first source they encounter. However, multiple studies have demonstrated the capacity of students to engage this skill (Britt & Aglinskas, 2002; De La Paz, 2005; Ferretti et al., 2001; Monte-Sano & De La Paz, 2012; Nokes, 2008a; Tally & Goldenberg, 2005).

A final category of source-based historical thinking skills is *perspective taking.* Two dominant strains in the research focus on the rationales for emphasizing perspective taking. One reason is to expose students to voices that they may not encounter through standard classroom resources—for example, Native Americans (Warren, 2006) and the diversity of "cowboys" who once rode the American West (Gandy, 2008). A second reason offered for using sources is to illustrate varied perspectives on the same issue (Grant & Gradwell, 2005; Huijgen, van Boxtel, van de Grift, & Holthuis, 2014; Pahl, 2005; Reisman & Wineburg, 2008; Tally & Goldenberg, 2005).

Pedagogical challenges of using historical sources

Scholarly interest in promoting the use of sources is one thing; transforming teachers' practices is another. Although a number of reports demonstrate teachers' sophisticated use of sources (Grant & Gradwell, 2005; Monte-Sano, 2008), as many or more describe the challenges teachers and students face.

An immediate problem has been "death by sources" (Counsell, 1998)—the practice of overwhelming students with sources of all sorts. Because history textbooks have such a negative reputation, it is not surprising that teachers might embrace the opportunity to put a raft of journal entries, films, and political cartoons in front of their students. As with most things, more need not mean better (Woyshner, 2010). A second problem is that sources offer no pedagogical magic. Because most were not written with classroom applications in mind, sources can be as inaccessible as textbooks (Nokes, 2008b; Rodriguez et al., 2005; Twyman & Tindal, 2005) even to good readers (Wineburg, 1991b). A third issue is that teachers may struggle in using historical sources to drive instruction toward more ambitious ends (Barton, 2005b; DiCamillo, 2010; Lee, Doolittle, & Hicks, 2006; Metzger & Suh,

2008; Neumann, 2010b; Nokes, 2010)—though a factor as seemingly simple as access to and training for using technology can influence teachers' use of historical sources positively (Friedman, 2006; Tally & Goldenberg, 2005). Then there are the obvious challenges of how to help students make sense of historical sources in ways that enable them to think like historians (Lesh, 2011; Tally & Goldenberg, 2005; VanSledright, 2002b; Wineburg et al., 2013) and how to help teachers overcome an assumption that historical thinking skills are beyond most students' abilities (James, 2008; McDiarmid & Vinten-Johansen, 2000)

Evidence

The literature on writing evidence-based historical arguments is less voluminous than that on reading historical sources, but ultimately it may be more profoundly important in achieving the goals of inquiry-based history teaching. The efficiency of using multiple-choice tests may be one reason for the scarcity of student writing in history classrooms, but there are others including the sense among many teachers that most students are not capable of sophisticated writing (De La Paz & Felton, 2010; Tally & Goldenberg, 2005). Scholars generally believe that having students do any kind of writing creates instructional benefits (Graham, 2006). Generic writing instruction has its place, but since Shulman (1987) began asserting the importance of discipline-specific thinking, history education scholars have promoted the development of history-centered, evidence-based arguments. To that end, scholars examine how students think about historical sources as evidence and how they make and support arguments.

Although there is far more work to be done, two themes are emerging. One is that evidence-based argument writing needs to be explicitly taught and practiced; the other is that students benefit immediately. Students may have a lived-experience sense of the need to provide reasons for their ideas, but they do not apply that sense regularly or robustly to their school-based tasks (De La Paz & Felton, 2010; De La Paz, 2005; Lesh, 2011; VanSledright, 2002b). Students will struggle, sometimes mightily, to craft persuasive and well-supported arguments: They may misunderstand sources, or use evidence indiscriminately and uncritically, or misunderstand the rhetorical structure of an argument (Brett & Thomas, 2014; De La Paz & Felton, 2010).

Explicit instructional approaches—such as the Cognitive Apprenticeship Model (De La Paz & Felton, 2010; Monte-Sano et al., 2014), Constructive Controversies (Huijgen & Holthuis, 2015), and SCIM-C (Summarize, Contextualize, Infer, Monitor, and Corroborate) (Hicks, Doolittle, & Ewing, 2004)—offer important insights into how teachers can help support their students' fledgling experiences in making evidence-based arguments. Support for that claim, while still emerging, shows that students can write pieces that are more persuasive, display increased historical accuracy, and represent more sophisticated claims and counter-claims than initially expected (De La Paz & Felton, 2010; De La Paz, 2005; Ferretti et al., 2001; Monte-Sano, 2008). Particularly salient is the finding that students of varying academic ability (De La Paz & Felton, 2010; Ferretti et al., 2001) and age level (Ferretti et al., 2001; VanSledright, 2002b) can construct well-supported arguments.

History teachers rightly wondered about the fate of their subject matter when NCLB ignored it and the Common Core treated it largely as a footnote. The latter policy, with its emphasis on reading and writing in more ambitious ways, does support robust, inquiry-based history teaching, so teachers can choose to see the Common Core as a win for their field. That said, there are discipline-specific differences in how students read and write with historical sources. The scholarly literature is more robust on the first, but the latter ultimately may prove more transformative.

History Teaching: Communicating Conclusions and Taking Action

If inquiry-based teaching begins with questions, then it seems reasonable to offer students opportunities to answer them. Content-based assessments (e.g., multiple-choice tests) can help teachers know what their students know about the topic at hand, but such approaches have greater utility when coupled with argument-based tasks.

If assessment is the third leg of a curriculum and instruction triad, it is the least well studied (Grant, 2017). A fair-sized literature exists around large-scale testing (Au, 2007; Grant & Salinas, 2008; Reich, 2013; Wills, 2007), but classroom-based and formative assessment are rarely the focus of empirical studies (Grant, 2017). Torrez and Claunch-Lebsack (2013) assert that "the extant literature is replete with studies on assessment, testing, and evaluation, yet there is a paucity of empirical research focusing specifically on assessment in the social studies classroom" (p. 462).

Just as there are a range of approaches to teaching history, so, too, are there a range of approaches through which students can communicate their responses to a compelling question. Dimension 4 of the *C3 Framework* embraces this idea, arguing in effect that teachers ought to employ a wide range of assessments and give students opportunities to extend their learning into a contemporary context through taking informed action exercises. The scholarly literature on taking action is more robust in civics education (see, for example, Hess & McAvoy, 2014; Schuitema et al., 2009), but that component of the history education literature shows potential.

Communicating Conclusions

The swelling literature base on making and supporting historical arguments is encouraging, particularly given the emerging research indicating that students of all abilities can engage in such work. Clearly more work is in order here, and Torrez and Claunch-Lebsack's (2013, 2014) concern about the deficit in empirical studies of classroom-based assessments signals an area ripe for research. As an assessment, evidence-based argument making hits all the right marks—content knowledge *and* application, reading *and* writing with sources, general inquiry *and* discipline-specific thinking skills. A case could be made for constructing arguments as the all-purpose assessment in history classrooms.

Convincing all teachers (to say nothing of all parents and policymakers) of this claim may prove challenging, as some may assume that only the best students are capable. The work that scholars like Susan De La Paz and her colleagues (De La Paz & Graham, 2002; De La Paz & Felton, 2010; De La Paz, 2005; Monte-Sano et al., 2014) are doing should prove persuasive, but only when it is replicated and the results become widely known.

Although having students make evidence-based arguments through five-paragraph essays may be viewed by some as the gold standard, there are any number of alternatives. Students can express and support their arguments in writing through perspective-taking exercises, outlines, and blogs. They can craft arguments orally through debates, structured discussions, and oral presentations. And they can construct arguments visually through drawings, political cartoons, and posters (Swan et al., 2015). Each of these approaches has advantages and disadvantages, but with this array of assessment opportunities teachers should be able to avoid subverting students' interest through repetitive tasks.

The advantages of concluding an inquiry-based unit with an argument-based exercise are several, but teachers assess for more than the ability to make and support arguments. Whether it is testing for content knowledge, assessing source-based thinking skills, understanding expressions of empathy, or gauging oral presentation skills, teachers have many classroom-based assessment needs that have not been well researched (Torrez & Claunch-Lebsack, 2013).

This is not to say that there is no literature on the assessments teachers use. In addition to the citations listed above, De La Paz (2013) describes the value of discussion and simulations; Claunch (2002) illustrates the utility of drawing; Doyle (2010) portrays the usefulness of role-playing; and Swan and Hofer (2013a) depict the possibilities of documentary video making. In each case, however, the emphasis is typically focused on the instructional activity behind the assessment rather than on the assessment itself.

A case in point is the literature around debate. Most authors feature debates as a classroom activity instead of an evaluation of what students know and can do. For example, MacArthur, Ferretti, and Okolo (2002) used a content test as the measure of students' knowledge gain rather than the debates in which they participated. Similarly, Hernández-Ramos and De La Paz (2009) engaged students in debates, but assessed the project through interviews. DiCamillo (2010) shows how debate can be used as an assessment; unfortunately the teacher she profiled employed practices that undercut the debate's value. Readers will find more productive descriptions of debate as assessment in Endacott and Pelekanos (2015).

Offering students opportunities to construct evidence-based arguments sends the right signals about the importance of inquiry-based approaches to teaching: If the questions are worth asking, they are worth answering in depth. Evidence-based arguments are not the only way students can communicate their conclusions, but they provide a robust approach to doing so. That there needs to be more research on this topic is clear, but that finding exposes the even bigger need for more empirical studies of classroom assessment in general.

Taking Informed Action

In spite of its inclusion in the NCHS standards (developed 1992–1996), the idea of students taking informed action has found rocky ground in the social studies literature. Concerns about the short instructional day and about introducing presentist thinking notwithstanding (Lee & Shemilt, 2007; Schuitema et al., 2009), the available citations point to the possibilities that students will see relevance in their history studies. The NCHS standards call for students to be able to "formulate a position or course of action on an issue by identifying the nature of the problem, analyzing the underlying factors contributing to the problem, and choosing a plausible solution from a choice of carefully evaluated options" (NCHS, 1996). This call is reaffirmed in Dimension 4 of the *C3 Framework*:

> In social studies, students use disciplinary knowledge, skills, and perspectives to inquire about problems involved in public issues; deliberate with other people about how to define and address issues; take constructive, independent, and collaborative action; reflect on their actions; and create and sustain groups. (National Council for the Social Studies, 2013, p. 62)

In the *C3 Framework* taking action is one of three elements. Equally important are the preceding components of *understanding* the issues at hand and *assessing* the potential for civic actions (Swan et al., 2015). Bussing students to the state capitol after exploring a topic and weighing possible responses, for instance, is one way that taking informed action can play out, but there are others.

Hammond (2010) argues that civic action can emerge simply through asking the "so what?" question: "Teachers' practice of requiring students to construct their own determination of the significance of historical information provides an opening for civics-infused history education" (p. 55). Staying in the classroom setting, Schuitema and colleagues (2009) assert that students engage in "dialogic citizenship education" when they learn how to share their ideas and arguments with one another. Moving outside of the classroom to the school level, Morris (2008) describes a teacher and students who, after visiting with local artisans, taught the crafts they learned to younger students in their school. After studying women's history, Jessica Staudt's fourth-grade students concluded that women are poorly represented, especially at the local level. To extend their lessons, they wrote to local women leaders, recorded public service announcements, and created digital books (Montgomery, Christie, & Staudt, 2014).

Other taking informed action projects can occur in the local community. Mitchell and Elwood (2012) describe an effort in which students used an interactive web program to develop a community map, while Green (2013) portrays the creation of a Black youth program on community radio. Wieseman and Cadwell (2005) report on a project in which fourth graders explored the role of migration and interdependence in their community, while Conard (2010) notes the value of efforts like National History Day as a public venue for students to display their efforts.

Clearly, there are challenges to adding taking informed action activities to an already overcrowded school day. Teachers will have to carefully weigh the benefits and challenges of doing so. Though scant, evidence suggests that it is well worth the effort and that building informed action activities into instructional

plans rather than treating them like an add-on may help (Swan et al., 2015). As the area least well-represented in the literature, Dimension 4 of the *C3 Framework* offers fruitful scholarly ground. As teachers begin to navigate the Inquiry Arc in general and through projects like the Inquiry Design Model featured in the New York K-12 Social Studies Toolkit (Grant et al., 2015), the possibilities grow for adding rich studies of teachers helping their students communicate their conclusions and take informed action (Francis, 2015).

Conclusion

If inquiry is to become the basis of teachers' classroom practice then it seems reasonable to assess the degree to which the literature base could support it. Until recently, however, the bigger issue was whether history would remain as a core school subject. NCLB and the Common Core may have wounded history, but it has survived. Although its status can never be assumed, a case can be made for history education being on the rebound. If inquiry-based teaching practices flourish, history educators may look back on the recent troubles as an artifact of the politics of the times.

There continue to be challenges to the goal of historical inquiry. Scholars need to extend the literature base in key areas such as classroom-based assessment, making and supporting arguments, and taking informed action. More broadly, all history educators will need to advocate for the importance of history education in general and for a stronger presence in elementary schools in particular. These challenges, however, ought not to obscure the very good work being done. As I hope this review establishes, there is a robust and growing literature supporting inquiry-based teaching in general and the specific contributions to widening the school curriculum, understanding how students read sources, and helping students learn to work with evidence. History educators are used to being left out in the curriculum woods. The coming decade looks bright for history teaching and the possibilities for seeing both the forest and the trees.

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17

Assessment of Learning in History Education: Past, Present, and Possible Futures

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In the mid-twentieth century most school history courses on both sides of the Atlantic sought to transmit factual knowledge of national and regional pasts (Wilschut, 2012). Typically expressed in percentage or grade form, assessment outcomes were used for selection purposes by employers and universities. Assessments were rarely deemed problematic. Critics might query the objectivity and reliability of judgment-based grades but rarely questioned the value of assessing recall of events, names, dates, and received judgments about the historical significance of individuals and inventions, wars and revolutions. Selected-response (or "objective") tests, although criticized on both sides of the Atlantic for "dumbing-down" teaching and rewarding guesswork (Black, 1998), were generally thought to have improved the reliability of end-of-course assessments.

In recent years the relevance and utility of these longstanding approaches to assessment in history education have been questioned. Traditional methods and approaches, it is argued, have led us to value "what is measured rather than … engaging in measurement of what we value" (Biata, 2009, p.43) to an extent that many teachers feel pressured to "teach to the test" with scant reference to the aims and purposes of the subject (Wineburg, 2006). Such criticisms have been driven less by newly discovered flaws in established assessment methods and procedures than by failure to keep pace with a steady expansion in the *uses* made of examination data and with new ideas about the *aims* of history education.

Decisions about *how* we assess—about choice of items and instruments, marking and scaling systems—should take account of the *uses* for which assessment data are required (e.g., to inform decisions about the employment options of students or to evaluate the quality of educational programs) as well as of *what* is assessed (e.g., recall or application of information). The failure of assessment methodologies to keep pace with recent developments in history education is easy to demonstrate (Lee & Shemilt, 2003) but difficult to remediate. Methods suitable for some purposes (e.g., analysis of learning outcomes) may yield data

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inadequate for others (e.g., textbook evaluation). The desirability of assessing nontraditional learning outcomes and obtaining data fit for a wide range of purposes must also be weighed against requirements for cost and quality controls. If no single assessment package can fulfill every combination of needs, possibilities must be clarified and priorities agreed.

In sum, the utility of any assessment system is contingent upon interactions among four factors: the purposes served by assessment data; the learning constructs assessed; the methods employed to obtain and scale data; levels of confidence demanded and resources allocated. In what follows, these four factors will be discussed, their interactions illustrated, and implications for the utility and integrity of assessments evaluated.

Assessment Purposes

Information about student learning outcomes may be sought for a variety of purposes: to inform student selection and progression; to assure and/or improve the quality of educational provision; and to enhance understanding of how students make or fail to make sense of what they are taught. Such purposes may be itemized under three headings: summative, formative, and diagnostic.

Summative purposes require information about the learning outcomes of individual students at the end of a course of study. Outcomes are usually scaled and graded but rarely described. Together with assessments in other subjects, history grades testify to the abilities and aptitudes of students wishing to continue education or train for employment. Data specific to the learning outcomes of student *groups*—defined by institutional or geographical location, sex, or socioeconomic status—are increasingly used to monitor shifts in the quality of educational outcomes and inform executive actions regarding school governance or funding, teacher training, or performance-related pay.

Formative purposes are fulfilled when evidence about learning in progress is used to inform the objectives, methods, and pace of ongoing teaching. Although implicit in the setting and marking of class and homework tasks since the emergence of national education systems, formative purposes attracted considerable attention in the final decade of the twentieth century and—in the opinion of some writers (Gipps, 1994; Black, 1998)—represent a paradigm shift from "external testing" toward "classroom-based assessment." Assessment data used for formative purposes can enable the progress of whole-class groups to be monitored and new learning reinforced prior to further demands being made. Unfortunately, evidence of the prophesied paradigm shift has yet to be found in the majority of classrooms.

Diagnostic purposes demand analysis rather than measurement of learning. Whereas summative assessments scale and grade learning outcomes, and formative assessments register the extent to which instructional objectives are met, diagnostic assessments illuminate both routes and impediments to learning. Some diagnoses focus on individual needs. More often, information about misconceptions and impediments to understanding common to student groups or populations is sought. For instance, when students are asked to identify the

causes of World War I, diagnostic assessments might indicate that those who list an excessive numbers of putative "causes" *either* think that doing so produces "a more complete answer" *or* assume that a "big event like WWI" must have been caused by an equivalent mass of "smaller causes" (Shemilt, 1980). In the former case, students respond to the perceived demands of the task without attempting to make sense of the constituent history. They attempt to play the classroom game without considering—and perhaps without caring—whether the game has meaning or value. In the second case, even though assumptions about the conservation of causal mass are utterly misguided, students genuinely engage with the question of why things happen in human affairs.

Learning Constructs

An indefeasible aim of history teaching remains the transmission of information about selected aspects and segments of the "received" past. The teaching and assessment of historical knowledge, however, has been challenged on the grounds that the value of history education is questionable unless students understand and are able to apply what they know (Lee, 1991). Such concerns have inspired efforts to define the conceptual apparatus necessary for students to understand, evaluate, and apply information about the past. For the purposes of this chapter, it is convenient to group the most persuasive learning constructs to have emerged from research studies in North America and Europe under the portmanteau labels *historical knowledge* (HK), *historical thinking* (HT), and *historical consciousness* (HC).

Historical knowledge embraces overlapping sets and subsets of learning outcomes. The most primitive distinction is that between the *recognition* and *recall* of declarative knowledge. Recognition can be tested by means of selected-response items, but its recall cannot. More sophisticated distinctions include those between list-form recall of disaggregated historical terms, facts, and propositions and their articulation into complex accounts or arguments. Assessment of the latter necessitates use of constructed-response items.

More challenging historical knowledge constructs pertain to the learning of "joined-up," "big," or—after Braudel—*longue durée* history (Burke, Christian, & Dunn, 2012; Christian, 2004; Guldi & Armitage, 2014). Distinctions of scale are irrelevant if we require no more than recall of list-form statements but highly significant should we seek to test students' ability to construct, evaluate, or switch between "cross-generational" and "human-scale" accounts of and judgments about the past.

Historical thinking involves understanding differences between pasts lived and experienced by predecessors and pasts reconstructed and explained by historians. These "pasts" necessarily have points of contact, but many statements contained in historical accounts would be neither understood nor recognized by people to whose lives they refer. In part this is because historians have access to information inaccessible to people whose present it was; in part because shifts in material and symbolic cultures dispose us to think and feel differently than our predecessors; but it is mainly because many of the questions historians ask would

have been irrelevant or meaningless to people living at the time. Such differences can be hard to grasp. Common sense leads many students to deem accounts of the past to be as true or false as news bulletins about the present. Historians may be thought to offer disparate accounts of the same past because, like contemporary journalists and newscasters, they "spin" facts and offer personal "interpretations" of what and why things happened.

Historical thinking differs from thinking about the here-and-now much as scientific models of unseen fields and particles differ from commonsense accounts of shared sense perceptions. At bottom, historical thinking seeks to distinguish between less contestable, more contestable, and invalid propositions about the past with reference to sources of evidence that can never be taken at face value. Indeed, whether a source can serve as evidence of something depends upon the questions we wish to answer or hypotheses we wish to test.

Historical thinking also entails asking "what," "how," and "why" questions in new ways. In the here-and-now, for instance, we may demand explanations for unforeseen events (such as a terrorist attack in central Paris) or unintended outcomes (such as the failure of Western intervention in Afghanistan) with a view to understanding what went wrong and who was to blame, but when attempting to make sense of the past we also seek to identify and explain turning points and long-timescale developments invisible to the individuals—and even generations—who lived through them. Thinking in these and other ways demands that students learn more than received facts about the past. According to Carlos Kölbl and Lisa Konrad (2015), students must also master a variety of "methodological" and "orientation" competences and learn "to ask historical questions" (p. 25). It follows that the current focus on historical thinking in schools demands new modes of and instruments for assessment as well as new approaches to teaching and learning (Seixas, Gibson, & Ercikan, 2015).

Historical consciousness determines the ways in which historical knowledge and thinking influence our everyday beliefs, attitudes, and decisions. Knowledge of the past can reinforce national, social, and religious identities; sharpen distinctions between "us" and the "other"; validate support for or opposition to the *status quo*; and inspire confidence in the inevitability of social and technological progress or dread of ecological and economic collapse. In liberal democracies, research suggests the impact of history education on students' beliefs and attitudes to be slight but generally positive (Angvik & von Borries, 1997). Exceptions to this generalization, however, may be found in divided and conflicted communities (Makriyianni, 2011).

Perhaps more important is that, for some students, the past is not thought to be "dead and gone" but as contributing to analyses of the present and identification of possible futures. The complexities of historical consciousness for everything from "experience of time" to "moral reasoning" have been analyzed in depth (Rüsen, 2004). Implications for what and how students should be taught have been drawn (Laville, 2004), but scant progress has as yet been made in determining the structure of this elusive construct. What is certain, however, is that—in common with historical thinking—historical consciousness is predicated upon possession of more sophisticated forms of historical knowledge than

the low-level factual recall typically targeted by multiple-choice and other selected-response tests. Indeed, it may not be possible to make secure assessments of students' historical consciousness unless and until we can validly assess, and thereby control for, more complex aspects of historical knowledge and historical thinking.

Assessment Design

The need to accommodate nontraditional learning constructs and a widening range of assessment purposes has inspired experimentation with mass-administration time-limited tests and, more radically, with deadline-limited coursework and individualized projects. In some Western countries, the design and marking of history coursework has remained in the hands of individual teachers, schools, or local teacher consortia. More often, however, to ensure comparability of demand and reward across student populations, external examination boards moderate both the design and the marking of coursework tasks and projects. The pros and cons of course and project work include:

- Coursework completed within learning contexts is a more authentic and ecologically valid mode of assessment than the timed test. Some students react negatively to the discipline and artificiality of examination rooms. Most important of all, complex learning is more effectively assessed by "power" than by "speed" tests (Kubiszyn & Borich, 1984). The downside of assessments undertaken in uncontrolled environments is degradation of data authenticity. Even when coursework and projects are entirely students' own work, the material and social environments within which they operate can influence product quality. In Britain the learning outcomes of students following the experimental Schools Council Project "History 13–16" were assessed by means of coursework and two modes of written examination. Controlling for variations in IQ, coursework scores correlated more highly with sex and socioeconomic status than did either set of examination scores (Shemilt, 1979).
- Assessment of historical knowledge, thinking, and consciousness requires access to larger bodies of data than can be generated by traditional methods without subjecting students to an unreasonable number of tests. In contrast, course and project work integrated with and contributory to teaching programs can be set, marked, and moderated over much longer spans of time. The price paid for this integration is that, when used for summative purposes, coursework-based assessments are likely to underestimate end-of-course learning outcomes.

Project and coursework-based approaches are useful when task comparability and score reliability have low priority—as when assessment data are used for formative purposes—but unsatisfactory when high-stakes decisions about individual students are at issue. It is not surprising, therefore, that priority is usually given to the design and marking of *selected-response items* (SRI) and *constructed-response items* (CRI) and instruments.

Selected-Response Items

SRIs come in sundry formats including *true/false (T/F)*, *completion*, *matching*, and *multiple choice (MC)*. All require students to identify which of two or more words, statements, or links is the "correct" answer to a given question. Since the range of test-responses is limited and judgments about correctness are pre-empted, marking is less fallibly undertaken by machines than by humans. Online administration of SRI tests also enables continuous variation in the difficulty of items presented, thereby enhancing test-score precision, minimizing assessment error, and maximizing data obtained from zones of uncertainty between knowledge and ignorance.

Elimination of error from SRIs is, to some extent, achieved by displacing it from item-marking to item-design. The most obvious source of error arises from tacit invitations to guess whenever knowledge is lacking. Systematic guesswork would, on average, yield scores ranging from 50% on T/F items to 25% on 4-option MC items. It is possible to predict and hence eliminate much guess-related error from population profiles constructed for large student cohorts. This is not, however, possible for individual scores. By chance, some students are luckier than others. Less obvious, but potentially more serious, is the possibility that smart and test-wise students improve on guesswork by using incidental cues in item stems and "distractors" to identify "key" (i.e., correct) statements. Items may also cue, or even contain, answers to other items. Indeed, the more connected and interdependent are actions and events within a knowledge domain, the harder it is to ensure the factual independence of stems, keys, and distractors across a large numbers of items. Such problems notwithstanding, when well-designed and systematically trialed, selected-response instruments—and multiple-choice tests in particular—are the instruments of choice for high-stakes summative assessments of declarative knowledge. Well-constructed MC tests can be content valid, hard for students to second guess, and yield coefficients of composite reliability of 0.90 or above.

Use of SRIs to assess complex historical knowledge is more difficult. Each selected-response is a binary unit of measurement (scored "0" or "1"). It follows that a scale, running from 0 to 100 or whatever, assumes all knowledge "bits" to have equal value. Equal value does not, however, entail equal difficulty. The difficulty, or *facility*, of each test item is equivalent to the proportion of the target population (or random samples thereof) able to answer it correctly. Test results are assumed to be content-valid when two conditions are met: knowledge assessed by items is representative of that contained in a domain specification, and item *facility indices* are evenly distributed from low to high within a specified range (e.g., 0.20–0.80). Calculation of correlations between individual item and total test scores (*discrimination indices*) enables test designers to ensure that the facility gradients of assessment instruments are monotonic (i.e., mark scale intervals are well-ordered though not necessarily equal). In the best of all possible worlds, from knowledge of any student's aggregate score it would be possible to identify which items were correctly and which were incorrectly answered. In the real world, scaling procedures are less than immaculate and *discrimination indices* rarely reach unity. In part this is because assumptions about item *facilities* are simplistic. The

proportion of a student population answering an item correctly (*phenomenal facility*) cannot be equated with the intrinsic difficulty (*stimulus facility*) of the knowledge tested.

Differences in *stimulus facility* typically relate to the abstraction and complexity of the knowledge at issue. We would expect, for example, students to identify the date of the Albany Congress (1754) more easily than distinguish between true and false statements about its outcomes. We cannot, however, assume measures of item success rates (phenomenal facility) to correlate perfectly with measures of the intrinsic difficulty (stimulus facility) of the knowledge tested. An item using closely spaced distractors (1753, 1755, and 1756) is likely to prove harder (i.e., have lower phenomenal facility) than an item using more widely spaced distractors (1744, 1764, and 1774) even though their stimulus facilities are necessarily identical. In sum, measures of declarative knowledge yielded by multiple-choice tests rest on two questionable assumptions: that item *facility indices* ordered from high to low accurately register the intrinsic difficulty of knowledge tested; and, in consequence, that inferences about the quality as well as quantity of students' knowledge can be drawn from their test scores.

When the historical knowledge at issue is too complex to disaggregate into free-standing "bits" of information, the use of SRI-based tests is likely to yield data with unacceptably low levels of construct validity. Even more problematic are SRI-based assessments of historical thinking and historical consciousness. Analysis of students' decision-procedures (Reich, 2015) suggests that valid inferences about historical thinking cannot consistently be drawn from responses to multiple-choice items. Complex statements, subtle arguments, and primary sources may be variously construed by students without indicating why correct (key) or incorrect (distractor) responses have been made and, in consequence, without yielding information about what has and has not been learned. Students might, for instance, interpret a primary-source reference to Cardinal Wolsey "flaunting his scarlet" as a reference to indecent exposure, but this misinterpretation is unlikely to have been included in a distractor. Nor can responses to SRIs intended to test students' mastery of evidential logic—a component of many historical thinking specifications (Seixas, Gibson, & Ercikan, 2015)—always be taken at face value. As part of a formative assessment in one U.K. school, 15-year-old students were presented with the following SRI item intended to test understanding of the relationship between the concepts of *evidence* and *information*:[1]

A local historian has claimed that, in 1797, cholera was the major cause of death in the town of Colne. To test whether this statement is TRUE or FALSE, which **TWO** of the following pieces of information about Colne in 1797 would you need:

a) The number of people who lived in the town **YES/NO**
b) The number of deaths from all causes **YES/NO**
c) The number of deaths from cholera **YES/NO**
d) The number of people who caught cholera but recovered **YES/NO**
e) The cause of every death not from cholera **YES/NO**

It was anticipated that most students would select either (c&e) or, less obvious but yielding the same information, (b&e). In fact, the most common response was (b&c) followed by (c&e) and (c&d). During post-test interviews students were asked to explain and justify their responses. These revealed that (c&e) respondents correctly construed the statement "cholera was the major cause of death" as "more people died from cholera than from any other single cause." Respondents electing for (b&c), however, understood the stem statement to mean "most deaths were caused by cholera." The logic of the (b&c) selection was therefore as sound as that of respondents electing for (c&e) or (b&e). Likewise, the evidential logic of students who selected statements (c&d) because "major cause" was taken to mean "most potent" or "most dangerous" malady was sounder than their understanding of causation. It is reasonable to argue that English-language comprehension was assessed to a greater extent than historical thinking. If so, but for one-to-one interviews, the construct invalidity of the item would have remained indistinguishable from the lower-than-expected attainment of students.

Similar difficulties in exegesis were encountered by Wilschut (2012) in the use of selected-response sequencing items to investigate historical consciousness of time and chronology in samples of 14- to 15-year-olds. Students were required to "put into the correct time sequence … five drawings, including a Medieval cargo ship, a Greek trireme, a steam paddle boat, a steam mail boat, and a Viking ship" (p.122). The overall success rate was 55% and, by comparing student performance on this and other sequencing items, Wilschut concluded that students augmented factual knowledge with assumptions about "deficit pasts" and "progress through time." The ubiquity of such assumptions has been noted by other researchers (Lee, 2005). Limitations of this and similar selected-response tasks are twofold. First, although the fraction of correctly sequenced steps can be calculated, we cannot identify the relative contributions of declarative historical knowledge and historical consciousness. Knowledge can (usually) be inferred from positive outcomes, but HC may account for erroneous as well as correct sequencing. A ship "more developed and complicated [in appearance] was obviously seen as more modern, and therefore the simpler Viking ship was noted as being older than the Greek trireme" (Wilschut, 2012, p. 123). Second, it is dangerous to scale HC in this way. Students' assumptions about "progress through time" may or may not pertain to one or more dimensions of the (as yet) imperfectly defined HC construct.

Attempts have been made to develop SRIs appropriate for the assessment of historical thinking. One proposal is "the weighted multiple-choice item" (VanSledright, 2015, p. 83), an example of which, together with suggested weightings in parenthesis, is reproduced below:

Even though we know they all died, it is difficult to figure out how that happened to Custer and his troops at the battle of the Little Bighorn because

a) The surviving Indians did not speak English well enough to provide testimony. (0)
b) Colonel Custer and his troops were killed, preventing them from recounting the battle. (1)

c) Benteen and Reno heard the battle but could not see it due to the rolling landscape. (2)
d) Reconstructing the battlefield was hampered by the disappearance of evidence. (4)

The item focuses on the limitations of witness testimony. Proposed weightings suggest that eye-witness accounts rarely yield evidence of more than the fog of war and, in consequence, are less valuable sources of evidence than, for instance, material remains from the aftermath of battle. It is possible to query VanSledright's weighting scale and failure to acknowledge that selection of the zero-weighted option, although factually false, might indicate recognition that eye-witness accounts from the Sioux could have been comparable in value to those from Custer's troops had they survived. However, such cavils are trivial in the light of VanSledright's admission that the validity of item weightings can only be ascertained through "verbal report protocols or a classroom discussion" (p. 85). Indeed, we might expect verbal report protocols to reveal that reasons for selecting (and rejecting) weighted statements vary in kind and quality of historical thinking—that is, that fixed weightings are not justifiable when assessing learning outcomes more complex than declarative factual recall.

Constructed-Response Items

CRIs have a pedigree that began by asking candidates to offer one- or two-word answers to specific questions or, in essay form, to write all they knew about blocks of taught content. In most countries CRIs testing declarative knowledge have been supplanted by paragraph- or essay-length items demanding knowledge application as well as recall and, to an increasing extent, by items seeking to activate historical thinking or consciousness. To this end, CRIs may be written around stimulus materials and invite comment upon historical paradoxes or dilemmas, unexpected turns of event, or strange practices.

For example, a test item in a British 16+ examination presented a 10th-century woodcut of Hippocrates examining a patient's urine and asked candidates to explain why Hippocrates is shown wearing Arab clothes. The stimulus was intended to activate recalled knowledge—that Hippocrates was a fifth-century BC Greek physician—inconsistent with the woodcut image. The CRI was intended to yield evidence pertinent to the *change and development* dimension of HT by challenging students to locate people and practices in developments across time and space. Two responses are reproduced below (spelling corrected):[2]

Response 1: Hippocrates must have visited Arabia and worn Arab clothes because he wanted to fit in. The picture of him was found in a 10 century AD history text book. Our books have old pictures in just like this one.

Response 2: This proves the Arabs learned from Greek medicine and some old ideas like using urine to diagnose infections worked so they stayed important for over a thousand years and may still work today. Over hundreds of years the Arabs may have forgotten where Hippocrates came from, or Greece was not called that anymore so they thought if he was important to Arab medicine he must have been Arab.

The first student conceptualizes the fifth century BC as an alternative present located in an earlier time when explaining why Hippocrates chose to wear Arab rather than Greek clothes. The temporal problem is likewise dismissed. There are old pictures in contemporary books so why not in the 10th century? The second student assumes medicine (and perhaps other aspects of material and symbolic culture) to have developed though time. She explains inconsistencies between recalled knowledge and the supplied stimulus material by suggesting that continuities in medical practice were accompanied by discontinuities in knowledge of medical history. In sum, student 1 conceives the past to be a series of chronologically ordered but temporally static topics—Egyptians, Greeks, Romans, Arabs, and so on—whereas student 2 visualizes long stretches of time and space in dynamic and developmental terms.

This and similar items yield useful evidence about students' historical thinking but are never completely effective in so doing. Some students fail to respond to items because they "don't know" or "haven't been taught the answer." Other students write whatever they know about the subject or context and hope for the best. More serious are misunderstandings of what is at issue. In response to the Hippocrates item, for instance, one student confidently asserted that Hippocrates could not have been a Greek because the woodcut clearly shows he was an Arab! In assuming a woodcut *from* the past to be a picture *of* the past, this student gives evidence of his historical thinking about a different dimension of the HT construct—that of *accounts*—dealing with, among other things, ideas and assumptions about ontological relationships between real and represented pasts. Other students construe the item in terms of an untargeted HT dimension—*sources of evidence*—and dismiss the woodcut as an *unreliable secondary source* produced centuries after Hippocrates died.

As aforesaid, the format of a CRI intended to assess declarative knowledge may resemble that of a stripped-down SRI: for example, "America was named after _______ _______." The critical difference between this CRI and similar SRIs is the substitution of a mark scheme for the mechanical key. "Amerigo Vespucci" would be the single key appropriate to an SRI, but students' responses to a CRI with the same content and format would be evaluated and scored at the discretion of an expert examiner. For example, "Vespucci" and "A. Vesppuci" might be answers thought to merit reward but "Amerigo Visconti" be deemed inadmissible. Marking is also unlikely to be binary. Two marks could be reserved for exact conformity with and one mark for worthy approximations to the model answer "Amerigo Vespucci." For longer CRIs demanding recall of HK, model-answer mark schemes may be used in one of two ways: (a) mark-worthy facts and judgments are listed and responses scanned for close matches; or (b) examiners use model-answers to inform personal judgments about the standard, organization, and expression of students' historical knowledge. Since students take different things from common teaching, and historical knowledge varies in quality as well as quantity, widening the scope allowed for examiner judgments is a concession to common sense. Its downside is frequently seen in reduced intermarker reliability.

For CRIs demanding evaluation and application of complex historical knowledge, mark schemes typically require student responses to be scored against

multiple criteria. Consider the following essay question: “The events of 1789–1799 failed to bring liberty, equality, or fraternity to the peoples of France. Why was this?” Since an argument is required, it would be crass to do no more than count correct and potentially relevant items of information and unrealistic to suppose that all students would apply their knowledge in the same way. A criteria-related mark scheme might allocate six marks under each of four headings:

1) **Selection of information relevant to:** (a) the chosen topic; (b) the question posed; and (c) the argument advanced.
2) **Use of information to decode the supplied statement.** Credit candidates able to: (a) distinguish contemporary from late-18th-century conceptions of liberty, equality, and fraternity; (b) exemplify the variety of meanings attaching to these concepts in the late 18th century; and (c) exemplify changes in conceptions of liberty, equality, and fraternity 1789–1799.
3) **Use of information to evaluate the supplied statement.** Give credit for: (a) differential evaluations of liberty, equality, and fraternity; (b) evaluation of information for and against the supplied statement; and (c) consideration of the point at which exceptions would invalidate the supplied statement.
4) **Use of information to develop causal arguments.** Give credit for effective use of information to: (a) construct and exemplify causal arguments; (b) qualify and/or evaluate causal arguments advanced by professional historians; and (c) identify causal factors and processes particular to different stages of the French Revolution.

In most mark schemes, criteria are derived from a single theoretical principle—whether philosophical, psychological, or disciplinary—and tailored to the contents of individual items. In the item above, the core principle is derived from four stages in Bloom’s taxonomy (Bloom, 1976). Other criteria-based mark schemes, for example, those devised to assess the HT constructs *evidence, perspective taking*, and *ethics* (Seixas, Gibson, & Ercikan, 2015), derive core criteria from analysis of history as an academic discipline. A virtue of such criteria-based mark schemes is their versatility. Criteria can be devised for assessing responses to items testing historical knowledge, thinking, or consciousness across broad spans of student attainment (Eliasson, Alvén, Yngvéus, & Rosenlund, 2015). This versatility comes at a price. Marking criteria are determined *a priori* and frequently match item writers’ intentions more closely than does the historical thinking and/or consciousness underlying students’ responses.

Construct-based mark schemes are less versatile and, as yet, applicable to no more than five or six dimensions of HT. In principle they could also be used to assess historical consciousness, but scaling of the putative dimensions of HC is as yet insufficiently robust for this to be viable. In Britain, research-based models of learning progression (MoP) particular to five dimensions of historical thinking—*accounts*, *evidence*, *change and development*, *causation*, and *empathetic explanation* (Blow, 2011; Lee & Ashby, 2000; Lee & Shemilt, 2003, 2004, 2009, 2011)—have informed the design of construct-based mark schemes in experimental public examinations for 16- and 18-year-old students. Headings derived from a model of learning progression for “change and development” (Blow, 2011, p. 47–55) are given below:

Change and Development Through Time

Level 1: *Change* construed as equivalent to an *event*. *Continuity* = "nothing happens."
Level 2: *Change* construed as any *difference* between two points in time. *Continuity* = "everything stays the same."
Level 3: *Change* construed as a *difference* that matters—is *significant*—for people living at the time. *Continuity* = "some things stay the same."
Level 4: Distinctions are made between *changes* significant at the time and over time, that is, having immediate and/or long-term *historical significance*. *Continuities* may also be locally and/or historically significant.
Level 5: *Development* is construed as a pattern of *change* and *continuity* over time. *Change* that is continuous in rate and direction = a *trend*. *Developments* involving shifts in rate and/or direction of change = *turning points*. Breaks in lines of *development* = *discontinuities*.

Headings may be expanded into detailed mark schemes particular to items addressing selected aspects of students' historical thinking about *change and development*.

Construct- and criteria-based approaches to marking differ in the assumptions made about what is assessed and in the nature of the scales used to grade learning outcomes. Construct-based approaches make no *a priori* assumptions about the structure or content of an HT construct. Judgments about *progress and regression*, for instance, are likely to be assessed in most criteria-based mark schemes pertinent to the *change and development* dimension, but because these judgments fail to correlate or cluster with other ideas and assumptions held about change and development they are excluded from current construct-based schemes (Blow, 2011). With respect to the measurement of learning outcomes, whereas criteria-based schemes score the *academic quality* of students' narratives, arguments, and judgments in terms of their correspondence with shared professional standards, construct-based mark schemes scale and describe *learning progression* along empirically identifiable dimensions of historical thinking particular to known student populations. This approach to marking generates information useful for formative and diagnostic as well as summative purposes. In common with constructivist research (Lee, 2006), it exposes the ways in which students use and ultimately transcend commonsense assumptions when making personal sense of the history taught. Construct-based marking has its downside, however. Some low-level assumptions (e.g., the equation of *changes* with *events*) may be deemed by parents and policymakers to merit neither recognition nor reward. A more serious limitation is that sequences of levels in construct-based mark schemes are generalizations inapplicable in one or more respects to most individuals and some groups (Shemilt, 1979). In sum, criteria- and construct-based approaches to marking yield different sorts of information and serve different purposes.

Knowledge Matters

Knowledge signifies, whether or not we choose to assess it. Students' ability to exercise historical thinking or display historical consciousness is constrained by what they do and do not know about the historical events referenced in test items (Körber & Meyer-Hamme, 2015). The improbability of students' knowledge being of constant depth and detail across specified content domains has long been recognized. In the UK, end-of-course assessments have evaded this problem either by randomizing the distribution of SRIs across knowledge domains or by offering candidates a choice of CRIs. Neither option is satisfactory for assessments of historical thinking or consciousness. SRIs rarely yield useful evidence of learning beyond knowledge recall, and the sheer number of CRIs required for effective assessment of one or more dimensions of HT or HC precludes item choice.

The extent to which assessments of HT and HC are distorted by variations in the scope, depth, and distribution of students' historical knowledge may be reduced—or evaded—in one of two ways. The simplest is design of information-open items that invite students to deploy whatever knowledge they possess. The following example, from a British S-level examination, requires knowledge and causal analyses of some—but of no particular—social, political, or economic crises:

> *"Great conflagrations from small sparks arise, but not because of them." (Plato)*
> Use your knowledge of history to argue for or against this statement.

More appropriate for younger students is provision of tailored databases for assessments of historical understanding and consciousness. Supplied materials may include information to be taken on trust and/or primary sources from which first-hand data can be derived. As one-third of an experimental British public examination, an instrument containing primary- and secondary-source materials on unfamiliar aspects of history was used to test historical thinking about *evidence* over a 15-year period (Shemilt, 1979). More ambitious and wide-ranging experiments with "unseen" sources and databases have recently been proposed or undertaken in Canada, Sweden, and Germany (Ercikan & Seixas, 2015). Advantages of database provision include the assessment of learning transfer and elimination of lucky-guess effects. Downsides include the premiums placed on organizational and data-handling skills and, when original sources are provided, on language comprehension. In particular, unless documentary sources are skillfully edited, their miscomprehension can compromise assessment integrity. Few contemporary students, for example, would read John Pym's observation "how fine a prospect is a fair backside" as complimentary to his garden.

Measurement Matters

Scoring systems fit for some purposes (e.g., determining whether the scores of individual students meet prespecified attainment thresholds) are not necessarily fit for others (e.g., monitoring shifts in national standards over time or evaluating

the impact of curriculum initiatives). When, however, we wish to illuminate learning routes or identify obstacles to understanding, descriptive profiles of group and population attainments are more useful than lists of individual scores or grades. Information is often lost or obscured in the process of quantification. This is obvious when different responses to CRIs are awarded the same mark on the grounds that variations in strengths and weaknesses reduce to qualitative equivalence. Information is also lost in the binary coding of most SRIs. Selection of the key statement in a multiple-choice item may indicate recognition that one statement (the key) is true, that all three (or four) distractors are false, or that the key is true and every distractor false, yet all three knowledge-states are scored as 1. The third state is quantitatively superior to the first two, but is recognition that the key statement is true inferior, equivalent, or superior to recognition that three (or four) distractor statements are false? Likewise, is a student unable to differentiate between the truth and falsity of four or five statements as or more ignorant than someone who knows two or three of these statements to be false? Or does the balance tilt according to the plausibility of the true and false statements? However these questions are answered, quantification entails loss of information about students' learning.

For many summative purposes loss of information is irrelevant or tolerable since data are only useful when presented in scalar form. Such purposes include monitoring educational standards over time, ensuring equality of opportunity across different student groups, and assessing the impact of educational programs and innovations. It does not follow, however, that any scale will do. Many statistical operations assume scales to be continuous, linear, and equal-interval. This can be contrived by arbitrarily attaching numerical marks to valid statements of fact or instances of conformity with mark-scheme criteria, albeit at the cost of deforming the data scaled. For example, Ercikan and Seixas (2011, p. 256) offer the following scaling rubric for the *continuity and change* dimension of HT:

Evidence Scoring Rubric

Level 1: Fails to identify any changes.
Level 2: Student makes basic observations about both continuity and change.
Level 3: Supports accurate claims of continuity and change with specific historical events from a variety of sources.
Level 4: All of (3) plus: presents insightful arguments and incorporates different perspectives. Recognizes power relations associated with continuity and change.

(It should be noted that, despite use of the term "levels," this is an *a priori* criteria-based mark scheme.) The scale running from levels 1 to 4 is ordinal, progressive, and monotonic. The nesting structure in which lower levels (i.e., criteria) are subsumed within higher ones ensures progression by design, and ordinal scaling is therefore valid. However, if variable numbers of marks were reserved for each of the above levels, ordinal scaling could no longer be assumed. For example, at L2 "basic observations" may vary in both number and quality, and were 2 marks reserved for responses falling into this category, a response containing two very "basic observations" might be rewarded more highly than a response containing

a single but less "basic" observation. In this and similar cases, inferences about individual, collective, and comparative student performance would be invalidated since information from a non-nesting intralevel would have been inserted into a numerical data set based on the progression of nesting levels.

All marking scales serve to distinguish between degrees of product quality ("Student X's response to item A is superior to that for item B") or learning progression ("comparison of responses shows that the progress of Student X accelerated during the last semester"). The distinction is semantic when models of learning progression are constructed *a priori* (i.e., when learning progression is equated with knowing how to produce increasingly better answers) but substantive when models of learning progression are research-based. For some formative purposes, it makes sense to construct scales on the basis of intended learning increments since this enables teachers to identify "steps" on which students tend to stumble and to act accordingly. With respect to national and state assessments, however, it is unlikely that the learning steps implicit in mark schemes will correspond with those instantiated in more than a minority of teaching programs.

This notwithstanding, mark schemes written around *a priori* scales of learning progression are generally easier to use than those based on *a posteriori* scales which can appear to reverse the natural order of things by ranking less accurate, well-written, cogent, or ingeniously argued responses more highly than seemingly superior ones. For example, use of a six-level *a posteriori* construct-based mark scheme to grade responses to a trials examination paper excited debate in the early days of the British SHP curriculum development project. The following item invokes recalled knowledge of "Medicine through Time" but was intended to assess mastery of the *empathetic explanation* (also called *perspective taking*) dimension of historical thinking:

> The Greeks stressed the importance of personal cleanliness, and the Romans spent a lot of money providing fresh water and building sewers. **This proves that they must have known diseases to be caused by germs.**
>
> *Explain why you agree* **or** *disagree with the conclusion in bold above.*

At the time (in the 1980s), examiners (including this author) were in agreement about the weakness of the two following responses but disagreed as to which is the weaker. (The spelling and punctuation of responses have been improved to enable comparisons of historical thinking.)

> **Response 1:** Aesclepius. These were the first hospitals and convalescent homes. They told people to wash and get some exercise. We still do this today. The Romans made a sewer called the Cloaca Maxima and piped water in lead pipes. Sometimes they got lead poisoning. We do this today with car exhaust fumes. We empty sewage into rivers like the Romans.
>
> **Response 2:** It must do. The Romans were very clever and built roads and viaducts. They even conquered Britain and built Hadrian's Wall. I suppose they noticed that mucky people got sick and worked out that germs lived in dirt. After the Romans people stopped caring about germs and thought God would save them clean or dirty.

In accordance with the mark scheme, Response 1 was scored as Level 1 (explanation by description). Although the question is not addressed directly, parallels between past and present practices are sought and found with the possible intention of demonstrating that "then" was much like "now," but there is no attempt to explore, let alone explain, how or what the Greeks and Romans might have thought. Response 2 was scored as Level 2 (explanation by assimilation to the present or by identification of deficits in the past). This student affords Romans the status of honorary contemporaries clever enough to have "conquered Britain" and, therefore, sufficiently smart to have worked out that germs live in dirt and dirty folk get sick. The commonsense perspectives of contemporaries are projected onto predecessors. Although flawed, the student's conjecture as to why people "stopped caring" about germs "after the Romans" supports the judgment that he was attempting to rationalize the ideas and behavior of people in the past.

Some teachers and examiners contested this ranking. By ignoring the Greeks, they argued, Response 2 only addressed half the question and, with respect to the Romans, no information pertinent to medical beliefs or practices was cited. Response 1, in contrast, offered relevant evidence and, even though no explicit connections with germ theories of disease were made, noted that some diseases had other causes. It is undeniable that, if defensible statements about Greco-Roman medicine are marked on a piecemeal basis, Response 1 may accumulate more marks than Response 2 but at the cost of rewarding knowledge rather than historical thinking. The alternative is to evaluate responses holistically and ask, "What must have been going on in the student's mind for this to seem a sensible answer to the question posed?" and—if possible—to identify "what was going on" as an instance of historical thinking described and scaled in the construct-based mark scheme. Such "best-fit" exercises in hermeneutic analysis typically result in responses deemed to manifest each level of historical thinking varying in quality of expression, argument, and factual reference. Such variations should not signify. Of more concern are variations in the confidence with which level assignments can be made. For example, the Level 1 assignment for Response 1 is insecure. It may be that the student cannot make sense of requests for explanation and simply responds to cues—"Greeks," "Romans," and "germs"—as to what she should write (i.e., a Level 0 code may be appropriate). It is also possible that she has misunderstood the question. If so, no valid inferences about HT can be made and a Default (D) code should be registered. Default codes are essential to construct-based mark schemes and scales but unlikely to apply to criteria-based mark schemes since by definition null, nonsense, and irrelevant responses are evidence of failure to meet the criteria specified.

When construct-based mark schemes are used, items registering high incidences of D-codes, for example, >5% or >10%, are unfit for purpose with the target student group and should be discounted. This is less problematic than might be supposed since allowances for item redundancy are required for other reasons. As previously noted, "common core" mark schemes should be used to scale responses to a set of items designed to assess learning outcomes across a single HT dimension. It follows that levels containing the same or contrary information cannot be summed; they can only be used to confirm or disconfirm other information. In an ideal world, were a set of 10 items used to assess historical

thinking about *causal explanation*, a Level 3 score on item 10 would do no more than replicate Level 3 scores on the first 9 items for each and every student with Level 3 attainment. In the real world, item design is imperfect and students' responses are muddied by beliefs and modes of reasoning extraneous to but interacting with those particular to the HT dimension at issue. Hence, for any student, multiple assessments against the same learning construct are less likely to yield a single rather than a spread of levels. Summing or averaging a level distribution would combine true and error scores in uncertain ratios. No coherent meaning could be attached to such an aggregation. The optimum measure of each student's learning, the score most likely to be both accurate and valid, is the modal level in what, more often than not, would be a leptokurtic distribution (closely clustered around the mean).

Assessment of historical thinking dimensions is further complicated by the need to discount items correlating insufficiently well with other items to suggest that a single learning construct is being scaled. Assessments of HT are unlikely to be pure and homogeneous. Variance in scores awarded is certain to have sources other than those targeted, and incidental as well as intended assessments may intercorrelate. It follows that the ideal of a *unidimensional* scale, registering learning progression along one and only one dimension, is just that—an ideal. Aside from the errors and biases of assessment practices, the HT dimensions targeted cannot be orthogonal to each other. For instance, students' historical thinking about the use of *evidence* must, on occasions, become entangled with ideas about the nature and status of historical *accounts*.

Future research may illuminate such points of contact. For now, it is reasonable to suppose a set of items for which all entries in a coefficient of determination matrix exceed 0.50 to be *unidimensional* and hence construct-valid for the purposes served by state and national assessments. (That the construction of such a matrix assumes use of interval rather than ordinal measures renders the >50% shared variance criterion more rigorous than it appears.) Conformity with this criterion does more than keep our metaphysics dry. It guarantees that each item used to establish modal level scores yields sufficient evidence pertinent to a single construct dimension for it to be deemed more homogeneous than not. The British experience with experimental examinations attaching to curriculum development projects suggests this requirement to necessitate the routine discounting of some test items and, in consequence, an increase in the length and/or number of assessment instruments. For state and national testing agencies this is a hard sell.

Equally problematic is the convention of reporting whole subject grades. The aggregation of data from multiple-choice tests of declarative historical knowledge can be conceptually sound. Difficulties arise, however, when we wish to aggregate or average scales pertaining to different constructs—historical knowledge plus historical thinking plus historical consciousness—or for different dimensions of the same construct. Level distributions across several dimensions of historical thinking in experimental British examinations exhibited different, and sometimes radically different, ranges and shapes. For example, a composite HT score of Level 7 derived from assessments of two HT dimensions, say *change and development* and *causal explanation*, would signify the same mastery and

depth of historical thinking whichever of eight possible combinations of levels were summed. More serious still, scales for the two dimensions appear not to be coextensive (Shemilt, 1979). Learning tends to progress more rapidly along the change dimension than along the causation dimension. It follows that scores of Level 4 for causation and Level 3 for change indicate greater progress in historical thinking than would the converse. It is reasonable to suppose that similar problems attend the aggregation of scales generated by two or more criteria-related mark schemes. If so, it follows that aggregation of historical thinking scales for individual dimensions entails both information loss and degradation of what can be validly inferred about progression in the overall quality of HT across any two points on an aggregated scale.

In sum, we cannot be sure what an aggregated HT scale would signify—what information it contains and whether a given score necessarily indicates qualitatively superior historical thinking than does each and every lower score. We can, however, be sure that it does not mean what we would like it to mean. Such uncertainties could be avoided by the simple expedient of reporting learning outcomes for individuals, cohorts, and populations as profiles of levels for each HT dimension assessed. That attainment profiling would be unpopular with parents, employers, and other end-users of assessment data is doubtless why examination boards and state and national testing agencies have thus far baulked at the proposition.

A final measurement problem is that of scaling everything we wish to teach and assess. For example, many teachers attempt to develop students' understanding of individual and collective action in history. Younger students often fail to distinguish between action and event, between willfully doing something and the intended and/or unintended consequences of so doing. To begin with, they may also explain both action and event with reference to the character and status of an agent. Over time students develop an understanding of *intentional explanation* in history and learn to construct models of goal-oriented action embracing access to information, definitions of situation, and weightings of anticipated gains and losses. Well-taught students learn to make use of biographical data by differentiating explanations of individual, group, and institutional "actions" and by situating agencies within reconstructions of past worlds instead of extrapolations from known presents. Progression in students' mastery of *intentional explanation* is evident to teachers and researchers but, thus far, has defied scaling as a unitary dimension of HT. Segments of a potential scale appear to mingle with those for *causal* and *empathetic explanation*. For example, students assessed as thinking at one *causal explanation* level conceptualize economic and environmental, social, and other "causes" as "senseless agencies" which—like human beings—make other things happen (Lee & Shemilt, 2009). It may be that *intentional explanation*, while critical to the teaching and learning of history, is more active behind the arras than center stage in students' historical thinking and, as such, continues to defy scaling and measurement.

More mysterious still is the structure of learning progression in historical consciousness, a construct that may prove to be unitary, replete with

dimensions, or impossible to scale with reference to demonstrable learning outcomes. Research into HC continues in North America and northern Europe, there being evidence to suggest "that to move from one level of historical consciousness to another, students must have previously developed specific elements of historical thinking" (Duquette, 2015, p. 61). This is encouraging even though the levels to which Duquette refers are step-points in a theoretical construct, not levels derived from analysis of assessment data. The nature of historical consciousness remains difficult to pin down and its progression has yet to be demonstrated beyond a peradventure. We must hope for a breakthrough since resolution of these problems may prove critical to the continued inclusion of history education within overcrowded high school curricula.

Possible Futures

Where might assessment go over the next few decades? What learning constructs will educators seek to assess? It is difficult to imagine a future in which knowledge of the past is not assessed, but in an increasingly globalized world some shift from national and tribal histories toward "big" histories, both temporal and spatial, may be anticipated. Assessment of historical thinking could become commonplace if, against the odds, it were possible to develop valid measures of "common-core HT" to which learning progression in the current five or six dimensions contributes. As an alternative, state and national testing agencies might seek to assess attainment against discrete HT dimensions on a cyclical or random basis with perhaps as few as two dimensions being addressed in any given year. Should history remain a compulsory core subject in mid-21st-century school curricula, it could be because—despite current difficulties in construct definition and scaling—measures of historical consciousness demonstrate the social, political, and economic benefits of historically literate and conscious populations.

The nature of future assessment practices depends in part on what researchers and educators discover and determine about the teaching and learning of history. To be pessimistic, students may continue to take much of what they are taught on trust without expecting it to make sense. Constructivist research into how and why students construct "impossible world" answers to "insoluble problems" demonstrates the extent to which they are prepared to play learning games dissociated from realities they know and experience (Schubauer-Leoni & Ntamakiliro, 1998). In the classroom they often look for cues, clues, and algorithmic procedures that yield answers acceptable to teachers and write what they "think they ought to think" in response to test items. In a more positive future, we may seek to render assessments less vulnerable to "teaching-to-the-test" pedagogies by designing items that encourage students to have adventures with ideas. Challenges high in conceptual *abstraction* need to be low in factual *complexity* and vice versa. Should advances in cognitive load theory continue, it may become possible both to control the complexity of *knowledge application* tasks

and to assess students' responses in ways that reflect what they can do with their learning as well as what they have learned (Paas, Tuovinen, Tabbers, & Van Gerven, 2003).

What purposes might be served by future assessments? If, as hoped, we learn how to assess and evaluate socially productive manifestations of historical consciousness, national testing may focus upon HC to a greater extent than on other constructs. Such a development is, however, contingent upon shifts in national policies and educational priorities as well as on positive research outcomes. Greater emphasis may also be placed upon the formative and diagnostic uses of assessment data, but reality is unlikely to catch up with rhetoric unless shifts in national policies render "teaching to the test" as unprofitable as it is pernicious and enable teachers to access assessment data containing qualitative information about learning and mislearning particular to student cohorts they have taught. Reform of training courses may also be necessary to ensure that teachers use published research findings, HT assessment criteria, and level-based scales with flexibility and discretion.

Published models of learning progression are valid and reliable for student cohorts and populations but not for individuals. With reference to HT, HC, and complex HK, the learning progression of individual students is neither measurable nor predictable with the confidence necessary to justify high-stakes and irreversible decisions about their educational options or career pathways. "Advances in competence" are often nonlinear and undetectable by standard assessment procedures unless and until "preceded by small steps of internal reorganization" (von Glasersfeld, 1995, p. 190). There are, for example, reasons to suppose that historical thinking (and perhaps historical consciousness also) oscillates between and across levels in response to variations in the quality of a student's knowledge base and prior commitment to political, social, and ethical positions. Students capable of deep historical thinking will often make shallow responses when their factual knowledge is superficial and prefer simple to complex reasoning when committed to particular statements and judgments. It follows that, for both individuals and groups, learning progression against any dimension of historical thinking may be more usefully represented by a band of *occasionally used levels* spanning and additional to a single *frequently used modal level*. If properly executed, such a move beyond our current insistence upon attempting to use deceptively precise points and numbers to scale learning and intellectual development might facilitate reflexive learning and encourage students to think about their own historical thinking.

On a less sanguine note, the sole prediction worth betting on is that many current uses of assessment data will persist for the foreseeable future. Test grades reward and incentivize students, render selection processes for employment and higher education less partial than might otherwise be the case, and contribute to well-established rites of passage. We may feel compelled to wink at the failure of single-subject summative grades to live up to their billing but should strive to do so without deceiving ourselves or others. As Aristotle advised young rulers, "Pay due honor and observance to the gods, but not so much as to give the impression of being feeble minded."

Endnotes

1 Both the item and analysis of student responses are taken from previously unpublished evaluation data pertaining to the British Schools Council Project "History 13–16." One-to-one interviews were used to investigate why students responded as they did to this and other SRI items and the extent to which such items could yield useful information about how they made personal sense of what they were taught. Although no general conclusions about the use of selected-response items to assess *historical thinking* can be drawn, the example provided may serve to illustrate some of the dangers and difficulties of using SRI items to assess complex learning outcomes.

2 These previously unpublished data are taken from an externally set, marked, and moderated British 16+ examination paper targeted at students of middling attainment for which the author was Chief Examiner. The examination board no longer exists and records of past examinations may be impossible to trace. The information cited is taken from the author's personal notes.

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18

Reconceptualizing History for Early Childhood Through Early Adolescence

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The title for this chapter requires some explanation. We debated about how to designate the subject of our review—children from ages 4 through 13. International labels for presecondary education vary considerably. Research on *early childhood*, for instance, may reference children anywhere from birth to age 8. Similarly, the research literature reflects an overlap between *primary* and *elementary* and *elementary* and *middle level* age ranges. For our purposes, *early childhood* describes children from 4 to 6 six years of age; *elementary* refers to children from about 6 to about 10, and early adolescence from about 11 through 13.

Labels aside, the body of evidence on how presecondary students come (or do not come) to understand the past has grown over the past half century, although it remains slight relative to secondary history teaching and learning. As a result, we reference research in secondary settings to suggest possible parallels across age groups and to suggest areas of needed research. Overall however, a reading of the available literature suggests the need to reconceptualize what we mean by teaching and learning history in early childhood, elementary, and early adolescent educational settings.

In this chapter we draw on international research to argue that there are sound cognitive and disciplinary reasons for teaching history in the larger context of cross-disciplinary, thematic inquiries. We base our argument on the proposition that because so many of the problems or issues that face citizens in a pluralist democracy cross disciplinary boundaries, a cross-disciplinary thematic approach is often a more authentic context for historical study than a single-subject approach can provide. First of all, students can see how historical thinking grows from and contributes to problem solving in the real world. This is very different from the decontextualized exercises in reading in the content areas reported in more recent studies of “integrated” classroom practice (Rock et al., 2006; VanFossen, 2005). Studies of students engaged in authentic thematic inquiry

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describe children learning to read, speak, listen, and write, not to prove that they have a particular skill set, although they certainly develop a variety of skills, but in order to answer compelling questions about the world around them. This suggests three themes we address in this chapter: the place of the content of history (*first-order concepts*), the place of the intellectual tools students use to understand how the history they encounter came to be known as well as to create their own evidence-based interpretations (*second-order concepts*), and the consequences of inequitable opportunities for students to encounter either in any meaningful way.

Content, Time on Task, and Concepts

Education researchers have considerably enhanced knowledge of *teaching* and *learning* history, but they have spread their attention unevenly across the subject. While researchers occasionally remind us of the importance of the *content* of history courses, their research studies in the main concentrate on second-order concepts. By default, then, research findings on first-order concepts tend to hail from fields such as comparative education and curriculum studies, commonly with a research focus on bias or perspective in historical content (Thornton, 2006). To be sure, this research has been informative. As one comparative-education scholar comments on this type of research, it is significant because it instantiates how, as a school subject, "history is saturated in cultural particularities" (Nicholls, 2006, p. 7). Thus, it is not altogether surprising to hear that Singaporean students are expected to imbibe "the 'Singapore Story'—a straightforward tale adopted by the political leaders that charts how an independent Singapore overcame the odds to become a peaceful and prosperous country" (Sim & Print, 2009, p. 708). Nor that in Northern Ireland educators strive to direct history away from issues of nationalism, which is assumed to be too controversial and hence risks heightening antagonism between politico-religious communities (Barton & McCully, 2012). As important as this content is, it is only part of the story about content as a variable in teaching and learning history.

In this section we introduce dimensions of content in teaching and learning history that may have received less attention. Since first-order concepts "hold the facts of a unit [of study] together" (Yell, Scheurman, with Reynolds, 2004, p. 36), they are a basic element of teaching and learning. Indeed, they are often called the "substance" of units of study versus skills or intellectual tools (i.e., second-order concepts). For examples of distinctions between these two elements of teaching and learning, see Harnett (1993) and Lee and Ashby (2000). Nevertheless, this distinction between substance and tools is easier drawn than delineated as they are interwoven in practice and difficult to disentangle for purposes of research (e.g., De Groot, van Boxtel, Ros, & Harnett, 2014). This does not detract, however, from its usefulness for orienting our discussion and is, in any case, a distinction widely drawn in the research literature.

Throughout this chapter we have lent greater credence to studies of history as it is enacted in schools because this is where modal learning experiences in the subject occur. Of course, significant opportunities for teaching and learning of

historical concepts can and do occur in settings other than schools—for example, children hear tales about the past from their families and neighbors, visit museums and monuments, view media accounts of historical people and events, and the like—but learning history in nonschool settings for most children is less systematic than their instructional experiences over time in classrooms (and extensions thereof such as homework). Moreover, teacher mediation of learning ordinarily makes a significant difference in the ways children learn history (Harnett, 1993).

It follows that, to a significant degree, understanding the possibilities of and constraints on teaching and learning history obliges researchers to look behind the classroom door: What is the role of the teacher? In what kinds of activities do students engage? What counts in assessments as evidence of learning? With what types of instructional materials do students interact? Research studies lacking answers to such questions about the ecological web within which teaching and learning unfold should be regarded as possibly suspect for informing educational practice because "once 25 students walk through the [classroom] door, things change, often dramatically" (VanSledright, Kelly, & Meuwissen, 2006, p. 220). The most potent and lasting effects of instruction stem from what teachers and students *do* during lessons (Dewey, 1963; Stodolsky, 1988).

Time on Task

Where possible, too, we contend research studies will profit from accounting for the amount and character of time allotted to history in school programs—another dimension of teaching and learning inadequately represented in research investigations conducted out of context. Time matters because few education research findings are as powerful as time-on-task: It reveals a robust correlation between the amount of learning and the time devoted to it. Furthermore, it matters whether that time is regularly scheduled or only available erratically or piecemeal. Perhaps most critical of all is *how* time is used, the manner in which teachers and children engage with content (Levstik, 2008).

At present, time appears to be a more important variable than it once was because around the globe the time devoted to history in childhood education has been falling. While, to be sure, the curricular time allocated for historical subject matter rarely or never has equaled the time allotted to numeracy and literacy (Alleman & Brophy, 2003), this disparity has been amplified in recent decades by history losing ground to science, technology, engineering, and math (STEM). Recognition of a decline is hardly news, of course. Over 20 years ago researchers were pointing to an alarming reduction in time for history in a number of countries across the globe, including England, the United States, Scotland, Canada, France, and Australia (Knight, 1993), but the decline appears to have accelerated since.

Finally, researchers of history teaching and learning should also take into account other changes such as that reduced time for history has not equally affected all children (Levstik, 2012). Because children in lower tracks are disproportionately assigned to remedial programs in subjects such as reading and mathematics, they consequently receive less time for history than their peers in more academically

advanced tracks. Again, this is a long-noted observation and can be reliably documented back to at least the mid-20th century (e.g., Goodlad, Klein, & Associates, 1974). Few studies take full account of the intervening variables in teaching and learning history we have just recounted. We think it should give interpreters of studies some pause. Although repeated comment about it would get tedious, we have kept this proviso in mind during construction of this chapter.

First-Order Concepts

Educators have long attributed more significance to conceptual or substantive content than to factual content because the former holds greater intellectual power: Concepts can be applied to new contexts whereas a fact does not generalize (Beyer, 2008). Thus, children either know the Norman Conquest of England happened in 1066 or they do not. On the other hand, concepts children encounter in study of this same period in European history such as *feudalism*, *peasant*, *castle*, *lord*, and so forth can be applied (and elaborated upon), that is transferred, to later times in European history, to a study of Japan in the era of the shoguns, or to tsarist Russia.

Concepts are "hierarchical." "High order" concepts are at a greater level of "abstraction, complexity, [and] generality" (Taba, 1967, p. 36) and are also referred to as *larger concepts* or *generalizations—cultural change*, *migration*, and *urbanization* are examples. Rather confusingly, in the literature first-order and second-order concepts are also sometimes conflated as "conceptual knowledge" (e.g., Yell, Scheurman, with Reynolds, 2004, p. 36) or "concepts and big ideas" (Libresco, 2014). Aside from such conflations, taken together the foregoing examples of concepts are generally all treated as first-order concepts by researchers of history teaching and learning (see Lee & Ashby, 2000). In summary, concepts and the relationships among them can be considered the cognitive substance of history while cognitive tools (or second-order concepts) provide its procedures or methods (e.g., identifying cause-effect relationships, appreciating the perspectives of people in the past).

Determining that concepts deserve precedence over facts, however, still leaves a larger number of worthwhile concepts that could be included in an instructional program than time or space allows. Inevitably, therefore, curricular-instructional gatekeepers must pick and choose based explicitly or implicitly on some educational principle or purpose (Thornton, 2005). But, what principle or purpose? In a democracy not all concepts have an equal claim on the curriculum, suggesting that concept selection be guided by a criterion of relevance to educating children to live in a pluralistic democracy (Brooks, 2014). By this criterion, we would want to supplement an oft-recommended exemplary inquiry exercise on second-order concepts—an exercise with conflicting and inconclusive primary sources, "Who fired the first shot at Lexington Green?" (e.g., Scheurman, 1998)—with a first-order conceptual question. For instance, we might ask, "Why do people care who fired the first shot?" Lacking such a supplement, Barton and Levstik (2004) point out that it can be an educationally empty exercise "to inquire into events without caring that they occurred" (p. 240). In other words, a commitment to democratic pluralism should undergird content decisions.

This maxim should be applied from children's first introduction to historical subject matter. In the early childhood classroom, this introduction to learning about the past may be encountered in the setting of stories, fictional or informational, read to children. In the United States, history may be folded into the broader subject field of social studies. Even more broadly in France, it may be "brought together" with "geography and science, as well as civic education" (Baques, 2006, p. 114). Whatever form children's early encounters with history take, it is likely to be presented as a narrative. Typically narratives for children feature schemas which lend thematic direction and, the concern here, frame the meanings and significances of embedded concepts (White, 1988; Wills, 2011).

A seemingly fruitful place to examine children's interactions with narrative schemas is with historical fiction because this genre is widely taught and thought to hold considerable potential for shaping how children perceive an historical actor, group, event, or era (Levstik, 1990). There is nonetheless scant empirical research on what children learn from historical fiction. To what extent, for example, do children conflate factual and fictional events and characters (see McTigue, Thornton, & Wiese, 2013), or what are the consequences for learning when the fiction contains a bold schema with potential to close students' minds to contradictory evidence?

Another way younger children encounter historical subject matter is through lessons on heroes and holidays. Biographies of famous historical figures such as Columbus as well as individuals whose lives are held up as exemplars such as George Washington Carver and Helen Keller appear to be commonly used but, again with a few exceptions (e.g., James, 2008), there has not been a great deal of research about teaching and learning this type of material.

Also common is study of holidays or festivals such as Cinco de Mayo, Chinese New Year, Martin Luther King's birthday, or Thanksgiving as well as special curricular observances such as Black History Month. These kinds of studies are possibly an aspect of history instruction that has survived relatively unscathed in recent decades. This material would seem to offer engaging learning opportunities for children as it easily lends itself to more lively activities than paper-and-pencil tasks, such as sampling foods from a particular culture, dressing in clothes or building models of peoples' houses from other times or places, or role-playing an historical event. While it seems safe to say children enjoy such activities, critics caution that these activities can result in miseducative learning experiences disconnected from an ongoing curriculum. These warnings include, for instance, how readily inquiries into unfamiliar cultures can descend into stereotypes (Banks & Banks, with Clegg, 1999) or prompt children to respond to cultural difference as merely quaint and exotic rather than expressions of legitimate differences in how humans live and believe (White, 1989). Still other critics have observed that "the holiday curriculum" can be intellectually empty, presented without regard to whether children learn anything substantive or new as the same ritualistic activities are reenacted year in and year out across grade levels (Gross, 1973).

Thus far we have reviewed some of the forms through which history is delivered in the curriculum for young children. Some history educators strongly insist that instruction built around historical concepts is a ready remedy for vapid

activities such as "the holiday curriculum." We certainly concur that, effectively marshaled, concepts may enrich otherwise intellectually empty history lessons. An analysis of a lesson for first graders (about 6 years old) on what the Pilgrims ate at the first Thanksgiving dinner in 1621 provides a good example (James & McVay, 2009). This case study demonstrates how children developed concepts by investigating and classifying types of foods (e.g., foods from the sea versus foods from the land) and continued on to hypothesize how transportation costs may discourage consumption of foods from far away.

This is surely an intellectual advance on cutting out paper turkeys. Nonetheless, it does not support the oft-made claim about the indispensability of organizing subject matter along strictly disciplinary lines since concepts such as *transportation costs* and *consumption* come from the social science of economics. Indeed, virtually all historical concepts are derived from or shared with the social sciences. The contribution of history to conceptual understanding in this case is not its unique concepts but rather "derives from the way in which it provides concrete instantiations of general and abstract economic concepts" (Thornton & Barton, 2010, p. 2484).

A Focus on Disciplinary History?

We should question when researchers jump to the conclusion that more "substantive history" *ipso facto* will provide rigorous and effective alternative instructional sequences. Wills (2011) seems to reach just such a conclusion in his examination of a year's instruction in California and in early American history in fourth- and fifth-grade classrooms (ages 9–10, approximately). He documents how this material tended to be taught in leftover time in the school day by teachers not necessarily well-versed in history employing a curriculum which was poorly articulated and which overemphasized a schema about gold and greed as an all-encompassing explanation for exploration, migration, and settlement. Wills (probably correctly) fears this schema was reinforced by the curricular-instructional conditions and resulted in oversimplified and superficial learning by the children.

While the educational problems in the setting were undeniably significant, even possibly overwhelming, Wills's (2011) analysis strikes us as unresponsive to the pedagogical situation. He objects that students studied two units on the geography of California and "five California Native American tribes," which he describes as "not about history" (p. 138). Yet, what is to be learned here is less about history than about a group of concepts which could be learned just as well from, say, cultural geography or anthropology (Barton & Levstik, 2004; Thornton, 2007). Interestingly, an item on the U.S. History National Assessment of Educational Progress (National Center for Education Statistics [NCES], 2011) test for fourth graders covers more or less identical material under the theme of the "culture" of the Sioux (p. 18) prior to White settlement, which Wills dismisses as a problem in his study because it is not "history." Parenthetically, Wills's reasoning appears to be that to rate as "history" the material must show a sequence of historical events. We wonder, further, whether he attributes much educational significance to first-order concepts as he implies their greatest worth may be as

"groundwork for engaging in second-order ideas, for example about historical sources and evidence" (Wills, 2011, p. 141). As we said earlier, we take a different view. If history is to achieve either humanistic or civic goals, content matters. Histories told and untold matter. We agree with Culclasure (1999) that "ignoring this responsibility is to deny our common humanity" (p. 65).

We find Wills's (2011) suggestion that "a disciplinary approach to teaching and learning history ... would likely be quite useful" (p. 140) to be a *non sequitur*. History presents no more of a panacea to solving the multiple problems affecting teaching and learning in these classrooms than other disciplines such as anthropology might, let alone cross-disciplinary inquiry (which seems implied by the content of the instructional sequence in any case). Rather, the basic problems concern (putting aside the unmentioned socioeconomic context which is important in its own right but not the immediate concern here) matters such as curricular-instructional design, organization, and delivery. These would not simply yield if a more disciplinary approach were adopted. Problems of insufficient continuity of subject matter, a slapdash curriculum design, and so forth will not be solved by a disciplinary cure-all.

The Place of Intellectual Tools in Learning History

If we begin with the premise that thinking historically contributes to students' becoming "competent and confident learners and communicators ... secure in their sense of belonging and in the knowledge that they make a valued contribution to society" (Hedges & Lee, 2008, p.13) then *what* students learn is inextricably linked to *how* they learn it. We recognize that in many parts of the world history education has been nationalistic and instructionally didactic, less inclined to advance the humanistic and civic potential of history education than to indoctrinate "vulnerable receptors of the national past" (Clark, 2004, p. 382). To be sure, instruction need not be nationalistic to be antidemocratic. Students can be pressured to adopt the perspectives of teachers (or, for that matter, historians) in the context of historical inquiries just as they can through any other form of instruction (Barton & Levstik, 2004). At minimum, realizing the humanistic and civic potential of history education requires that students collaborate with others to construct evidence-based interpretations of the human past and, to the extent possible, apply these interpretations to civic issues in and beyond the classroom. This kind of collaboration involves more than superficial group work. Rather, young students participate in communities of inquiry based on respect for and willingness to work with diverse others who share public spaces with them (Aitken & Sinnema, 2008; Claire, 2002; Cooper, P., 2009; Paley, 1992).

Scholars have long argued that some form of disciplined and cross-disciplinary, reflective inquiry offers a theoretically, pedagogically, and civically sound way to build such a community starting from early childhood. As early as 1898 Lucy Salmon described elementary history in the United States as "defective" because it was "not studied in connection with other subjects in the curriculum" (n.p.). In the first decades of the twentieth century, early childhood and elementary educational reformers in many parts of the world adopted various forms of

interdisciplinary and collaborative work, including Kilpatrick's (1918) project method. By the second half of the 20th century, the British Infant School and Whole Language movements and the *atelier* approach associated with Reggio Emilia in Italy furthered interest in an inquiry approach intended to shift "established points of view and favor a more complex approach to problems … than are inherent in any discipline or specific problem" (Vecchi, 2005, p. ix). During this latter period, researchers focused on how students formulated and solved "new problems of a practical as well as an academic nature" (Wells & Chang-Wells, 1992, p. 99).

Literacy researchers, in particular, examined how multiple expressive genres mediated student learning during exploratory, interdisciplinary instruction, although little of this work attended specifically to history (Bruner & Weinreich-Haste, 1987; Gandini, Hill, Cadwell, & Schwall, 2015; Wells & Chang-Wells, 1992). With the rise of domain-specific theories of cognition, however, more researchers turned to the examination of concepts they identified as specific to historical thinking (Ashby, 2004; Levstik & Barton, 2008). In England researchers with the CHATA (Concepts of History and Teaching Approaches) project identified a developmental progression during which students' thinking gradually approached that of disciplinary experts—in this case, historians (Dickinson & Lee, 1984). Other researchers examined historical thinking in naturalistic settings, focusing more on describing students' conceptions of history and less on the degree to which students approximated historians' practices (see Aitken & Sinnema, 2008; Levstik & Barton, 2008). Because the curricular behemoths of literacy and mathematics dominate the early years of schooling, history of any kind can be difficult to find (Fitchett, Heafner, & Lambert, 2014; Pascopella, 2005; Rock et al., 2006). For this and other reasons, some researchers turned to designing and implementing classroom-based inquiries (see VanSledright, 2002) or eliciting historical thinking in the context of individual or small group tasks and interviews (see Levstik & Barton, 2008).

What, then, can we say about the acquisition and use of intellectual tools related to disciplined, reflective, historical inquiry from early childhood through early adolescence? Generally, when history education researchers discuss *historical* inquiry they describe a process of asking questions about and investigating human experience using skills and concepts from history and the social sciences. The extent to which that process is open-ended, cross-disciplinary, thematic, or guided by civic and disciplinary purposes, however, shifts across grade levels and over time and often frustrates our ability to make sense of its various classroom incarnations. In order to make better sense of the status of historical inquiry in presecondary classrooms, it helps to consider inquiry's *disciplined* and *reflective* components. Historical inquiry is *disciplined* in the sense that it is systematic and draws on disciplinary concepts and content and *reflective* in the sense that students consider the humanistic and civic implications of their inquiries.

Disciplined Historical Inquiry as Systematic

When inquiry is *systematic* students learn processes of doing history: They craft historical questions worthy of investigation and seek out and evaluate the evidentiary grounding for the historical interpretations that ensue. Researchers

have examined these elements of inquiry to varying degrees, beginning with questioning (Croddy & Levine, 2014; Oliveira, da Silva, Valenca, Freire, & Costa, 2011).

Questioning

This often overlooked feature of historical inquiry is, as Gandini, et al. (2015) note, crucial to "organizing rich experiences in the world and with materials" so that students understand "underlying or overarching ideas" about the world (p. 2). At a more mundane level, questions motivate and sustain inquiry and sometimes connect inquiry, implicitly or explicitly, to informed civic action. For that to happen, not any question will do. Questions elicit answers in their own likeness. Insignificant, pointless, or silly questions get like answers in return—and even quite young students recognize such questions for what they are. A group of third graders (age 8), for instance, generated a set of questions they ultimately identified as ridiculous (Levstik & Smith, 1996). Finding out the number of doors or windows in their community, they decided, did not constitute useful or interesting information. Their teacher spent considerable time building their capacity to generate more significant questions, with the result that their final questions led them to investigate the historical roots of several local issues, including the rehabilitation and preservation of a natural spring that marked the site of their city's founding.

Other problematic questions may be less ridiculous than ahistorical. Asking students how they might have acted in difficult historical circumstances, or if people in the past should have acted differently in those same circumstances, for instance, rarely elicits historically grounded responses (Barton & Levstik, 2004). Analyzing the agency available to historical actors, on the other hand, more often leads students to reflect on what was possible in the historical moment. When a group of eighth graders investigated the differential power and influence of 19th-century women enslaved as cotton workers, women working in textile mills who spun slave-grown cotton, immigrant seamstresses who turned textiles into garments, and women who could afford to purchase these garments, their interpretations were filtered through the multiple perspectives of historical actors (Levstik & Groth, 2002). Students were not asked what *they* might have done; rather, they analyzed the choices available to people in the past, and considered the ways in which groups and individuals employed that agency. In the process, they also learned something about the history of effective civic and political action, including labor organizations and protective legislation.

Chin and Brown (2002) suggest that well-thought-out and historically situated questions sustain inquiry when they integrate "complex and divergent information from various sources" and generate "curiosity … skepticism [and] speculation" (p. 531). They also signal a restructured teaching/learning relationship in which students, teachers, and others work together to explore powerful ideas about human experience (Freedman, 2015). Although the dynamics of questioning's pivotal role in historical inquiry remain largely untested, there are some things we know, starting with students' *and* teachers' struggle to develop questions that motivate and sustain historical inquiry (Aulls, 2008; James & McVay, 2009; Rothstein & Santana, 2013).

James and McVay (2009) provide one of the few studies in which investigators set out to "help [first graders] learn to ask critical questions of texts and consider the complexity of historical knowledge construction" (p. 348). Their detailed analysis of how a student-teacher and her first-grade class learned to craft questions demonstrated that, with mentoring, teacher and students came to better understand the complexities of developing what they identified as critical questions, of investigating those questions, and, finally, of constructing evidence-based interpretations. These findings are consistent with earlier studies that documented the development of questioning strategies in economically and socially diverse settings (Levstik & Groth, 2002; Levstik & Smith, 1996).

A second finding relates to how few students of any age engage with questions that encourage them "to interpret texts, make connections, solve problems, support or dispute ideas, or ask further questions" (Dull & Murrow, 2008, p. 398). When students do engage in such activity, it occurs most often in high-ability, low-diversity schools—an equity issue that should give history educators pause (Dull & Murrow, 2008). Although this is a concern for all students, it is particularly so for minority and low-income students who appear to have the least opportunity to engage in any form of substantive historical study. Ironically, at just the point when we have evidence that children begin developing their ideas about history and the past at an early age and can engage in cognitively appropriate inquiry even in the early years of schooling, schools provide reduced opportunities to engage with history (Fitchett, Heafner, & Lambert, 2014).

Equally disturbing, there is a disconnect in the research literature between questioning and source use. Despite the fact that a document, image, or other object becomes a historical source only in relation to a historical question, a mere handful of researchers investigate how questions facilitate younger students' effective source use (Arias & Egea, 2015; James & McVay, 2009; Levstik & Smith, 1996). Instead, attention focuses on the nature of the sources and younger students' ability to interpret them, often with no substantive historical question guiding their interpretive work.

Source work and interpretation

Finding appropriate and accessible historical sources for students from early childhood through early adolescence can be a challenge. Increasingly researchers use visual images and, to a lesser extent, artefactual sources in an attempt to minimize readability issues (Arias & Egea, 2015; Dierking, 2003; Hicks & Doolittle, 2008). Image and artifact, however, present their own set of challenges (Vella, 2001). Desai, Hamlin, and Mattson's (2009) suggestion that learning history might be "as much a visual question as it is a textual one" highlights the importance of understanding how students read visual sources (p. 6). As Marcus, Paxton, and Meyerson (2007) note, students of all ages draw much of their historical information from visual media, but few have the skills to critique what they see. This is problematic enough with older students who have had some instruction in history, but it is especially challenging with younger students who bring very little reliable historical background to bear in analyzing what they see or hear (see VanSledright, 2002).

Fortunately, young students prove remarkably adept at reading images and material culture when sources are carefully contextualized and related to questions students perceive as interesting and important (Arias & Egea, 2015; Davis, 2005; Levstik, Henderson, & Lee, 2014; Nikolajeva, 2003). Visits to historic sites, museums, and archaeological sites, for instance, help students imagine the physical contexts for historical activity. Without instructional mediation, however, students struggle to connect their own observations with docents' explanations, signage, and previous instruction (Goodacre & Baldwin, 2005). In one study (Levstik, Henderson & Schlarb, 2005), 10- and 11-year-olds participating in excavating slave dwellings on a former plantation became confused when a docent explained that the owner of the plantation, a slaveholder, had been antislavery (he supported colonization of freed slaves to Liberia). In the same study, another group of students reflected a misconception developed during previous historical study when they identified a length of metal buried in an excavation pit as evidence of the Underground Railroad. Their earlier study led them to assume the Underground Railroad to be something like a subway. It required only a small leap to decide that the former slave quarters would have been the perfect stop for such a well-hidden train. Although similar misconceptions can occur at any age (Falk & Dierking, 2000; Heyking, 2004), younger students inexperienced with historical or archaeological exhibits and sites are especially vulnerable to confusion (Davis, 2005; Levstik, Henderson, & Lee, 2014). Similarly, without specific scaffolding, students tend to misunderstand the human agency and innovation behind material objects, interpreting past activity in the light of present sensibilities (Davis, 2005; Falk & Dierking, 2000). Fortunately, these misconceptions, once anticipated, are generally amenable to instructional interventions (Heyking, 2004; Levstik & Henderson, 2016).

Other challenges presented by source work unite students across age groups. Without teacher mediation, students tend not to recognize the need to analyze or interpret sources or to consider that similar sources might provide evidence to support quite different interpretations (Ashby, 2004; Lee & Ashby, 2000). Students 11 years of age and younger tend to understand historical inquiry to work much like a jigsaw puzzle whose aim consists of creating a single correct picture of the past (Levstik, Henderson, & Schlarb, 2005; Medina, Pollard, Schneider, & Leonhard, 2000; VanSledright, 2002). Rather than consider how human intention and cultural contexts might influence the form and original meanings of sources, students of all ages often account for differences in interpretation in terms of bias or incomplete information (see Afflerbach & VanSledright, 2001; Bermudez & Jaramillo, 2001; Britt & Aglinskas, 2002). At the same time, other studies (Ashby, 2004; Britt & Aglinskas, 2002; Hoodless, 2002; Levstik & Groth, 2002; Saye, Kohlmeier, Brush, Mitchell, & Farmer, 2009) demonstrate how relatively minor scaffolding, including questions that motivate interest in "getting it right," enhance students' facility with different types of sources, especially in the middle grades (10–13 years old). Knight (1993) found that even very young children improved in their analysis of sources when guided by three simple questions: "What do you know for certain about it? What can you guess? What would you like to know?" (p. 95).

Fewer studies address students' historical thinking between 4 and 10 years of age. Arias and Egea (2015), however, developed an interesting method for examining 4- and 5-year-olds' use of visual sources. Having located an ancient Egyptian tale about an eloquent peasant who talked himself out of trouble and into the presence of the Pharaoh, they wondered how young children might make sense of this tale and its historical and cultural details. They commissioned highly stylized hieroglyphic-like wordless illustrated panels and presented them to the children as a mystery to be deciphered. These children ably interpreted chronological, class, and power relationships based on information in the illustrations. They recognized the story as both historical and universal—it had happened in a long-ago past, but similar things happened in their own time. Unique in its methodology and content, as well as in its focus on such young children, this study suggests rich possibilities for other research with young children.

Without teacher mediation, students tend to encounter difficulties in selecting and analyzing sources, following through on web-based instructions, and navigating unfamiliar interfaces (Dierking, 2002; Hicks & Doolittle, 2008). Opportunities for students to engage in historical inquiry with more experienced mentors reduce these difficulties (Ashby, 2004; Levstik & Henderson, 2016; Nokes, 2012). Nonetheless, challenges remain. Young students tend to abandon evidence in order to maintain narrative cohesion (Levstik & Smith, 1996; Stahl, Britton, Hynd, McNish, & Bosquet, 1996; Young & Leinhardt, 1998; VanSledright, 2002). They tend also to be more critical when sources touch on sensitive issues than when sources conform to their own perspectives (Levstik, 2001; VanSledright, 2002). Overall, young students experiencing inquiry as a disciplined system of study appear to do best with frequent, targeted mediation from teachers around question setting and extrapolating information from sources. Without such mediation, they are likely to ignore the initiating question, abandon evidence, and revert to familiar schema (Barton & Levstik, 2004; Heyking, 2004).

Disciplined Historical Inquiry Draws on Disciplinary Content and Analytical Concepts

The second way that historical inquiry is disciplined relates to the extent to which it draws on the disciplinary content (first-order concepts) and on analytical concepts (second-order concepts) associated with historical study. Although the labels for analytical concepts have shifted a bit over the past 40 years, historical agency, causation, chronology, empathy, evidence, perspective, and significance appear regularly in the research literature (see Heyking, 2004; Seixas & Morton, 2012; Yeager, Foster, & Greer, 2002). Analytical concepts help students understand how the history they encounter came to be known, how to evaluate claims made regarding the past, and how to create their own evidence-based interpretations of the past (Cooper & Chapman, 2009; Heyking, 2004; Huijgen, van Boxtel, van de Grift, & Holthuis, 2013; Peck & Seixas, 2008; Seixas & Morton, 2012; VanSledright, 2002; Wineburg, 2001). Although many of these concepts were once considered beyond the ability of students until late adolescence (Hallam, 1979), research over the past four decades argues for a very different perspective.

Chronology

Educators long regarded time as fundamental to historical thinking but so challenging for young students that they could not think historically in any reasonable way (Hallam, 1979; Sleeper, 1975; Zaccaria, 1978). As Thornton and Vukelich (1988) noted, however, early studies of children's developing sense of time actually failed to investigate *historical* time, or the ability to "depict a person, place, artifact, or event in the past using some form of time language" (p. 70). Instead, researchers focused on personal, clock, and calendar time assuming they were prerequisite to understanding historical time. Barton and Levstik's (1998) study of early childhood and elementary age students challenged this assumption, noting that even the youngest children (5 years old) made distinctions in historical time by relying on material culture (clothing, technologies, architecture). They argued that "children develop significant historical understandings prior to—and to some extent independent of—their use of dates and other aspects of adult temporal vocabularies" (Barton & Levstik, 1998, p. 419). In a more recent study of children from 3 to 9 years of age, Hoodless (2002) reached similar conclusions, noting that, given a meaningful context, "young children were capable of surprisingly sophisticated ideas" about chronology, including facility with temporal vocabulary and temporal sequencing (p. 1).

Perspective recognition

Another feature of students' historical thinking, the extent to which they recognize and take into account differences in historical perspective, continues to generate research and debate. Lee and Ashby (2001) conducted one of the largest studies on the progression of students' thinking about historical perspective. Based on their analysis of 320 students' written responses to perspective recognition tasks and follow-up studies with a subset of 92 of these students, Lee and Ashby (2001) noted the difficulty students had in setting aside their own perspectives when analyzing historical experiences and identified a linear progression beginning with seeing the past as largely unintelligible and culminating with students placing human actions within a broader sociocultural context.

More closely aligned with Knight's (1990) earlier research arguing for differential development of a set of subcompetencies, Barton and Levstik's (2004) synthesis of research on perspective led them to identify five competencies related to the development of what they labeled perspective *recognition*: a sense of otherness, shared normalcy, historical contextualization, differentiation of perspectives, and contextualization of the present, with the latter being the most challenging intellectual task for students of all ages. Each task, they argued, required that students recognize, but not necessarily take on, historical perspectives in order to understand their impact on (sometimes reprehensible) human behavior. Most recently, Huijgen et al. (2013) concluded that current research supports three competencies related to historical perspective, including the need to exhibit historical empathy, the ability to perform historical contextualization, and the ability to avoid presentism.

Empathy

Debate about the degree to which empathy is an intellectual and/or emotional enterprise persists (Barton & Levstik, 2004; Claire, 2002; Endicott, 2010; Heyking, 2004; Lee & Ashby, 2001; Skolnik, Duhlberg & Maestre, 2004). Barton and Levstik (2004) argued against an either/or characterization of empathy. Instead, they described *care* as motivating the empathy necessary to recognize different perspectives that in turn help students understand the constraints on agency that shaped different perspectives. Levstik and Groth's (2002) study of early adolescent students investigating antebellum America from women's perspectives provides a case in point. Students were initially less critical of sources that conformed to their own perspectives on women's history, tending to dismiss opposing perspectives as ill-informed. The structured introduction of contending sources resulted in more nuanced interpretations of different perspectives and deeper recognition of the contexts within which historical actors operated. In contrast, Wooden (2008) found that early adolescent students had considerable difficulty contextualizing emotionally charged historical information when they had little time to process their initial reactions. Early adolescents in New Zealand had similar difficulties with perspective recognition when emotionally charged historical information was close to home rather than distant in either time or place (Levstik, 2001).

This should not be surprising. Human perfidy ought not leave anyone unmoved, seasoned historian or novice historical inquirer. Rather, the care or emotion that motivates an empathetic response may, in the context of carefully scaffolded historical inquiry, mature into a deeper, more contextualized understanding of people, ideas, and events. Early childhood through early adolescence, students have been shown to be surprisingly empathetic across some differences when sources introduced points of identification as well as points of contrast (Levstik & Henderson, 2015). Without sufficient time and scaffolding, however, the picture is quite different. In addition to simplifying, conflating, reorganizing, and inventing historical details, students of all ages flatten perspectives, overgeneralize from specific instances to entire groups, and ignore marginalized or minority perspectives while emphasizing the actions of dominant groups and individuals, (Afflerbach & VanSledright, 2001; Barca, Castro, & Amaral, 2010; Sant, Gonzales-Montfort, Santisteban Fernandez, Pages Blanch, & Freixa, 2015).

Children's literature often appears as an antidote to these tendencies, but the use of literature is more often recommended than researched. Historically, the rise of a literature specifically targeting child readers is a piece of a larger historical pattern in which contending cultural groups attempt to control the words and worlds available to different groups within and between societies (Bernstein, 2013; Willinsky, 1998). As a result, educators should be wary of overblown claims regarding the benevolent influence of literature on students' historical thinking. An engaging, well-written historical narrative may invite young readers to recognize and empathize with a protagonist's perspective without motivating critical analysis of that perspective. To the contrary, teaching with historical narratives too often requires little more of children than their passive attention. This is bad enough when the stories are historically accurate but especially disturbing when they are not. As we noted earlier, compelling stories can mask bad history, blind

students to more evidence-based interpretations, and reinforce misconceptions that can be very difficult to dislodge (Levstik, 1995). This is not an argument against the use of literature so much as a reminder of the need for teachers to select a variety of accurate, well-crafted narratives, use these narratives to motivate interest and spur historical inquiry, and, finally, to subject narratives to historical as well as literary analysis so that students make more evidence-based sense of human experience. Such an approach may not dislodge all historical misconceptions, but it does work against uncritical narrative-inspired empathy.

A final feature of historical empathy relates back to our earlier discussion of time on task. There is little evidence that students easily transfer what they learn in history classes to the larger civic arena (Aitkin & Sinnema, 2008; Brooks, 2014; Clark, 2004). Rather, the interrelation of learners' past life histories, learning situations, and wider social, economic, historical, and political contexts intervene (Hodkinson, Biesta, & James, 2008). At any moment one or more of these factors may be more or less influential—or obvious to an observer. It takes time for students to step back from an initial emotional response and willingly consider alternatives. The impact of national and vernacular histories remains the most examined in this regard, with increasing attention to how such histories influence students' understanding of historical agency.

Historical agency

Historical agency refers to the power of people to make and enact decisions in the context of the physical and cultural tools available in a particular time, place, and condition (Hodder, 2012). Agency is the essence of history, a driving force in human experience, and fundamental to any reasonable interpretation of the past, any useful definition of historical thinking, and any ability to achieve the humanistic and civic aims of history education (Barber, 2004). Misunderstanding the agency available in different situations not only generates misunderstandings regarding the risks people take in exercising available agency but can lead to unjustified conclusions, unwarranted civic action, and the rise of counter-histories that offer (often justified) alternatives to mainstream narratives.

Vernacular and national histories appear to influence the degree to which students understand their own and others' histories as stories of progress or decline, hope or discouragement, conflict or consensus, truth or lies (Arnot, Chege, & Wawire, 2012; Greenwalt, 2009; Obenchain, Bellows, Bernat, & Smith, 2013; Sant et al., 2015; Waldron & Pike, 2006; Wertsch, 1998). The degree of influence from early childhood through early adolescence remains unclear in specifics, but powerful in regard to students' learned stories of peoplehood, and somewhat hopeful in regard to students' willingness to engage in conversation about the agency available to people in different historical circumstances. Sant et al. (2015) provide an interesting example of this phenomenon in their study of how Catalan students represent a romantic-patriotic "nation without state" version of their history as they exit primary school at age 11–12 (p. 345). Two of the most interesting findings regard the degree to which students imagine their history as unconnected to the larger world and the degree to which vernacular histories (Bodnar, 1993), especially regarding traumatic events, influence their sense of their own civic agency. In contrast to students in England and the United States

who more often described their national history as one of progress, Catalan students saw theirs as more ambivalent, ending in trauma and decline with little room for active agency (Sant et al., 2015). Sant et al. (2015) also suggest that students who understand themselves as individuals facing overwhelming collective and institutional power are likely to disengage from civic life because they doubt the power of individual or collective agency to effect change in the face of deeply entrenched inequities.

Other studies suggest additional challenges in younger students' understanding of the impact of differential agency on how and why things change. Early childhood and elementary-age students often ascribe change to the agency of noteworthy individuals, tend to underestimate the scale of historic events, and rarely draw on long-term social, economic, or political factors to explain change (Heyking, 2004). Instead, they reference more immediate and personal interactions—a bullying queen or the imposition of unfair laws and the like (Barton, 1997).

Heyking (2004) as well as Sant and her colleagues (2015) argue that young students need carefully scaffolded experience in analyzing historical agency. Sant et al. (2015) suggest deconstructing vernacular as well as official histories, especially in regard to individuals and groups perceived as "other," but they also argue for contextualizing national and vernacular history as part of a world history with specific humanistic and civic purposes. They suggest instructional emphasis on the "achievement of a peaceful, just, and fully democratic world in which students are identified as the future" (p. 356). Opportunities for students to reflect on the purposes of their historical study as described by Heyking (2004) and Sant et al. (2015), however, are rare in the research literature. Indeed, *reflection* appears as a recommendation more often than as the subject of study when disciplined historical inquiry is under discussion.

Reflective Historical Inquiry

Teachers face an important challenge in regard to engaging students in disciplined historical inquiry with humanistic and civic aims. An empathetic response—especially an emotionally loaded empathetic response—may generate interest in a historical question, but at some point historical analysis requires that students step back and, as objectively as possible, examine contending perspectives that influenced people in the historical moment. The temptation is to stop there with a tidy and often lifeless bit of analysis. This is the point at which *reflective* historical inquiry comes to the fore. Reflective inquiry emphasizes opportunities for students to revisit sources, revise interpretations, and consider the implications of their study relative to the humanistic and civic aims of history education (Aiken & Sinnema, 2008; Barton & Levstik, 2004; Sant et al., 2015; Seixas & Morton, 2012).

Scholars differ significantly on the parameters of such reflection. Brush and Saye (2014) distinguish between researchers and theorists who establish learning goals based on the practices of academic historians (*disciplinary inquiry*) and those who base them on the practices of expert citizens (*disciplined civic inquiry* and *critical inquiry*), with advocates of a critical inquiry stance putting specific

emphasis on motivating students to transform power relationships. Those who lean toward a disciplinary inquiry perspective argue that mastery of disciplinary skills and concepts is an important aim in itself and implicitly provides students with important civic tools (Reisman, 2012). In contrast, those who base learning goals on what expert citizens do select content to illuminate the historical roots of current issues, design pedagogies that make civic connections explicit, and involve students in direct civic action (Hess & McAvoy, 2014; Thornton, 2005; Wade, 2007). Proponents of each perspective challenge traditional notions of expert citizenship to varying degrees and with varying degrees of emphasis on the potential for historical inquiry to help transform rather than reproduce existing power relationships (Cherryholmes, 2013; Segall, 2013; Zembylas & Kambani, 2012).

Although each position assumes some degree of civic education as part of history education, the impact of each approach on students' reflection about the civic aims of historical inquiry have not been thoroughly researched in early childhood, elementary, or early adolescent settings (Wade, 2007). In fact, reflection appears less as a feature of classroom instruction than as an artifact of research design. One value-added outcome of research on historical thinking may be that interviews with students prompt reflective thinking. Perhaps more disturbing, in countries where little history content is mandated in the earliest years of schooling, except as some form of reading in the content areas, where literacy rather than history aims and purposes are in play, students from early childhood through early adolescence may have few opportunities to reflect on the nature of *any* historical inquiry (Rock et al., 2006).

Conclusion

Research on teaching and learning history has foregrounded second-order concepts (analytical concepts) and paid relatively little heed to first-order concepts (disciplinary content). Our impression from reviewing more than 100 studies is that most often first-order concepts are treated as extraneous variables. As we noted in discussion of the exercise on the first shot fired at Lexington Green, we believe instructional exercises solely devoted to second-order concepts risk students not caring about the material—that is, they are presented with no invitation "to learn something more about themselves or their society" (Kownslar, 1974, p. 7). First-order concepts are more than interchangeable pieces of information needed for exploration of second-order concepts (which, of course, must have content about *something*).

We believe first-order concepts matter for children studying history for at least three reasons. First are developmental reasons. Research has shown that tasks about second-order concepts (e.g., time concepts) once thought to be beyond children's cognitive capacities prior to Piaget's stage of formal operations—in other words, the entire age span addressed in this chapter—were within their capabilities if tasks were crafted in certain ways. We hypothesize this is not always the same for children with first-order concepts. As the work of Brophy and Alleman (2006) suggests, concepts more within children's experience,

generally those to do with relatively tangible social and economic matters, do seem to be more understandable to them than formal political history. To put it another way, however learning tasks are crafted, children seem more capable of making inferences about foods consumed at the first Thanksgiving than analyzing the political precepts of the Mayflower Compact.

Second, the value of teaching and learning second-order concepts is compromised if children do not understand the first-order concepts involved. For example, both Barton (1997) and Brophy and Alleman (2006) note that children tend to employ inappropriate personal experience to interpret historical events when they don't understand the constituent concepts. Barton (1997) uses the example of children comparing the American struggle for independence from Britain to the familiar-to-them family squabble; fuller understanding would require they understand concepts such as taxation and representation. We suggest that instruction introduce patterns of human experience that students can investigate at different scales, sometimes beginning with students' own experiences and sometimes starting with more distant human experiences.

Third, Dewey (1966) appears to have been correct that historical concepts to do with and analogous to the problems of making a living are "more human, more democratic" than political history because they deal with "common" people (pp. 215–216). Based on our review of the research, we would add that concepts having to do with social justice appear to fall into the same category. Children's strong attachment to fairness motivates interest in patterns of injustice and attempts to rectify injustice. Children's understanding of equity (fairness as meeting needs) as opposed to equality (fairness as everyone gets the same regardless of need), however, is tenuous and requires careful teacher mediation (Brophy & Alleman, 2006, 2009; Ladson-Billings, 2000). These familiar human experiences, therefore, seem to warrant special consideration for the selection of first-order concepts for children to study in pluralistic democracies.

Research on second-order concepts—the tools that help students make sense of the content they encounter—suggests formulating an *emergent* rather than the prevailing *deficit* model of children's historical thinking. In what ways, for instance, is *family historical literacy* analogous to family literacy in reading and writing? How do the ways that parents, teachers, and community organizations introduce the past to children influence concept development? Researchers have identified predictable historical misconceptions in young children, but they also note that some misconceptions are more amenable to instruction than was once assumed. Conceptual change, however, appears to require time and repeated experiences with history in contexts more meaningful and developmentally appropriate than sporadic lessons on holidays, heroes, and national symbols. We agree with scholars who argue that disciplined and cross-disciplinary reflective inquiry provides a developmentally appropriate, civically sound, and practical way to provide that time and experience.

From a developmental perspective, history educators could organize inquiries around the cultural universals with which children already have some familiarity. As Brophy and Alleman (2009) argue, developing a broader, more connected, and better-articulated understanding of pattern and variety in universal aspects of human experience has a direct impact on children's making sense of their own

and others' everyday lives. From an emergent perspective, cultural universals provide a gateway for inquiry into the social phenomena that shape human lives, but they also motivate the use of second-order concepts that support such study. Alternately, studying pattern and variety in common living might also be organized around even broader themes including *haves and have-nots*; *the uses and abuses of power*; *science, technology and the environment*; and *expressing identity* (Dunn, 2016). In each case students start with something familiar, expand beyond the familiar into more distant times and places, and draw on other disciplines as well as history.

Disciplined and cross-disciplinary reflective inquiry also introduces children to important civic tools. Not only do students engage in systematic and replicable study of human experience, but the examination of the historical roots of current issues, ideas, and practices can be linked to civic decision making and allow students to put second-order concepts into immediate use. As we noted earlier, with careful teacher mediation, time, and practice, children's explanations of historical concepts became more explicit, more connected, and more accurate. Further, sharing interpretations with an audience beyond the teacher offers opportunities to discuss the significance of findings and to reflect on the civic implications of students' work. Without reflection, however, children may not recognize the significance of what they have learned, making it more likely that the cognitive gains they make will dissipate over time. This suggests that reflection on the humanistic and democratic aims of historical inquiry could strengthen history education's role as part of an apprenticeship in more equitable democratic living for students.

From a practical perspective, early childhood and elementary educators contend with a cramped curriculum tightly focused on reading, writing, mathematics, and, in some parts of the world, high-stakes testing. By early adolescence, students more often take courses in disciplinary history, but in the earlier years history loses to reading and mathematics just about every time. Given a powerful initiating question and a well-trained teacher, inquiry can move instruction away from a too-common tendency to practice literacy or mathematical skills on random historical texts or statistics and toward using literacy or mathematical skills to engage in more substantive historical study. These constraints, common to early childhood and elementary classrooms, suggest that cross-disciplinary inquiries may be practical, but more importantly they are also more authentic if our aims are civic. Because civic decision making often cuts across disciplinary boundaries, studies that do the same may better replicate real-world problem solving. The caveat, however, is that educators would need to know how to do this well and administrators would have to support substantive inquiry around questions that are important for citizens.

So far we have focused on *what* history might be appropriate for children and *how* students might best learn about the past, but it is equally important to attend to *why* they should learn history at all. We begin with the premise that history's purpose in pluralist democracies is twofold. First, historical study should help citizens ponder the nature of being human across time and space so that they act more humanely locally, nationally, and globally. Second, historical study should help citizens analyze the historical roots of current situations in order to prepare

them to negotiate with diverse others around an evolving common good. This would require thinking carefully about how citizens could actually use history. We reject the idea that historical content (first-order concepts) is interchangeable for civic purposes or that the intellectual tools associated with history (second-order concepts) are sufficient to meet history's humanities or civic goals.

With all of time and every place as a possibility and too little time at our disposal, educators have a moral responsibility to select content, themes, and questions carefully. With young children, the problems of common living in a pluralist democracy strike us as developmentally appropriate content. Such content taps into students' prior knowledge, suggests a variety of accessible sources, is scalable (local, national, global), and provides a reasonably sturdy cognitive framework for considering how, across time and place, humans go about solving persistent problems. As students approach adolescence they appear better able to handle more complex concepts (taxation and representation, for instance) than are appropriate with the youngest students, and, with careful scaffolding, they are more adept at identifying and writing about the historical impact of diverse perspectives (Downey, 1996). Again, however, these conceptual changes may not be terribly robust. VanSledright (2002) noted how easily the 10-year-olds he studied crafted rather simplistic explanations, often based on popular culture, for the historical struggles of settlers at Jamestown even after extensive work with historical sources.

After reviewing the research, we vacillate between optimism and pessimism. On the one hand, humanitarian and civic aims of history appear to be well within the grasp of children from early childhood through early adolescence. The content of history as common living, the tools of history that encourage attention to cause and consequence, perspective and agency, resonate with children's personal experiences and interest in fairness. On the other hand, early childhood and elementary history seems dead as the proverbial dodo, at least in North America, and too few researchers focus on emergent historical thinking. Further, the existing opportunity gaps faced by children in far too many schools make a mockery of any claims to democratic humanism as an aim of history education. In speaking about culture and power in the classroom, American scholar of urban education Asa Hilliard III urged that no stone go unturned or battle unfought to ensure that education not stunt the intellectual growth of children of color (cited in Delpit & Dowdy, 2008). We agree and argue that no students should be consigned to schools that narrow their opportunities to explore the histories they claim as their own or the histories of those with whom they share a common humanity.

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19

Teaching Controversial Historical Issues

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Were the crusades an attempt to defend Christians and Christian holy sites in the Middle East or an aggressive European invasion fueled by economic motives? Did the Industrial Revolution benefit or damage the masses of Europe? Who fired the opening shots in the 1775 battle of Lexington? Was Napoleon Bonaparte a hero or a villain? Who is responsible for the outbreak and devastation of World War I? Was the dropping of the atomic bomb on Hiroshima and Nagasaki justified? Was the Great Depression caused by structural flaws of the free market or by fraud and mass hysteria? Rather than handing students history as a fully cooked dried-out list of finite facts, quite a few topics in the history curriculum can be taught by engaging students in heated debates on controversial issues. In this chapter we will attempt to define and describe historical controversial issues as a pedagogical approach, and note its allures, challenges, and practical didactics.

What makes an issue controversial? When we speak of controversial issues we should note that we may uphold at least two overlapping notions. The first is Dearden's (1981) definition of a matter as a controversial issue if contrary views can be held about it while both views are rational. This emphasis on the rational aspect and its importance as the focal connection to the historical discipline is also shared by Foster (2013) in his review on historical controversial issues. Second, the definition of controversial may focus on the social dynamics of the issue, as one raising disputes between social groups advocating conflicting solutions based on their alternative values (Stradling, Noctor, & Baines, 1984). This dynamic escalates in socially or ethnically divided societies as historical controversial issues arouse strong emotions related to identity and loyalty (McCully, 2006; Zembylas & Kambani, 2012).

While these definitions overlap (a rational difference of opinion may be accompanied by strong emotions), they may be seen as contradictory (an exclusively identity-fueled controversy could hardly be seen as a rational dispute). However,

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whether the differences in views and their motivations are rational, ideological, or emotional, they serve as a setting for studying conflicting views and multiple perspectives on historical topics in the classroom. Thus, when discussing the teaching of controversial issues we refer to topics structured around a question with more than one answer and begging decision between the optional answers (at least at the outset). Learning tasks on such topics require students to form an opinion, discuss and contrast views, and attempt to convince each other, such as in the manner of a "town hall" meeting (Hess, 2009).

We refer to the adjective "controversial" as describing the way of teaching and learning using controversy, rather than just the status of a historical topic in academic or public opinion. The fact that a topic is disputed by historians, or that its inclusion in a textbook raises public controversy, does not suffice to make it an instance of controversial issues teaching. If teachers present only a single interpretation or perspective of the topic in class, learners will not engage in a controversy about it (although they might experience it as a difficult and emotive issue; Sheppard, 2010; Wrenn et al., 2007). Indeed, all too often historiographical innovations, revisions, and the controversies they raise do not reach the classroom (Goldberg & Gerwin, 2013). When a new interpretation replaces the old one in curriculum and in the classroom, it is usually in unequivocal anonymous authoritative narrative, evading the conflicting views surrounding it. If a topic already considered consensual in public or academic circles is taught in class through the deliberation of opposing perspectives then it may comprise a controversial issue.

Why Teach Controversial Issues?

Wide-scale studies show that authentic discussion in classrooms, let alone discussion of controversial issues, is quite rare (Nystrand, Wu, Gamoran, Zeiser, & Long, 2003). This state of affairs was also found in studies of history classes (Saye & Social Studies Inquiry Research Collaborative [SSIRC], 2013). It appears that most teachers evade contentious topics for various reasons: time and coverage pressures, fear of superiors' or students' reactions, and personal ambivalence (Evans, Avery, & Pederson, 1999). Furthermore, teachers frequently feel they lack the expertise both in terms of content knowledge and for discussion facilitation that are indeed necessary for teaching sensitive and controversial issues (Goldberg, 2017). When handled inexpertly, controversial issues teaching may lead to partial or biased knowledge, and to partisan views of history. It behooves us then to start by reasserting the claims for teaching controversial issues. Why risk (or bother) teaching them?

First, we should note that controversial issues may motivate learners and stimulate classes. Students are often most interested in the controversial topics teachers wish to evade (Levstik, 2000). Taking up a position in a debate rallies students to a cause as they make an effort to defend their stance. Social issues also may offer a chance to connect subject matter to students' lives, thus increasing its relevance.

However, the main claim for teaching controversial issues is its role in democratic education. As Hess (2009) contends, engaging students in deliberation of

social issues models participation in democratic society and serves as induction into the community of citizens. Surveys have shown that teaching centered on discussion of social issues predicts democratic participation attitudes (Kahne, Crow, & Lee, 2013). Discussing controversial issues also is supposed to enhance learners' ability to engage with opposing views while articulating their own reasoned opinion. This is a crucial competence (and disposition) in times of growing political polarization and socioeconomic segregation (Johnson & Johnson, 1988; McAvoy & Hess, 2013).

Furthermore, discussion of controversial issues leads to cognitive gains, especially in the realm of argumentation and reasoning (Reznitskaya et al., 2009). Contending with discussants' claims and assessing their validity improves individual reasoning. Discussants learn to see the connections between evidence and claims, and integrate counterarguments into their line of reasoning. Learners build more complex mental representations of an issue when they face contending perspectives (Felton & Herko, 2004). While some, or all, of these different reasons for teaching current controversial social issues may apply to historical controversial issues, we should note the unique aspects of applying the approach in the realm of history education.

Differences Between Social Issues and Historical Controversies

In what ways does teaching controversial issues in history differ from teaching social issues in civics or science and technology? First, these teaching practices have different aims. Unlike discussion of debated public affairs, engagement in historical controversy does not directly help learners join the community of citizens. However, it does serve as an induction into a community of practice (Lave & Wenger, 1991). Controversial issues and historical disputes expose learners to the nature of history as an interpretative discipline in which scholars contrast their reconstructions of the past (Foster, 2013). In order to support their claim in a historical debate, learners have to master disciplinary reasoning to understand conflicting interpretations and use evidence (Rouet, Britt, Mason, & Perfetti, 1996). Acquiring disciplinary norms of practice—as in the *Reading Like a Historian* curriculum of working with contradictory evidence (Reisman, 2012)—serves as a standard for taking part in debate, decision making, and evaluation.

Second, a fundamental difference is due to history's focus on the past. Unlike current social issues, which concern societies and learners' struggle to deliberate their present and future, in history students discuss time-bound events which have already happened (though their consequences may not be entirely resolved). History aims at discovering or determining what happened and why it happened or what led people to act as they did in a specific context. Arguing about how people should have acted might seem counterfactual and anachronistic. We should note that the confinement of controversy to the realm of the distant past and into disciplinary norms and discourse should not be seen only as a constraint. In some ways, these unique aspects of historical controversial issues actually may serve as an affordance, offering a wider space and freedom for discussion.

Discussing a historical event far removed in time or space can serve as a safer way to deal with an analogous or partly similar charged current issue (Foster, 2013). This may be especially true when current social conditions limit free discussion of controversial issues, as in authoritarian regimes (Baildon, Loh, Lim, İnanç, & Jaffar, 2013).

As in teaching social issues, focusing history teaching on topics arousing strong and diverse moral responses is likely to stimulate discussion (Barton, 2009; Levstik, 2000). Students draw implications to relevant current situations and position themselves within them, taking sides and defending their stance. In many historical controversies and controversial issues, the competing interpretations also tend to align along political affiliations, and that may motivate students to engage in discussion and inquiry. For those who fear polarization, it is worth noting that students apparently view the existence of at least some passionate partisans to be an essential driving force for a lively debate (Hand & Levinson, 2012). These motivational aspects of teaching controversial issues stem from connecting past to present, a relationship that stands at the root of historical significance attribution (Seixas, 2015). These issues harbor a strong potential to make history teaching more engaging and meaningful.

We mentioned above the motivational advantages of controversial issues. However, one cannot escape noting the risk they pose to historical thinking. The reader versed in history education theory must have moved uncomfortably in his or her chair, thinking of politicization of understanding and moralistic "presentism" biasing students' learning and reconstruction of agents' motives (Davis, Yeager, & Foster, 2001; Wineburg, 2001). We shall return to this point later because, unlike the case for teaching controversial issues in civics education, in history education teaching may represent a "walking on the edge." By historical disciplinary standards, "the past is a foreign country" and bringing it to bear on the present or bringing present values to bear on the past is smudging the lines between the two (Lowenthal, 2012). For example, some critics claim that debating the moral questions of the Holocaust in relation to current human rights issues is a practice unfit for the history classroom (Riley, Washington, & Humphries, 2010).

These considerations seem to support Foster's (2013) recommendation that whether an issue is genuinely open to rationally differing interpretations is a more important criterion for selecting issues for teaching than whether issues evoke emotionally or politically polarized responses. Therefore, teachers may do better to focus on controversial issues that are less charged and perhaps more remote, in order for students to engage in more rational and disciplinary discourse. We believe, however, that the attempt to dissociate the affective and political contentious aspects of controversy in order to save its rational disciplinary potential might be counter-effective. As Barton (2009) claims, evading the emotive and identity-relevant issues sterilizes history teaching, leaves student needs unanswered, and decreases motivation to learn. Referring to the emotive aspects of controversial issues (especially in societies divided by ethnicity, language, religion, or other social identities) is an essential step on the road to more rational engagement which might help make them more manageable (Barton & McCully, 2012).

Types of Controversy and Aspects of Historical Understanding

It is worth pointing to several types of historical controversies in which educators can engage their learners. While these ideal types are not mutually exclusive, they may differ as to the structuring of debate, to the disciplinary practices they elicit, and to their emotional and motivational impetus.

Re-acting (to) Debate

The first type of historical controversy we can engage learners in is a debate between historical agents in the past, such as an event in which members of a group or their representatives debated the path their community should follow on a contested issue. The classical cases for these are documented discussions of representative institutions such as the debate on the U.S. Declaration of Independence or the India's independence movement debating civil versus violent disobedience. However, dilemmas faced by far smaller groups also can serve as the basis for reenacted debates. This notion of teaching history through dilemmas and controversies guides the *Reacting to the Past* curriculum initiative for reenactment of major controversies in U.S. and world history (Carnes, 2011; Reacting Consortium, 2015). A parallel example is the Israeli Center for Educational Technology's series of videos and argumentative games featuring historical figures debating focal points in Jewish and general history. Learners argue for different standpoints on issues such as resistance to British mandate rule, the declaration of Israel's statehood, or the initiation of the French Revolution (Center for Educational Technology, 2015).

This type of controversy is closest to Hess's (2009) traditional town hall discussions. It fosters a parallel sense of human agency and understanding that decisions in history are not predetermined but a result of human deliberations. Although the event is part of the past and discussants cannot really change the choice taken by their country or movement, for pedagogical purposes teachers should leave learners to make their choice even if it turns out to be counterfactual. Thus, as long as they can support it rationally with reference to contemporary evidence or to commonly held worldviews, learners could debate whether dropping the nuclear bomb on a Japanese city is a better alternative than an amphibious invasion—alternate decisions that plausibly could have been made in that context (see Metzger, 2010b, for an example of such a lesson). In this sense, it is a mixture of a rational controversy, as in Dearden's (1981) definition, and a clash of values, per Stradling et al. (1984). Such an approach has been described in Olwell's (2014) reenactment of colonial New Yorkers' preparation for the provincial congress of 1775 and in Figart's (2000) computerized reenactment of the Second Continental Congress deliberations on declaring American independence, in which learners can essentially decide not to uphold the patriots' cause.

Joining Historians' Disputes

The second type of historical controversial issues teaching, and the more prominent in empirical studies of learning and cognition, is engaging students in historians' controversies (Rouet, Perfetti, Favart, & Marron, 1998; Wiley, Steffens,

Britt, & Griffin, 2014). A controversial issue of this type stems from an open historical question to which there exist varied (and at least at first sight) contradictory but essentially plausible answers or interpretations given by historians. This type of controversy seems closer to Dearden's (1981) rational dispute. The contentious questions may be causal, such as what was the main cause of the Great Depression, or demand perspective taking (e.g., tracking the main motivation prompting a leader to act). In many cases the questions behind such controversial issues ask for moral judgment, as when trying to evaluate whether a policy (such as Western "containment" of Communism) or an action (e.g., dropping the atomic bomb) was justified or not, or whether its beneficial outcomes outweigh its prices.

Some conflicting interpretations have led to publicized historical debates such as the German *Historikerstreit*, the Japanese assessment of war crimes, or the Israeli "New Historians" controversy about the righteousness of the Israeli Independence War. Other differing interpretations did not publicly clash, as they stemmed from different eras, regions, or theoretical perspectives, such as differing views of the Middle Ages as an era of regression and stagnation or as a dynamic remolding of Europe. Even if the differences did not lead to an actual debate between historians, for educational purposes it suffices that interpretations differ and contradict so as to set the ground for a debate between learners. To participate in debating this type of controversial issue, students must engage both with the conflicting interpretations and with some of the evidence on which they are based (Cooper & Chapman, 2009).

Clash of Memories and Ongoing Pasts

The most intense controversial issues could be seen as a third type of controversy. These stem not (or not exclusively) from the contradictions between historians' interpretations but from more current concerns. These may include concerns with the moral implications of accepting a perspective already quite consensual in disciplinary research but clashing with collective memory. Kubota (2014) describes such controversy arising from Japanese students' rejection of research about Japanese atrocities in World War II and Chinese-descended students' reaction to it. Similar controversies may arise from the emotional or moral responses to historical representations, monuments, or memorials.

As Seixas's (2015) model of historical thinking points out, the ethical dimension of historical thinking, which drives students' engagement in controversies, includes also the ethics of commemoration and representations of history. These controversies might be disputes about collective memory of heroes or eras once praised and currently increasingly viewed critically. An example of such a controversial issue is the image of European discoverers of the New World, which is debated (even at the high school and undergraduate level) by Europeans and Indigenous peoples or between conservatives and critical liberals (Bickford, 2013; Bingham, 1991). Similar controversies accompanying East Asian countries' commemoration of the Japanese role in World War II have begun to make their way into the educational scene (Bu, 2015; Fukuoka, 2013; Kubota, 2014). The controversy in some cases may refer to the right way to remember or commemorate a

leader or an event, as Waters and Russell (2013) suggest in reference to national monuments. Controversy also may arise from students' affiliation or identity. Students may support or resist historical agents or topics according to their in-group's current relations with the historical group or issue (Goldberg, Schwarz, & Porat, 2008).

This type of controversial issues, which is sometimes related to the historical topic being a "difficult history," may be seen from a strict cognitive-disciplinary perspective as straying away from rational discourse implied by Dearden's (1981) definition and centering solely on clashing values and emotions (Stradling et al., 1984). We believe that dealing with controversial issues is an amalgam of the cognitive, social-political, and affective aspects of students' learning (Zembylas & Kambani, 2012). Therefore in teaching controversy, there is place also for the "fusion of horizons" (Vessey, 2009) in which learners' interpretation of the past is driven by current concerns. However, since in Gadamer's (1989) notion of "fusion" learners' preconceptions are used to make the past speak for those in the present, there is a risk that these preconceptions and common present understandings of a term or concept will govern the stance learners take in a controversy. We believe that this type of presentist emotional-ethical responses to controversial issues has led to their common negative connotation. For many history educators "controversial" is taken as a cautionary adjective, describing the content (as dangerous or unreliable and therefore better avoided). However, if educators would view the term controversial as describing the process of engaging with a topic through contrasting perspectives, it may actually make it less threatening.

Controversial Issues as Engagement with Multiperspectivity

Moving from the conceptualization of controversial issues to their implementation in the classroom, we now look at ways to structure teaching so as to expose and engage students with the multiperspectivity and dialogicity of history. Foster (2013) suggests a seven-stage approach to structuring materials and activities in teaching controversial issues. Teachers should begin with choosing a topic, based on consideration of teachers' context and capacities, with reference both to the degree to which their community allows and promotes debate and their acquaintance with diverse historical interpretations. Teachers should, as the second step, pose a focal question, which preferably will call for making a clear choice between options (at least until they trigger more complex integrations). The next two phases include acquiring or transmitting background knowledge and presenting learners with conflicting pieces of evidence. The fifth phase, which is most crucial in disciplinary terms, is the evaluation of evidence and its classification in reference to possible stances about the controversial issue (i.e., does it support or contradict each standpoint?). Following this engagement with evidence, learners prepare their standpoint for debate, whether predetermined by the teacher or formulated by the learner. The last phase is that of whole-class debate, concluded by individual reflection on the chosen stance and possibly its reformulation.

We should note that, unlike the town hall method of teaching controversial social issues (Hess, 2009), where discussants aim to achieve a clear-cut joint decision on policy, in Foster's (2013) approach historical controversial issues could essentially be left undecided. However, for motivational and argumentative considerations it is preferable to instruct learners to convince each other and attempt to arrive at a decision. Starting a debate on a controversial issue with the prompt "everyone is entitled to their own opinion" may lead to lower interaction. In such a case, discussants may simply present views side by side, rather than attempting to assess evidence backing the other's argument, refute it, and question its interpretation. Such a relaxed perception of historical interpretation as mere opinions may reflect a relativistic epistemic stance (Kuhn, 2001). In contexts where a relativistic view of knowledge is common, as apparently may be the case at college-level education in some communities (Kuhn, 1991), or where politeness norms decree evasion of conflict (Misco, 2013), directing students to criticize each other's arguments may be essential for controversy and debate to take place.

Handling Hot Potatoes: Containing Controversy

The idea of handling controversy as a public dispute aimed at winning over the other side or gaining an audience's support for your standpoint has received some criticism. This approach may lead to escalation and disregard for the other side's claims, especially in identity-relevant controversies (Abu-Hamdan & Khader, 2014; Bu, 2015; Foster, 2013). In attempt to structure historical controversies in which students' identities lead to strong rallying effects (such as Chinese students' discussion of Mao's reign), Carrico (2014) suggests a "pedagogy of disengagement" in which the teacher should model a process of self-distancing, sharing with the students his or her personal involvement with the topic, and pointing to the way to overcome it.

Johnson and Johnson (1988) in their Structured Academic Controversy approach suggest a somewhat different approach to mitigate disregard for the other. They opt for working at the level of two opposing dyads and instructing each to repeat the opponents' claims prior to their own to assure mutual understanding and acknowledgment. It is worth noting that a similar process was suggested for dealing with clashing collective historical narratives in intergroup conflict. In the description of work with the dual narrative textbook produced by a group of Palestinian and Jewish teachers, Eid (2010) and Bar-On and Adwan (2006) show how Jewish and Arab learners are prompted to present the other's narrative (in the first person) prior to taking their own stance on a disputed issue.

Kolikant and Pollack (2015) show how virtual spaces can serve as an arena for learners to contain intergroup dispute over controversial issues. Jewish and Arab students' online collaborative writing of Wikipedia entries about contested historical topics (such as right to the land or violent conflicts) enabled them to deliberate disagreement and make use of conflicting sources. This move to the virtual realm as the space for discussing controversy is also advocated by Larson (2005). It is worth noting that the above approaches to mitigating the possible emotional overflow of controversial issues suggest structuring the controversy in

small group or dyadic interactions in place of town hall/full class discussions. This position is backed by argumentation studies, pointing to the pronounced knowledge co-construction in peer-to-peer interaction (Asterhan & Schwarz, 2009; Goldberg, Schwarz, & Porat, 2011).

Besides virtual spaces, museums have also been proposed as safe places for students to explore controversial issues and views contrary to their own for themselves without the immediate risk of live encounter (Rounds, 2006). Museums also offer the opportunity to examine and reconstruct experiences of historical figures that held opposite positions in particular historical events or developments. In a study by Savenije (2016), students investigated the lives of persons from opposing groups in the Netherlands during World War II (for example, collaborators and people in the Resistance) in an exhibition in the Dutch museum *Museon*. After gathering information about two different persons by investigating personal objects and sources donated by these people, the students wrote an imaginary dialogue that could have occurred at the exhibition's opening in 2004 when the exhibition donors met for the first time and exchanged stories about their war experiences. The activity enabled students to engage with two opposing perspectives and challenged them to bring these views together in a dialogue.

Gathering the Pieces: Compiling a Controversy

Another factor that may hinder teachers from teaching controversial issues through deliberation of multiple perspectives is the labor-intensive preparation of materials and lack of acquaintance with historical controversies. Not all history teachers themselves have studied history at a level in which they engaged in historical debate, and they may not all have easy access to the various historical publications containing the conflicting interpretations. In such a case, teachers can attempt to rely on compilations of text structured for the explicit purpose of teaching controversial issues found mostly at the postsecondary education level and adapt the sources to their needs (for example the series *Clashing Views*; Mitchell & Mitchell, 2010). The way such a book could be used by history teachers has been described by Nokes (2013). Another option is to draw from multiperspective curricula prepared for work in contexts of intergroup conflict and reconciliation, such as Northern Ireland's critical inquiry curriculum (King, 2009).

Another possible option is to use a single historian's work as a source for diverse and contrasting evidence, which learners can use to form divergent interpretations (see Metzger, 2010b, on the events leading to the use of the atomic bomb, for a suggestion on breaking a historian's text into separate arguments). This would mean deconstructing that historian's synthesis of multicausal explanation of a complex phenomenon, such as the Great Depression or the eruption of World War I, into separate causes and invite learners to advocate for specific causes/factors/actors as most influential. While this curricular design may not directly expose the learners to different historians' interpretations, it has the advantage of showing them competing stances or conclusions about the topic. Thus, the teacher can guard against dichotomous thinking about only one possible true cause or interpretation which often can accompany debate.

Using such a text compilation, an alternative to the town hall debate could be to structure the controversy as a mock trial. The diverse pieces of evidence and their interpretation by a historian are offered as pieces of a puzzle waiting to be assembled. The students are assigned roles as advocates or prosecutors using the pieces of evidence to support a "verdict" for competing "suspects." Goldberg et al. (2008) have used this approach for the highly controversial issue of Jewish terrorism (e.g., the 1946 King David hotel bombing), dissecting conflicting historians' interpretations into pieces of evidence and asking learners to debate and reach a verdict as to who is responsible for the assault. Similar work has been done over the question of who initiated the 1775 Battle of Lexington (Reisman, 2012, 2015).

Contexts and Challenges for Controversial Issues Teaching

In recent years researchers in the field of teaching controversial issues have emphasized the importance of taking the context into consideration: where, when, and how controversial issues are taught (Misco, 2012). An increasing body of research has studied the teaching of controversial issues in diverse contexts all over the world as well as the ways in which particular issues come to be regarded as controversial. In the remainder of the chapter, we will first focus on the context of the global society to discuss the meeting of conflicting narratives in divided societies and emerging democracies and the internalization of curriculum. Second, we will focus on the context of diverse classrooms. Lastly, we will consider teaching controversy regarding the significance of the past in the context of museums and heritage institutions.

Conflicting Narratives in Divided Societies and Emerging Democracies

As globalization increases along with notions of global responsibility, there is evidence of growing efforts to disseminate controversial issues teaching into new contexts. In some of these contexts, such as divided societies and emerging democracies, the teaching of controversial issues poses greater challenges on teachers than elsewhere. Studies in divided societies such as Cyprus (Zembylas & Kambani, 2012), Northern Ireland (King, 2009; McCully, 2006), Israel (Eid, 2010; Eini-ElHadaf, 2011), and Rwanda (Freedman, Weinstein, Murphy, & Longman, 2008) have shown that, although teachers and students were willing to teach and learn about controversial issues, students had difficulty fully engaging with perspectives other than their own.

Despite the above-mentioned difficulties, however, researchers, curriculum developers, and teachers in divided societies and emerging democracies have explored the possibilities of teaching controversial issues. By discussing multiple perspectives on topics that are considered to be less "hot," students are made familiar with the idea of the existence of two or more contrary views on a particular historical event or development. The well-known work by Barton and

McCully (2005, 2012) has investigated the teaching of history in Northern Ireland. On the one hand, the authors demonstrate that many students' critical inquiry was clearly influenced by family and community perspectives. On the other hand, awareness of the use of history for partisan political purposes helped students distance themselves from a one-sided history and integrate perspectives of the other into their narrative.

A study by Kolikant and Pollack (2015) mentioned above, shows how the virtual realm can serve as safe intermediate space for handling controversial intergroup histories in a divided multicultural society. Jewish and Arab students in Israel, who are normally segregated by school and language, were able to challenge each other's and historians' perspectives in a computer-supported collaborative learning environment. The students read historical interpretations and primary documents regarding events related to the Israeli–Palestinian conflict, such as the issuance of the Churchill White Paper on Palestine in 1922 by Britain. They then debated the meaning of these texts prior to jointly writing their own interpretation of that event using an online Wiki. This "glocal" intervention (using location-independent tools to address local problems) proved to be successful in promoting more nuanced epistemological conceptions. It also proved useful in helping learners handle seemingly irreconcilable differences and nonconvergent learning. Goldberg and Ron (2014) have shown that a critical inquiry curriculum (proposed by a liberal Israeli minister of education but unfortunately censored by the consequent right-wing minister) calling on learners to juxtapose Israeli and Palestinian historians' interpretations promoted a more collaborative intergroup deliberation of a highly controversial issue. The critical historical stance, and to some degree the identity the learners developed as members of the disciplinary community, furnished a safer space for disagreement and convergence.

Does Internationalizing Mean Internalizing Controversy?

In the above cases, multiple-perspective curricula and controversial issues teaching were initiated by local educators to bridge political and institutionalized chasms between learners from conflicting groups. Beyond such local initiatives, we see a growing trend of international collaboration for the creation of multiple-perspectives curricula that could potentially serve as basis for teaching controversial intergroup issues. In cooperation with local initiators, the European Association of History Educators (EUROCLIO) attempts to stimulate the teaching of multiple perspectives on national history in countries like Bulgaria (Yanchev et al., 2010), former Yugoslavia (Brouwer & Westerling, 2009; Dujkovic-Blagojevic, 2014), Latvia (Gundare, 2000, 2002), and Georgia (Kusheva et al., 2011; Smilansky, 2012). Recently, the association has become active outside Europe as well: in Korea (van der Leeuw-Roord & Mulder, 2011), North Africa, and the Middle East (Stegers, 2012). Another institution that has been investing in supporting European history teachers to discuss controversy in the classroom is the Council of Europe, by providing teacher guidelines, organizing seminars, and developing teaching materials (Council of Europe – OSCE/ODIHR, 2014; Low-Beer, 2000; Šehić et al., 2005).

Reports on these projects indicate that, in many cases, history education in the target countries has benefited from the joint efforts. However, looking more closely, a generally affirmative external review by Maier (2011) of a newly written Georgian history textbook (Kusheva et al., 2011) draws attention to the "too positive" representation of intercultural relations in Georgia in the 20th century. Such overly harmonious historical representations do not necessary play into the hands of teachers who wish to foster debate. It is worth noting that a recent analysis (Korostelina & Lässig, 2013) of several joint history textbook projects shows that the actual enactment of controversial issues teaching is not as widespread as the growth of curricular initiatives.

These mixed outcomes should raise questions as to the internationalization of controversial issues teaching. The idea of teaching controversial topics, citizenship, and critical thinking travels the world, but to what extent can we be sure that every society will gain from this approach or in the same way? Indeed, in Western democracies largely free of warfare on their soil for at least the past 70 years, teaching controversial issues is often seen as an integral part of citizenship education, social studies education, or history education. In non-Western countries, many of which have fresher experiences of invasion or civil conflict and have different types of regimes, the goals of citizenship education or moral education are often different. These goals include, for example, promoting loyalty to the nation, preserving distinct cultural and racial traditions and values, and maintaining cultural, religious, and racial harmony (Ho, 2010). These goals may not always be easily aligned with the teaching of controversial issues. Furthermore, authoritarian political systems may not facilitate the open class climate that is a necessary condition for the teaching of controversial issues, as has been studied by Misco (2011) in Beijing, China, and by Abu-Hamdan and Khader (2014) in Jordan. This should be taken into consideration even in Western democracies—definitely in the US—where political polarization makes public debate more contentious than ever and discussing a controversial issue may become quite a challenge (Camicia, 2008; Chikoko, Gilmour, Harber, & Serf, 2011; Macdonald, 2013).

In general, studies of teaching controversial issues in authoritarian states as well as emerging democracies, such as those by Misco (2012) in South Korea and Latvia, by Mhlauli (2012) in Botswana, and by Abens (2011) and Gundare (2002) in Latvia, show a similar picture. Teachers are convinced of the benefits of discussing controversies in the classroom and express the will to do so. However, their teaching practice is not always in congruence with their beliefs. Teachers are afraid of emotional responses of students when teaching about controversial issues and fear negative reactions from within the school but also from the wider community, including parents or the government. Many teachers feel unready didactically and emotionally to facilitate discussion of controversial issues.

Baildon and Sim (2009) argue that part of the difficulty of teaching controversial issues is the framing of this teaching approach within the context of global citizenship education. To participate in the global society as responsible citizens is a paradox in itself as globalization accentuates local social injustice or erodes local culture (Macdonald, 2013). Furthermore, the idea of the global citizen is controversial itself in parts of the world where it is equated with Americanization

and uniformization (Adetunji, Bamidele, Awodele, & Ojediran, 2013; Myers, 2006; Rapoport, 2009). Thus, engagement with conflicting perspectives and debating local historical issues could be felt as a plot to erode national narratives making way for a unified Westernized one.

Similar fears about the threat of global citizenship to national values and the nation itself exist within the US as well (Myers, 2006). Indeed, on a constitutional, juridical, and ethical level the concept of global citizenship raises questions with regard to the community one belongs to as a citizen (Fonte, 2002; Parekh, 2003). When preparing for teaching controversial issues, history educators should deliberate in advance whether they wish to challenge strongly held local beliefs and whether their final objective is to align learners with an internationally accepted narrative. Several authors argue for the need to search for a "third space" between the global and the local to sustain the possibility of diversity while preparing students for dealing with the interdependency of cultures and societies in the globalized world (e.g., Gough, 1999; Wang, 2006). However, it is unclear whether this third space aligns with the law of contradiction (i.e., the classical notion that contradictory statements cannot both be true in the same sense at the same time) inherent to debate on controversial issues.

Teaching Controversies in Diverse Classrooms

While it could be debated whether controversial historical issues teaching should be internationalized and exported, there is no doubt that international movement of people has imported new controversies into the classroom. Globalization during the past three decades has led to an intensification of contact between people all over the world. Migration and the Internet have, among other things, increased possibilities to exchange knowledge, values, and ideas between people of diverse cultural backgrounds. Diverse classrooms would seem to be a natural context for the meeting of conflicting narratives. Historical topics that may not be considered to be controversial in academia or the public realm become controversial in such classrooms because of the diversity of students and the narratives that they bring with them.

For example, the Holocaust and World War II are topics that have been taught in Western European schools, museums, and heritage institutions for over three decades as a consensual narrative focused on the various victimized groups, often stimulating empathy and identification through personal stories and emotional experiences (Hondius, 2010; Ribbens & Captain, 2011; Somers, 2014). This narrative has been called into question in recent years as classrooms diversified to contain more students of non-European and especially Muslim background. Holocaust denial theories and allegations of Israeli instrumentalization of the Holocaust have circulated in the countries of origin of many non-European immigrants. Reaching Europe through media and social networks, these views are taken up by students posing a unique challenge to Holocaust education in European urban classrooms (Shnabel, Nadler, & Dovidio, 2014).

Studies by Ensel and Stremmelaar (2013) in diverse classrooms in Amsterdam and by Jikeli (2013) among Muslim adolescents in Berlin, Paris, and London have shown that many doubted or even denied the consensual factual narrative about

the Holocaust. Furthermore, they also challenged the traumatic uniqueness of the Holocaust, equating it with the suffering of Palestinians (Jikeli, 2013). While we might advocate attuning to diverse students' challenges by initiating controversial issues teaching, we believe that doing so for some topics that become controversial due to classroom diversification would be a risky and even morally questionable approach. As students debate historical research about the Holocaust and demand to contrast it with their views, teachers encounter a troubling choice. Normally, a teacher embracing controversial issues teaching should celebrate students' demand to engage in controversy and give a stage to conflicting views. Denying their demands may alienate them. However, does that justify giving equal stand to well-based research and to bogus claims whose mere inclusion in debate inflates their status? As Kubota (2014) asked over a parallel case in an Asian context, should "looking at two sides" include genocide denial?

Our answer is essentially negative. Holocaust denial is both unacademic and unethical (and illegal in some countries). Unlike historical interpretation of specific issues in Holocaust research (such as whether the so-called Final Solution was fully preplanned or unfolded contingently), the occurrence of the Holocaust should not be debated. However, educators coping with this challenge suggest that, as learners' reaction stems from a sense of marginalization and moral outrage at current affairs, affirmation of their identity and experience is a precondition to engagement in study (Gryglewski, 2010). Some scholars have suggested bringing in the varied perspectives on WWII of people who became involved in it because they lived in colonies of the countries fighting the war (who, for example, were forced to join the army), thereby touching on learners' countries of origin (Hondius, 2010; van Vree & van der Laarse, 2009). Educators at the memorial and educational site *House of the Wannsee Conference* encouraged students from Palestinian and Turkish backgrounds to study the students' family biographies, the related history of the Palestinian or Turkish people, and the history of the Holocaust (Gryglewski, 2010) to affirm their identity and motivate engagement with topics. Following affirmation, teachers could engage students in debate about the historical significance of the Holocaust for them.

Historical Significance in Contested Sites

The concept of historical significance raises the question of why, when, and by whom a particular historical event, person, or phenomenon is or was considered to be significant. To answer this question, students would need to build up an argument and use particular criteria for historical significance to do so (van Drie, van Boxtel, & Stam, 2014). Several authors have categorized the ways in which the past is attributed historical significance (Cercadillo, 2001; Lévesque, 2008; Metzger, 2010a; Seixas & Morton, 2013). Historians, history teachers, and students can disagree about the historical significance of a particular historical event or they may attribute significance to it in different ways in interplay with their identities (Peck, 2010). Transforming a clash of emotional reactions to history into a reasoned controversy about historical significance may be applicable to other cases of conflicting narratives and memories (the third type of controversy as described earlier).

Debate on collective memory and commemoration is potentially a promising approach to elaborating on students' diverse identities. Some progress in this direction was made through using museums and heritage sites as the space for contending stances to memory. While museums and heritage have been associated with a static and authoritative representation of a dominant national historical narrative, many researchers in the field of museum studies, heritage studies, and more recently history education have proposed different approaches to museums and heritage that emphasize critical inquiry and multiperspectivity (e.g., Gosselin, 2011; Hamer, 2005; Harcourt, Fountain, & Sheehan, 2011; Seixas & Clark, 2004; Smith, 2006; Sørensen & Carman, 2009).

Seixas and Clark (2004), focusing on a series of murals depicting the origins of civilization in British Columbia in the Legislative Building's central rotunda, provide a good example. They analyzed students' responses to whether the paintings should be retained or removed to resolve the controversy about the way First Nations (Indigenous) people were portrayed. The students were able to form reasoned arguments about these controversial historical representations and the authors stress the importance of such exercises in a time in which the meaning of the past and the right way to commemorate it are often subject to debate. In a case study by Savenije, van Boxtel, and Grever (2014), students visited the Dutch National Slavery Monument that is part of a controversy in the public realm and academia about the amount of time and attention devoted to the topic of slavery in Dutch education and, in particular, the perspective taken in the dominant historical narrative. It is claimed that this White perspective trivializes the role of the Dutch Republic in the history of slavery, that it does not acknowledge the gravity of the slavery issue and its legacy in the current society, and that the voices and perspectives of enslaved people do not receive enough attention (Oostindie, 2009). The students in this case study were invited to discover what the monument meant to them by examining the monument and choosing a particular position to stand near the monument. They were asked to explain their choice to each other. This exercise enabled students to reflect on the relationship between one's attribution of significance to the monument and one's identity.

Explicitly deliberating why particular historical remnants and narratives should be designated as "national heritage" may enable critical reflection on what heritage is and why particular remnants are preserved and by whom (Grever, de Bruijn, & van Boxtel, 2012; Seixas & Clark, 2004). For example, sharing with students the decision-making process behind creating a museum exhibit may further their understanding of it (Gosselin, 2011) as part of the constructed, multiple-perspective nature of history and heritage (van Drie & van Boxtel, 2008).

Conclusion

This chapter presented the various ways in which history educators may capitalize on controversial historical issues teaching to engage learners with the multiperspectivity and dialectical nature of history. Be it a re-acting of a historical controversy, an engagement in historians' debate, or a clash of narratives leading

to memory and significance controversy, controversial issues vitalize discussion and engage students in disciplinary and personal ways. Acknowledging both the motivating and stimulating powers of the method and the risk of emotional excess accompanying it, we suggest that reasoned debate can transform such risks. As societies interact and transnational collaboration shapes history education, multiperspective curricula are developed and opportunities for controversial history teaching occur, at times, ahead of local readiness for controversy. We note the potential of globalization and diversification of classrooms to problematize consensual topics and raise controversy in the classroom. While this may threaten some teachers, it would embolden others. Engaging students in controversy will remain crucial if learners are to understand both the multi-voicedness of history and its value for critical deliberation.

Recent political events all over the Western world seems to have shed doubt on the possibility of rational debate and the deliberation of controversial issues. A rise of populist conservative governments from Eastern Europe to the US is accompanied by leaders' avowals to maintain national honor and avoid controversial perspectives on national history. Such an outlook may enhance teachers' tendency to self-censor controversies. However, in a climate of "post truth" and mudslinging, of political polarization and delegitimization, it behooves us as educators to uphold a sane, rational, and evidence-based alternative. We believe that the Internet, which is at the heart of some of the inflammatory and irrational dynamics of confrontational politics, could serve as a matrix for discussions of controversial issues in a structured and substantive manner. We also foresee promising trajectories for further research on controversy in transnational arenas of learning, and in intergroup deliberations of the past. In both these realms, evolving technologies for structuring argumentation and intelligent tutoring may scaffold teachers in their struggle to master expertise for teaching controversial issues, an expertise evidently absent currently from social studies teachers' training. But even if the field will enjoy the support of both policymakers and technology developers, there will be no substitute for teachers' willingness and courage to broach hotbeds of controversy.

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Section V

Historical Literacies: Texts, Media, and Social Spaces

20

Reading in History Education: Text, Sources, and Evidence

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From our vantage point in the early 21st century, scholars of history education appear to be approaching general consensus about the nature of historical reading. In curricular documents across the world, we see growing emphasis on the centrality of sources and a largely shared understanding that historical texts should be treated as evidence in formulating arguments about the past (e.g., Finnish National Board of Education, 2003; New Zealand Ministry of Education, 2010; also see Seixas & Morton, 2013, for Canada's Historical Thinking Project). As we discuss in the second half of this chapter, for over three decades history education researchers have studied how novices read and process historical sources and have explored classroom interventions that support disciplinary engagement. This body of research rests on normative assumptions about how historians read texts and how disciplinary reading practices allow them to generate interpretations and knowledge claims about the past.

It would be false, however, to presume that these assumptions have gone unchallenged. Precisely because the process of historical reading is inextricably linked to the generation of truth claims about the past, and because the nature of truth will forever be contested, the purpose and nature of historical reading itself has faced repeated challenges. At the root of these challenges lies disagreement about whether it is possible to recover the past by examining historical evidence. Although such debates have roiled the historical profession for nearly a century, they have not appeared in the research on history education or in the curricular materials on historical reading and writing available to teachers. It is this distance between disciplinary debates about the purposes and processes of historical reading, on the one hand, and the efforts that education researchers have undertaken to bring such processes into the classroom, on the other, that we will explore in this chapter.

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What is Historical Reading?

Our contemporary understanding of the role of historical sources in history has its roots in the 19th century, when German historians rejected the Enlightenment tendency to write history in the service of larger moral lessons (Novick, 1988). This shift in the nature of historical thinking, initially associated with Leopold von Ranke, was tied to the careful scrutiny of historical sources. The historian's task was to be comprehensive in collecting all the sources related to a particular event and vigilant in interrogating and interpreting them. Ranke urged historians to present history *wie es eigntlich gewesen*, which can be translated "as it really was."

In his discussion of Ranke, Peter Novick (1988) argued that American historians fundamentally misinterpreted Ranke, selectively importing his emphasis on historical sources to bolster a young profession that yearned for the legitimacy associated with scientific empiricism. But Ranke was far from an empiricist; instead, he sought to intuit the essence of the past. As Novick noted,

> The young historian who in the 1970s proposed a "psychedelic" approach to history—altered states of consciousness as a means for historians to project themselves back onto the past—was thus in some respects truer to the essence of Ranke's approach than empiricists who never lifted their eyes from the documents. (p. 28)

Nonetheless, the prospect that historians might engage in scientific work—as long as they had sufficient patience and the right tools—was enormously attractive to American historians at the turn of the century.

Historians' pursuit of and belief in objectivity has waxed and waned over the past century. As these have changed, so too has our understanding of the nature of historical reading. Even before World War I, and accelerating in the years following, historians and philosophers of history questioned the possibility of "scientific" history. In his posthumously published *The Idea of History*, English historian and philosopher R. G. Collingwood (1946) wrote that history was

> a science, but a science of a special kind. It is a science whose business is to study events not accessible to our observation, and to study these events inferentially, arguing to them from something else which is accessible to our observation, and which the historian calls 'evidence' for the events in which he is interested. (pp. 251–252)

If, as Collingwood argued, the historian substituted the analysis of historical evidence for scientific observation, the nature of historical reading could remain within the realm of objectivity.

Collingwood's portrait of scientific historical analysis of evidence rested on several key principles. First, he critiqued the antiquated approach of "scissors and paste" history, in which the historian went in search of statements about a topic and, upon finding them, excerpted them and incorporated them into their writing. This was not history at all but rather "the transshipment of ready-made information from one mind into another" (p. 264). Instead, the scientific historian

must be more discerning and circumspect, and inquire into the author's credibility and probity before accepting the truth of a given statement (pp. 258–259). Moreover, the scientific historian reads with a question in mind and in doing so can transform traces of the past into evidence that might answer the question. To the historian who claims

> there is nothing in such-and-such an author about such-and-such a subject," the [scientific] historian will reply "Oh, isn't there? Do you not see that in this passage about a totally different matter it is implied that the author took such-and-such a view of the subject about which you say his text contains nothing? (p. 270)

In short, the scientific historian treats statements as evidence, "not as true and false accounts of the facts of which they profess to be accounts" (p. 275) but as clues that may shed light on a much broader range of historical topics.

How does the historian actually construct historical understanding? Here Collingwood (1946) underscored the challenge of achieving any sort of objective historical truth: Because the only way a historian can determine the thinking of historical actors is to process them himself, ultimately "all history … is the re-enactment of past thought in the historian's own mind" (p. 215). Moreover, the criterion Collingwood used to assess understanding necessarily came from his *a priori* imagination of the event or topic:

> Suetonius tells me that Nero at one time intended to evacuate Britain. I reject his statement, not because any better authority flatly contradicts it, for of course none does; but because my reconstruction of Nero's policy based on Tacitus will not allow me to think that Suetonius is right. *And if I am told that this is merely to say that I prefer Tacitus to Suetonius, I confess that I do:* but I do so just because I find myself able to incorporate what Tacitus tells me into a coherent and continuous picture of my own, and cannot do this for Suetonius. (p. 245, emphasis in original)

Concerned that his reader would equate the work of the historian with that of the novelist, Collingwood quickly asserted that "where they do differ is that the historian's picture is meant to be true," and therefore the historian must ground his claims in time, space, and evidence (p. 246). But, the door to subjectivity and relativism had cracked open.

This was precisely E. H. Carr's (1961) concern in *What Is History?* While he agreed with Collingwood's fundamental premise that the historian must "achieve some kind of contact with the mind of those about whom he is writing" (p. 27), Carr worried that the logical end of such a premise was "total skepticism" (p. 30). Not only did Collingwood open the door to an infinite multiplicity of historical interpretations, but he also created the danger of unbridled presentism. If historians view history through the lens of the present, won't they "maintain that the criterion of a right interpretation is its suitability to some present purpose?" (Carr, 1961, p. 31). Certainly, there must be some other standard for the appropriateness or validity of a historical interpretation. Carr's question has continued to nettle the historical profession for the past half century.

Carr did not completely deny the historian's subjectivity. Comparing facts to fish, Carr (1961) conceded that what a historian catches depends "mainly on what part of the ocean he chooses to fish in and what tackle he chooses to use— these two factors being, of course, determined by the kind of fish he wants to catch" (p. 26). At the same time, Carr believed that the historian could mitigate his subjectivity by remaining reflective about its influence. He insisted that history "is a continuous process of interaction between the historian and his facts, an unending dialogue between the present and the past," and therefore a good historian has "a capacity to rise above the limited vision of his own situation in society and in history [and] to recognize the extent of his involvement in that situation, to recognize, that is to say, the impossibility of total objectivity" (p. 123). In other words, history remains possible as long as the historian, while reading and writing, remains cognizant of his or her own historical subjectivity.

If Collingwood and Carr cracked open the door to historical subjectivity, postmodernism blew it open. According to Hayden White, whose 1973 tome *Metahistory* seemed to cast a fatal blow to the disciplinary work of historical analysis, the past was "irredeemably absent and accessible only by way of spoors, fragments, and traces" (White, 2009, para. 4). It could never be recovered or represented accurately. For this reason, postmodernists saw little difference between historical texts that were written *in* the past and the narratives that historians have written *about* the past. As postmodernist Alun Munslow (1997) explained, "the *reality* of the past is the written report, rather than the past *as it actually was*" (p. 3, emphasis in original). The actual study of history should focus on the work in which historians engage as they write about the past. Richard Evans (1999), writing quite literally *In Defense of History*, rejected this categorical conflation of primary and secondary sources and accused postmodernists of abolishing a core principle underlying modern historical scholarship.

With the benefit of hindsight, we can see that postmodernism did not spell the end of history. Historians still distinguish between primary and secondary sources and still attempt to construct explanations and arguments about the past based on sources. Evans (1999) insisted that historical documents "do have an integrity of their own; they do indeed 'speak for themselves,'" and historians can elicit meaning from them not only by "re-thinking them in [their] own mind," as Collingwood suggested, but also by comparing them with other documents (p. 100). Even Dominick LaCapra (1980), who embraced a "'performative' notion of reading and interpretation," warned that "it is necessary to emphasize the status of interpretation as an activity that cannot be reduced to mere subjectivity.... [The historian] must attend to the facts, especially when they test and contest his own convictions and desires" (p. 274). Evans (1999), of course, agreed and closed with the following vow: "I will look humbly at the past and say, despite them all: It really happened, and we really can, if we are very scrupulous and careful and self-critical, find out how it did and reach some tenable conclusions about what it all meant" (p. 220).

Where has this brief journey through the history of historical thought left us? We might say that we exist at a moment of uneasy consensus, believing that we can ask questions of evidence and use our minds to reconstruct the past presented in historical sources while remaining vigilant about the ways that our historical

subjectivity shapes our interpretations. As we turn to the relatively young field of research on historical reading, we will apply this discussion as a lens through which to explore how education researchers have operationalized historical reading and the extent to which their conceptualizations align with broader epistemological considerations.

Historical Reading Into Classrooms: Origins

The first efforts to pilot and research processes of historical reading with young people in classroom contexts emerged in the US and the UK in the 1960s and 1970s. Prior to this period, any sources included in history instruction served illustrative, rather than evidentiary, purposes. In their 1899 report to the American Historical Association proposing a course of history study, the Committee of Seven argued that the use of sources demanded "special and distinct treatment"—yet in the same breath they found themselves "unable to approve a method of teaching, sometimes called the 'source method'" (McLaughlin et al., 1899, p. 101). Save a handful of carefully selected illustrative or seminal texts, students would best learn history through textbook narratives because only "where a large mass of material can be examined and sifted [can] historians and teachers safely rely for their information entirely on sources" (p. 102). Likewise, in the UK, under the "Great Tradition" approach in which students learned an "agreed set of historical facts" (Lee, 2014, p. 171), primary sources were used only "occasionally to stimulate curiosity, interest, even awe, or to illustrate particular points" (Dickinson, Gard, & Lee, 1978, p. 2).

A number of related and distinct forces led history educators in both countries to embrace a disciplinary approach that sought to engage students in knowledge construction, primarily through encounters with historical sources. Jerome Bruner's (1960) *Process of Education* inspired educators on both sides of the Atlantic to design inquiry curriculum organized around the discipline's central concepts (Booth, 1994; Bruner, 1960; Dow, 1991; Wilschut, 2010). In the US, the political climate helped matters: Sputnik launched a stream of federal funding for education that resulted in innovative reforms in math and science that eventually made their way into the social studies (Bruner, 1983; Dow, 1991). In the UK, history educators were influenced theoretically by Paul Hirst's (1973) account of disciplines as distinct forms of knowledge, as well as by Piagetian notions of developmental progressions in conceptual understanding.

The U.S. effort, which came to be called the New Social Studies, was predominantly a curriculum design initiative. Scholars from a range of disciplines expressed renewed interest in the problems of curriculum and devoted themselves to developing classroom materials that reflected disciplinarily authentic modes of inquiry. By 1967, over 50 national curriculum projects were building curriculum materials in geography, history, economics, public policy issues, and world affairs (Hertzberg, 1981). Two centers—one at Amherst College in Massachusetts and one at Carnegie-Mellon University in Pennsylvania—collaborated with local schools and teachers to develop history curriculum using primary sources. The Amherst History Project (AHP) began publishing curriculum

in 1963 that centered on student investigations of open-ended historical questions. Each unit included multiple, conflicting primary sources that engaged students in the core epistemological debates that animate the discipline (Brown, 1996; Hertzberg, 1981).

Despite some efforts on the part of the AHP leaders, no research was conducted on student learning, and only cursory conclusions were drawn about the effectiveness of the curriculum units. These were based entirely on self-reports collected from participating teachers. In their final report to the U.S. Office of Education, the AHP leaders lamented their inability to measure individual student growth on a number of parameters—"knowledge, skills, sensitivity, and 'wisdom'" —due to the absence of appropriate measures (Committee on the Study of History, 1969, p. 9). In 1969, they developed their own pre- and post-tests for five of the curricular units, each with a transfer component, but apparently this resulted in their "amassing enormous quantities of data which were highly suggestive but which [they] lacked the staff time to process adequately" (p. 12).

The Committee's report included an appendix that reported anecdotally on how teachers and students responded to the various components and features of the curricular units. The authors noted that certain features seemed to preclude student engagement—for example, if the documents were too long, too abstract, or too complex, or if the unit included an editorial overview that conveyed an interpretation that students adopted as their own. Most important—and in contrast to the ways historical reading is addressed in subsequent research—the authors concluded that units failed or succeeded depending on the relevance of the topic presented:

> The units that were most effective, that "hit home," involved the students with moral questions, with irresolvable value questions, with questions that helped them to understand better how society functions and how man—man they can empathise with—grapples with problems, dilemmas, tragedies, and ultimately, with life. It matters little what the problem is … as long as the students see it as being important to them because it will help them to arrive at a better understanding of themselves as human beings and of the society in which they function. (p. 10)

In other words, the purpose of historical reading was less to understand the past and more to draw lessons from the past that could be applied to the present. To be sure, many of the units engaged students in critical source analysis, yet the structure and larger purpose of the units was anchored in the present.

The concurrent curricular effort in the UK differed from the New Social Studies in that research was a core component of the project. Founded at the University of Leeds in 1973, the School's Council History Project 13–16 (SCHP) grew to embrace a quarter of all British high schools. Researchers conducted an extensive evaluation study that examined student development of historical thinking; they ultimately proposed a progressive model in which students develop an increasing capacity to distinguish between historical narratives and the past, and ultimately recognize that the former involve contextualized historical explanations (Shemilt, 1983).

Although SCHP did not research historical reading specifically, a simultaneous research project originating in London did. Influenced by W. H. Burston, who believed that "history education would never prosper unless it took learning and cognitive development seriously," a group of researchers including Peter Lee, Alaric Dickinson, and Rosalyn Ashby conducted decades of research that explored student understanding of second-order concepts in history—for example, cause and effect, continuity and change, and use of evidence (Lee, 2014, p. 173). At the core of this broad research agenda lay a deep interest in historical empathy. For example, Dickinson and Lee (1984) observed the discussion of three high school girls (age 16–17) as they made sense of documents about the Anglo-Saxon practice of oath-helping and the ordeal. Over the course of the discussion, the girls moved from regarding the practice of oath-helping as simply superstitious and "stupid" to considering the role of religion for Anglo-Saxons. In other words, the girls eventually began to consider the historical context of the documents and the worldview of the Anglo-Saxons who engaged in these practices. The researchers saw this developmental progression as one that occurs in fits and starts: "personal experience, the explicit and implicit evidence available, imagination or its absence, and the possibilities for fruitful interaction, all have an impact on the kind of thinking children display in tackling the strange behaviour and institutions of past societies" (p. 145). The researchers' focus on the role of imagination in opening the door to historical empathy revealed the influence of Collingwood's ideas about reenactment and historical imagination (Lee, 2014; Retz, 2015).

Cognitive Research on Historical Reading

The initial inroads into the cognition of historical reading begun in the UK gained steam in the US in the 1990s as scholars applied the tools of cognitive research to the problem space of historical reasoning. Having developed more robust models for the cognitive processes of both experts and novices around historical reading, researchers also turned to investigating ways to support student reading and thinking about the past in actual classrooms. This cognitive research has identified which aspects of historical reading might be most useful to teach students as well as which instructional methods might support such learning.

Expert Historical Reading

Building on expert-novice studies conducted in other subject areas (e.g., Chi, Feltovich, & Glaser, 1981; Schoenfeld, 1985), researchers of historical reading launched their inquiry by studying how experts processed historical texts. The most comprehensive research on how historians read was conducted by Sam Wineburg in a series of think-aloud studies with university-based historians. In the most groundbreaking, an expert-novice study of historians and students enrolled in Advanced Placement (AP) United States history courses, Wineburg (1991a, 1991b) identified three heuristics upon which historians relied while

analyzing a set of documents: *sourcing*, or attending to the author, date, audience, and purpose for writing; *contextualizing*, or placing a document in time and place, taking care to consider the circumstances surrounding an event and how those could have influenced the document; and *corroborating*, or comparing accounts and evidence across multiple sources. In a later study, Wineburg (1998) explored how two historians—one an expert on Abraham Lincoln and the Civil War and one not—analyzed a set of documents in order to better understand Lincoln's views on race. Although the historian with expertise in the Civil War brought ample contextual knowledge to the task, the historian with less expertise in this area still successfully formulated an argument about Lincoln's views. According to Wineburg, this historian engaged in "a prolonged exercise in the specification of ignorance in which he made a careful accounting of the knowledge he would need before he could reach judgment" (p. 332). Leinhardt and Young (1996) also investigated how historians read texts with which they had varying degrees of familiarity and found that, across texts, historians engaged in *identifying* (which included sourcing, contextualizing, corroborating, and classifying the document) and *interpreting*, or deriving meaning from the document using relevant content knowledge and careful textual and historical reading. Two decades later, Shanahan, Shanahan, and Misischia (2011) confirmed these findings by comparing historians not to high school students but rather to accomplished mathematicians and chemists. They found that historians were more likely to source, contextualize, and corroborate documents. Historians viewed critical analysis as essential in determining which sources could be considered reliable evidence in light of the questions at hand.

In less frequently cited work, Wineburg (1994) proposed a model to reflect the cognitive representations of historians as they read multiple documents intertextually. He argued that historical reading requires a unique model that recognizes that historical texts are themselves linguistic representations of a past that is fundamentally irretrievable. For each document, the historian constructs three representations: *the representation of the text* (rT), which involves parsing and propositional integration but also includes an understanding of language as slippery and historically contextualized; the *representation of the event* (rE), which reflects the text's presentation of the event, including its historical actors and their motivations; and the *representation of the subtext* (rSB), which allows the reader to make judgments by "reconstruct[ing] authorial intentions and purposes, and [determining] the guiding assumptions, biases, and convictions that frame historical texts" (p. 92). The larger Event Model (as opposed to the text-specific rE) grows and shifts as the reader encounters additional documents and modifies his or her synoptic judgment of the event.

Wineburg drew heavily from Collingwood to explain the historian's analytic process. Faced with "fragmented and partial" historical sources that are "invariably tainted by their limited perspective," Wineburg (1994) asserted, as Collingwood did, that historians construct understandings and representations of events by "using a store of personal knowledge, experiences, and creative mental processes" (p. 98). Especially in constructing the representation of the event (rE), historians must get "inside" the event by chronicling those things that are not explicitly stated in the document: "the motivations, intentions, hopes, beliefs,

and fears of historical agents" (pp. 99–100). Still, according to Wineburg, which parts of documents are believed, rejected, or tabled as historians assemble their arguments is not happenstance but the result of a carefully coordinated process of several levels of skilled reading, analysis, and reflection.

Novice Historical Reading

Wineburg's work also helped generate a portrait of how novices approach historical reading. Instead of treating the source and context of a document as intimately connected to its argument and constructing a narrative through evaluation and corroboration, the high school students in his study treated texts "as vehicles for conveying information" and searched for the most authoritative source to relate the story of what actually happened (Wineburg, 1991b, p. 83). Even when the gap between experts and novices narrows, distinct differences between those with historical training and those without it have emerged. Rouet, Favart, Britt, and Perfetti (1997) compared how graduate students in history and graduate students in psychology read historical documents about a topic with which both groups were unfamiliar. The psychology students primarily read in order to accomplish factual understanding of the subject under study, focusing on the content of the documents. History students, by contrast, prioritized "interpretations and evidence" (p. 102), recognizing the strengths and limitations of different kinds of sources and adjusting their evaluations and arguments accordingly.

Additional cognitive research focused on secondary grades and college students has generally confirmed the findings about novices described above. Adolescents and young adults without training in historical reading struggled to spontaneously source, contextualize, or corroborate (Stahl, Hynd, Britton, McNish, & Bosquet, 1996). They resolved inconsistences in texts by trusting the facts in sources they read first and tended to take on the viewpoint of the source they read most recently (Perfetti, Britt, Rouet, Georgi, & Mason, 1994). They ranked textbooks as the most trustworthy documents, equating them with primary sources in many cases (Rouet, Britt, Mason, & Perfetti, 1996).

Another branch of research on students' historical reading has been devoted to asking questions about and promoting student engagement with textbook accounts. McKeown and Beck (1993) examined how four fifth-grade American history textbooks presented the American Revolution and investigated what students were likely to learn from them. The textbooks, the authors found, assumed too much background knowledge from students and were not constructed in a way that helped students make connections between historical events. Based on interviews conducted with students after they had read portions of the textbook, McKeown and Beck concluded that students were actively trying to make sense of the text but not experiencing success. Instead, students often "take from the text whatever information is most accessible and form it into retelling" (p. 9). Other researchers have similarly criticized the content, format, and structure of history textbooks (e.g., Adbou, 2016; Paxton, 1999; Schleppegrell, Achugar, & Oteiza, 2004) and suggested making textbooks more engaging and accessible through reforms such as inserting more active authorial voices, clarifying causal

connections, and avoiding unfounded assumptions about the background knowledge students bring (e.g., Beck, McKeown, Sinatra, & Loxterman, 1991; McKeown & Beck, 1993; Paxton, 1999).

Additional research on students' reading of secondary sources has identified ways to make these texts more accessible, engaging, and ultimately useful for students and teachers. Working with high school students, Paxton (2002) compared the comprehension of students who read an excerpt from a history textbook with an anonymous author to the comprehension of students who read a text with a more visible author whose point of view and authorial presence was made explicit. Students in the visible author condition made more comments while thinking aloud during their reading of the initial text as well as of primary sources that followed. These students interacted with the author, reflected on the author's perspective, and actively engaged with content. Wolfe and Goldman (2005) showed that, given appropriately designed texts, students could read and integrate information from multiple sources into a historical account. Sixth graders thought aloud as they read two historical accounts that contained contradictory explanations for the fall of Rome but were otherwise structurally identical. Most students (80%) recognized the difference in the arguments made by the two accounts, and the questions students generated focused on probing why the authors had offered those explanations. Finally, Logtenberg, van Boxtel, and van Hout-Wolters (2011) compared the questions students generated and the interest they expressed in the Industrial Revolution after reading one of three introductory texts about the topic: a personal narrative, an argumentative/controversial text, or an expository passage. Students who read the different types of texts did not vary in the number of questions they generated after reading, but the types of questions differed, with students who read narrative and controversial texts asking more comparative and emotive questions and expressing greater interest in the topic.

Although these studies suggest promising routes for promoting students' interest in and understanding of historical narratives, they fall short in important ways. First, by focusing on comprehension and engagement, they do not investigate ways to engage students in disciplinary historical reading. Additionally, these researchers have generated the texts themselves in order to manipulate their features experimentally. But, historical study ultimately involves analyzing and evaluating historical traces and accounts that exist in the documentary record.

Interventions in Evaluating Historical Sources

A body of cognitive studies tested interventions that would support students in evaluating and reasoning across multiple historical sources. Stahl et al. (1996) found effects for varying writing tasks on how students engaged with historical texts. Students in AP United States history courses were asked to read and annotate several documents, ranging from historians' accounts to newspaper op-eds and memoirs. Half of students were told to read the documents in order to prepare a description of the topic, while the others were instructed to form an opinion. Although the authors found little variation in students' notes based on

which writing task they were assigned (most focused on extracting and summarizing details from each document), differences emerged in the final writing assignment. Students tasked with writing a description included many details and paraphrased evidence from the documents, while the opinion writers produced evaluative statements with little grounding in the documents. Although most students included details from multiple texts, few showed evidence of sourcing, contextualizing, or corroborating. Wiley and Voss (1999) also found effects based on the type of writing task to which students were assigned, with students told to write an argumentative essay based on web sources writing more original and integrated essays than students told to write narratives, explanations, or summaries.

Few recent studies have focused on contextualization. In one study, van Boxtel and van Drie (2012) demonstrated the importance of historical knowledge, echoing findings on expert reading. Pairs of secondary students were given three contextualization problems in which they had to determine what a document was about and in which historical time period it originated. The most successful students had a "rich associative network of historical knowledge organized around key concepts" (p. 129) on which they relied in order to accurately contextualize. In a subsequent experiment, the authors demonstrated that students taught historical knowledge, as well as students taught knowledge *and* a strategy for contextualization, performed significantly better on a contextualization post-test than students who were only taught the strategy. Baron (2016) found that embedding reliable visual cues was an effective strategy for stimulating participants' prior knowledge and prompting them to situate documents in the correct historical era. The intervention was especially effective for participants with lower prior knowledge.

Finally, studies have tested the role that technology can play in helping students become more sophisticated historical readers. Britt and Aglinskas (2002) designed a computer application to support students in learning to source, contextualize, and corroborate historical documents. Designed around the model of cognitive apprenticeship, the application was built to explicitly teach, coach, and support students in developing historical reading skills. Students who completed the intervention modules scored higher on a sourcing post-test than students in traditional classroom or textbook-module conditions. Other studies have investigated the effects of technological interventions on students' reading of historical texts, including embedded textual annotations (Lee & Calandra, 2004) and different ways of graphically representing historical accounts (Mendez & Montanero, 2008). However, it is unclear how these interventions support disciplinary historical reading.

It is important to note that in all these studies, historical reading has been shorn of its relation to historical understanding, or in Wineburg's (1994) terms, the reader's construction of the Event Model. Rather, these studies capture historical reading in decontextualized sourcing or contextualization post-tests or by counting the number of times students cite or evaluate discrete documents. Although such measures befit the lab, they fall short of reflecting the complex work of historical reading, in which the reader, conscious of his or her subjectivity, spins a "web of imaginative construction" in an effort to reconstruct the past

(Collingwood, 1946, p. 242). The question we pose now is whether researchers enriched their conceptualizations of historical reading as historical thinking research moved back into the classroom.

Historical Reading in Classrooms: Research in the 21st Century

Much of the contemporary classroom-based research on historical reading has attempted to translate and simulate authentic disciplinary practices in the context of K-12 classrooms. These studies draw from three decades of cognitive research on the assumptions and behaviors students bring to their engagement with historical texts. Historical reading and writing are deeply intertwined in many of these studies, with reading and analysis of texts used to shape writing and writing used as a way to scaffold, extend, and measure the quality of historical reading and thinking.

Small-scale qualitative classroom studies have investigated possibilities for embedding historical reading instruction in classrooms at all levels. These studies are valuable in their illustrations of the challenges inherent in bringing disciplinary practices into classroom instruction. At the same time, the findings, often limited by self-report data from small samples, do not permit generalizable inferences. VanSledright (2002a) taught a fifth-grade American history course for four months, helping students to become "detectives of history" by teaching them a process of document-based historical inquiry: finding and checking evidence and sources, weighing their reliability and importance, and eventually constructing an argument about the historical event (pp. 1096–1097). Think-aloud interviews with eight students at the beginning and end of the course showed improvements in students' abilities to apply historical analysis skills such as sourcing and cross-checking and to construct evidence-based interpretations and arguments about the past (VanSledright, 2002b). Swan, Hofer, and Locascio (2008) investigated whether such positive results were possible with a less time-intensive teaching intervention. Students conducted three historical investigations through a specially designed program called *The Historical Scene Investigation*. Each investigation lasted two days and was completed in the context of a social studies class that otherwise did not teach historical reading or thinking skills. Results were mixed. Some students did, with support, show evidence of historical reading, such as considering the source of a document or crafting a narrative out of discordant accounts, but at least half of students in each investigation did not show evidence of developing these ways of thinking and reading, most likely due to the limited duration of the intervention in the midst of otherwise traditional history instruction.

Although Bain's (2006) ninth-grade students were quite adept at critically reading primary and secondary sources, weighing different interpretations in light of available evidence, and crafting historical arguments, he was frustrated by their unwillingness to question the textbook in the same way they did other sources. Students worked with dozens of sources in the process of constructing their own written arguments about the Black Death in the 1300s; once these were

written, Bain asked them to consider their textbook's account of the same historical phenomenon. Ultimately, students had to argue whether they were satisfied with the representation in the textbook. Pushed to "consider the textbook as *an* account rather than *the* account," Bain (2006) wrote, students were finally willing to apply their historical reading strategies to critically analyze the textbook (p. 2098, emphasis in original).

Several larger-scale curricular interventions highlight the potential for classroom-based historical reading interventions focused on instructional strategies. De La Paz (2005) examined the effect of direct instruction on eighth-grade students' historical writing and historical reasoning. The experimental group, which included students with documented learning disabilities, received 12 days of historical reasoning instruction on sourcing and corroboration as well as 10 days of writing instruction. The instructional intervention for both the historical reasoning strategies and the writing strategies involved teacher modeling, guided practice, and eventual fading of instructional supports. De La Paz found significant gains in writing for the treatment group across measures—length, persuasiveness, arguments, and accuracy—from pre-test to post-test. The study found less robust evidence for student growth in historical reading. Few students used historical reasoning strategies in planning their post-essays, and De La Paz did not measure the degree of student historical reasoning in the actual student essays. In follow-up interviews with a sample of students, De La Paz found marginal gains in students' understanding of what constitutes evidence and in their recognition of the need for corroboration. In a follow-up study with 160 11th-grade students, De La Paz and Felton (2010) found similar results: Students in an experimental condition (in which they were taught historical reasoning strategies) wrote longer essays and were twice as likely to earn the top writing quality score compared to students in a control group. Students in both conditions wrote the same number of claims, but students in the experimental group included more rebuttals and cited more documents in their essays.

Continuing their investigation of the effects of explicit reading and writing instruction on student essay writing, De La Paz and her colleagues (2014, 2017) designed and trained teachers to implement 18 days of document-based history instruction (three lessons spent on six different historical topics). Each three-day segment included time spent reading, evaluating, and discussing sources, as well as planning and writing about them. Scaffolds were developed to support both reading and writing, with reading supports focused on the heuristics of sourcing, contextualizing, and corroborating. In post-test essays written by students, the authors found effects for the treatment in the quality of students' historical arguments (which included elements of historical reasoning, including perspective recognition and contextualization) and essay length, but not the holistic quality score given to each essay. Students with teachers who implemented the curriculum with greater fidelity tended to see larger gains. Again, the findings used student writing as a proxy to capture gains in student reading, and the researchers did not explore what students understood about each of the topics under investigation in the intervention.

Nokes, Dole, and Hacker (2007) designed a study to measure the effects of two curricular interventions—use of multiple texts and explicit teaching of

heuristics—on student historical understanding. The study was a 2 × 2 nested design (historical content or heuristics crossed with textbook or multiple documents) with over 200 11th-grade students. The intervention consisted of 10 one-hour lessons embedded in a 15-day unit on the 1920s and 1930s in the US. The researchers found that those students who used multiple documents to learn historical content (rather than heuristics) performed the best on their content measure—40 multiple-choice questions—and the students who used multiple documents to study heuristics outperformed the remaining two conditions. Furthermore, the students who used multiple documents to study heuristics scored significantly higher on sourcing and corroboration in their post-essays than any of the other conditions. The researchers found virtually no evidence of student use of contextualization.

Reisman (2012a, 2012b) designed a curriculum intervention for students in upper-secondary grades and examined its effect on several measures, including student reading. In a six-month quasi-experiment in five urban high schools, students in a *Reading Like a Historian* condition (cf. Wineburg, Martin, & Monte-Sano, 2011) outperformed their counterparts on four measures: historical reading, general reasoning, factual recall, and generic reading comprehension. Reisman's intervention was longer but also less structured than the other studies. Teachers were free to choose from 83 lesson plans covering a range of topics in the American history survey, as long as the approach constituted at least 50% of instructional time per week. Each of these *document-based lessons* comprised three distinct segments: (1) background knowledge; (2) historical inquiry with modified primary sources; and (3) whole-class discussion. Like the studies of historical writing instruction, the intervention centered on certain instructional techniques, including cognitive apprenticeship and explicit strategy instruction. By explicitly teaching students the strategies of disciplinary reading, the intervention sought to redefine the reading process and shift the students' orientation toward historical knowledge.

These intervention studies share certain characteristics. First, all were comprised of document sets that reflect conflicting perspectives or accounts that students were expected to reconcile. Second, each of these interventions included some form of explicit strategy instruction, including modeling, guided practice, and fading, that centered on the historical reading strategies of sourcing, contextualizing, and corroborating. For example, teachers in Nokes, Dole, and Hacker's (2007) study sequenced instruction on historical reading by first introducing a heuristic in discussion with students, then modeling how to use the heuristic in historical reading, and finally giving students a chance to practice. De La Paz et al. (2014) developed mnemonics for reading and writing strategy sequences (e.g., IREAD, H2W); they first modeled these explicitly for students and then gradually encouraged their independent application. The *Reading Like a Historian* curricular intervention (Reisman, 2012a, 2012b) also relied on explicit strategy instruction of historical reading skills, though each lesson in the intervention included additional components as well: relevant content knowledge that stood as a precondition for document-based inquiry, and whole-class discussion theorized to help students build content knowledge and disciplinary understandings.

Third, although these interventions used a variety of instructional scaffolds, each ultimately prompted students to consider whether the documents they read were reliable or trustworthy, given the central question at hand. Some interventions asked these questions explicitly. For example, after considering the author and understanding and critiquing the source, the graphic organizer that De La Paz and Felton (2010) designed to guide students through reading historical documents directed students to "Decide what is open to interpretation" and "Decide what is most reliable and credible" (p. 181). Even if questions like these were not explicitly addressed in the curriculum, they appeared as expectations for historical reading in the researcher's analysis. In order to be coded as the highest level (four) on VanSledright's (2002b) continuum of students' reading strategies, students needed to "make inter-textual evaluations of the sources' reliability, subtext, and agent intention as a means of constructing a refined, evidence-based interpretation of the event" (p. 139).

One question to emerge from these intervention studies is whether they were designed to promote authentic disciplinary engagement with texts. The answer is complicated. Most of the interventions described above included authentic historical documents and most prompted students to use those texts to reason through legitimate disciplinary questions about the past. On the other hand, none of the studies captured the *quality* of historical understanding, or the Event Model in Wineburg's (1994) terminology, that students constructed while reading across multiple texts. Indeed, most of the interventions attempted to capture historical reading in student writing, a distal proxy given the well-documented challenges that students experience with writing. Although Reisman (2012a) employed reading measures, these only captured general reading comprehension and the application of historical readings skills to content that did not appear in the intervention. Follow-up qualitative analysis of student reasoning with texts in whole-class discussion (Reisman, 2015) suggested that students had limited opportunities to construct robust historical understandings of the topics on the curriculum. It might be fair to conclude that the research base, as it stands, reflects only a partial representation of what historians do when they read.

Discussion: Lost in Translation?

Whether we begin with an epistemology of historical reading as developed by philosophers of history over the course of a century, or with the cognitive models developed to represent the reasoning of expert historians, we must recognize that the way historical reading has been operationalized in many of the studies discussed above is quite limited. Peter Seixas (2015) recently highlighted aspects of this misalignment. There are several areas, Seixas contended, in which Anglophone educators should be more open to learning from their counterparts in German history education: first, their understanding and use of the concept of historical consciousness; second, their terminology regarding historical sources; and relatedly, their development of *triftigkeit,* or plausibility, to evaluate historical accounts.

Anglophone educators, Seixas (2015) argued, have sloppily categorized the kinds of sources on which historians rely. As a result, the approaches to analyzing sources taught to students are, at times, reductive and misleading. Educators in English-speaking countries have not carefully specified or defined the words they use to describe historical sources, instead using evidence, source, historical text, primary source, and account often to refer to the same things. Seixas located the origin of this problem in the British SCHP of the 1970s (see above), arguing that Shemilt "used 'evidence', 'historical sources' and 'primary sources' interchangeably (and without explanation), sowing the seeds of confusion for a generation of history educators" (p. 4). Research since the SCHP has further complicated the issue.

In addition to creating confusion over the kinds of sources to which researchers are referring, Seixas (2015) argued that undisciplined use of terminology has led to researchers treating all forms of historical evidence as if they were testimony or accounts, insisting that students question a document's reliability in all cases. This approach is reductive, Seixas argued, and misrepresents the range of texts that can be treated as historical evidence. He called for, at base, a distinction between *traces* ("fragmentary traces of the past") and *accounts* ("contemporary constructions of the past shaped by present concerns and purposes") (p. 6). When historians read accounts, their purposes for reading and the historical questions they ask usually align with the questions that mattered to the author. The same cannot be said of traces. Traces were created at the time period under study, usually not with the purpose of answering the questions historians ask. For example, Patrice Lumumba's speech during Congo's Independence Day celebrations on June 30, 1960, would be considered a trace if one were investigating reasons for his assassination. It was (clearly) not created with the purpose of explaining why Lumumba was assassinated six months later, but historians could use the speech to build an argument in response to this question. Due to this discrepancy between the purpose of the trace and the purpose of the historian, Seixas argued that it is inappropriate to question the reliability of traces. When educators fail to differentiate between traces and accounts and the sort of analysis that should accompany each, they mislead students. The result is that students have been prompted to question the "reliability" of sources in cases when doing so is neither necessary nor appropriate.

Seixas (2015) also argued that Anglophone researchers have much to benefit from incorporating the lens of historical consciousness into their conceptualizations of history education. Missing from the work on historical thinking in the Anglophone world is an understanding of how young people *use* the past to make sense of the present. By foregrounding the interaction between past and present in the process of historical sense-making, the construct of historical consciousness might allow researchers to approximate more closely the disciplinary nature of historical reading. Historical consciousness, Seixas argues, "is an achievement of cultures—or individuals—who comprehend the historicity of their own circumstances, the mutability of their identities and the contingency of their traditions" (p. 3). It is precisely this awareness of one's historical subjectivity that might allow the scrupulous historical reader to "reach some tenable conclusions about what it all meant," as Evans (1999) concluded (p. 220).

Although we agree with Seixas's analysis, we remain uncertain about the way forward. Certainly, the field would benefit from terminological consistency and clarity. We also agree that the research on historical reading in the Anglophone world has not adequately engaged with the question of historical consciousness specifically, or the role of the present more generally, in shaping how students interpret historical texts. Those studies that have explored students' lived experience and their perceptions of the past have not, as a rule, studied how these experiences influence students' historical *reading*. A handful of studies discussed in Monte-Sano and Reisman's (2016) review have explored how certain interventions with historical texts shifted students' incoming perceptions about contentious historical events (e.g., Goldberg, Schwarz, & Porat, 2008, 2011; Kolikant & Pollack, 2009). These studies, however, represent the exception.

At the same time, we disagree with Seixas about why the field has evolved as it has. Seixas (2015) suggested that contemporary Anglophone history educators, like their predecessors at the turn of the century, have attempted to transplant German ideas "into alien soil" without paying attention to the "cultural and philosophical landscape" in which they originated (p. 2). That may be so, although we have encountered little evidence indicating that cognitive researchers have been aware of the literature in Germany on history didactics. Rather, we believe contemporary researchers of history education have trained their gaze on *classroom instruction*, and the extent to which such instruction can offer novices meaningful encounters with historical texts, despite the myriad structural challenges that limit such opportunities in schools.

This practical and applied agenda has distorted the disciplinary nature of the enterprise in ways that extend beyond the confusion between accounts and traces. For example, many of the curricular interventions described above assume that disciplinary historical reading occurs when students read two to three modified documents and attempt to answer a question posed by the curriculum developers. In some cases, these questions may not be considered legitimate historiographic questions because they prompt students to judge historical actors rather than understand them (in a sense treating events in the past like civic decisions in the present). Even in those cases where students confront questions that historians actually debate, they have only a fraction of the resources that they would need to construct a compelling response. This flattening of the scope and nature of disciplinary work is also evident in the way researchers have simplified the heuristics that Wineburg (1991a, 1991b) initially observed in historians. However, such simplifications should be expected given the challenges of designing classroom interventions that must be conveyed in a handful of professional development workshops.

The question, of course, is whether instructional interventions might be designed that better approximate the disciplinary nature of historical reading. We believe so. First, as has been written elsewhere (cf. Monte-Sano & Reisman, 2016), we agree with Seixas's call for greater attention to the ways that students' lived experiences shape their engagement with the past. Second, we believe that greater clarity could be achieved if researchers were to ground themselves more deeply in epistemological debates on historical knowledge so that they may be

purposeful and deliberate in their choices about how to represent and simulate historical reading in classroom contexts. For example, given that researchers have experienced a degree of success in prompting students to question a source's reliability, and at the same time considering that not all historical sources warrant evaluation in that manner, curricular designers might purposely use testimonies or other historical accounts (rather than traces) in building their interventions. We believe that the applied nature of the research on historical reading, as it has unfolded in the Anglophone world, has been its strength. By turning to the debates over the nature of historical knowledge, we of course risk abstraction and irrelevance. On the other hand, we may attain a firmer grasp on why we bother to read about the past in the first place.

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21

Writing and Argumentation in History Education

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In this chapter we apply research that has been conducted on diverse aspects of the general domain of writing to a fledgling, but growing, body of research related to writing within the discipline of history. Our purpose is to consider how research on writing in general and on historical writing in particular might translate into improved instructional practices in history classrooms. Building upon the foundation of general writing research, and based on the premise that writing has unique characteristics within each discipline, we explore writing within the context of history classrooms. We focus much of our attention on argumentative writing from sources, which is often viewed as the keystone of historical writing. We review research that suggests that forming cognitive apprenticeships holds particular promise in nurturing students' ability to write compelling historical arguments. Throughout, we synthesize research that history teachers can apply to foster their students' historical literacies and also highlight opportunities to further investigate historical writing.

Research on Writing

For several decades researchers have investigated writing processes and instruction. In this section we review research on the cognitive processes associated with writing, connections between reading and writing, the impact of writing on content area learning, and classroom factors that influence writing. Our purpose in doing so is to find applications for history teachers and to provide the research context within which studies of historical writing have been conducted.

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Cognitive Processes

Although writing warrants study from a range of theoretical perspectives, seminal work by Hayes and Flower (1980) has led to the view that skilled writing requires coordination of multiple, complex cognitive processes. Hayes and Flower described writing as consisting of three primary processes—*planning*, *translating* (i.e., the actual production of text), and *reviewing*—all operating under executive control within the constraints of the external task environment and the writer's long-term memory. The model has been revisited and revised over the years (Hayes, 2006), yet it has retained its cognitive character and influence on the field (De La Paz & McCutchen, 2017). According to Hayes and Flower (1980), planning entails setting goals, generating content, and organizing that content in terms of the developing text. Plans can be general or local, and they can be made in advance or evolve during writing. Currently planning is considered one practice, among many, that expert writers do more than novices and especially more than children.

In addition to differences in the quantity of planning, the quality of planning differs strikingly between experts and children in the absence of instruction. Experts, including historians (Nokes & Kesler-Lund, 2016), formulate goals for their texts (e.g., to reach a given audience or to present a particular persona) and then develop plans to achieve those goals (e.g., to apply a proper tone). In contrast, children engage in little conceptual planning in advance of writing. After receiving a writing task, children begin with *content* planning, such as a listing of ideas, instead of *conceptual* planning, such as considering the needs of their audience (McCutchen, 1995). Content generation remains the predominant form of spontaneous planning observed among students, even among college students (Torrance, Thomas, & Robinson, 1999).

Bereiter and Scardamalia (1987) suggested that inadequate planning is due in part to novice writers' interpretation that the writing task merely requires "knowledge telling." Perhaps due to underlying difficulties in managing multiple processes involved in writing, students convert the writing task into telling what they know about the topic, retrieving any relevant information from memory, and writing it down. Little attempt is made to evaluate or rework this information in light of other rhetorical goals (De La Paz & Graham, 1997). In the context of historical writing, knowledge telling is seen when writers record a claim first and then find facts to support it, rather than allowing interpretations to emerge from evidence (Monte-Sano, 2010).

Anticipating the needs of one's audience is a cognitive skill that influences experts' approach to planning and composing. Proficient writers simultaneously think about their audience and their purpose for writing, creating goals and subgoals in advance (Midgette, Haria, & MacArthur, 2008). In contrast, young writers' plans for meeting their audience's needs typically emerge during the act of writing (McCutchen, 1988). Bereiter and Scardamalia (1987) proposed that learning to generate ideas without a conversational partner to interact with was a major challenge in learning to write for an audience. When composing, students must often anticipate the attitudes, beliefs, and arguments of the audience without the benefit of dialogue. Fortunately, teachers can address this issue

through instruction. To illustrate, Wollman-Bonilla (2001) found that students as young as first grade wrote better stories when the teacher reminded them of their audience as they wrote.

Translation, as Hayes and Flower (1980) referred to the production of text, is now thought to comprise *text generation* and *transcription* (Berninger & Swanson, 1994). Text generation shares many components with oral language production, such as content refinement, lexical retrieval, and syntactic formulation. Transcription, in contrast, requires the cognitive and physical acts of forming written (as opposed to spoken) text. Research makes it clear that writing involves more than merely transcribing spoken language. Most children, for instance, develop the ability to produce basic arguments in conversation earlier than in writing (Stein & Miller, 1993). Indeed, even adolescents struggle to compose written arguments (Salahu-Din, Persky, & Miller, 2008). Transcription, text generation processes, and higher-order executive processes (e.g., planning, revising) compete for limited working memory resources during the act of writing, with implications, especially for young and struggling writers and for students who are learning English. Additionally, unlike transcription, text generation may never approach automaticity and continues to require working memory resources even among college students (Hayes & Chenoweth, 2007; Kellogg, 2001). In other words, with practice a young person may be able to write without thinking consciously about how to move his pen, but formulating ideas will continue to require conscious attention.

Hayes (2004) described revising as a process of *critical reading, text evaluation*, and *rewriting*. Current notions of revision involve critically reading the text as it is translated and comparing it to a representation of an intended or ideal text. As expert writers notice discrepancies they initiate revisions to align the actual text with the ideal text (Bereiter & Scardamalia, 1987; Limpo, Alves, & Fidalgo, 2013). Several processes in this sequence can be problematic for children. First, they may lack a representation of the ideal text. Because children are less likely to engage in conceptual planning, they have fewer specified intentions and their memory representations of the intended text are often vague (Bereiter, Burtis, & Scardamalia, 1988). Second, children may have difficulty reading critically and differentiating their interpretations from the actual text. Further, whereas skilled revisers consider large sections of text as they revise, novices edit sentence by sentence. Thus, expert revision may depend, in part, on sophisticated reading strategies that go beyond reading for surface understanding. Employing such complex reading strategies can present challenges even for college students (Piolat, Roussey, Olive, & Amada, 2004).

Evidence exists that writers' knowledge about genre and writing tasks contributes to their competence in planning, translating, and reviewing. Data from the National Assessment of Educational Progress (NAEP) in the United States consistently show that students throughout schooling compose better stories than persuasive essays (Salahu-Din, Persky, & Miller, 2008). This seems at least partly due to students' experience with different text formats and purposes for writing, as the term *genre* refers to both the structural features of text and the illocutionary purposes that texts serve within specific disciplines and discourse communities (De La Paz & McCutchen, 2017). Young children's exposure to informational

texts, even in school, is more limited than their exposure to narratives (Duke, 2000), and it is therefore not surprising that children's knowledge of expository genres generally develops later than knowledge of narrative. Students who rarely read argumentative texts are unlikely to be able to produce argumentative texts. Students' fluency with expository text structures continues to develop across the elementary grades, high school, and beyond as they are increasingly exposed to expository text (Galloway & Uccelli, 2015).

Connections Between Reading and Writing

As interest in writing processes has grown, researchers have considered the relationship between reading and writing. New theories have dispelled the long-held view of reading and writing as separate or even opposite processes. Instead, modern researchers argue that reading and writing involve similar cognitive processes and symbol systems (Graham & Hebert, 2010; Shanahan, 2006). Notions from 40 years ago that fluent reading was a prerequisite for writing instruction have been replaced by the idea that teaching the two processes together may streamline literacy development (Fitzgerald & Shanahan, 2000). Fitzgerald and Shanahan proposed that good readers and writers share (a) *metaknowledge*, or awareness of literate processes, possessing the ability to monitor their success in reading and/or writing; (b) *content knowledge*, including vocabulary and world knowledge that facilitates comprehension and/or composition; (c) *textual knowledge,* including phonemic awareness (an understanding of the relationship between letters and sounds), syntactic awareness (such as grammar, spelling, and punctuation rules), and text format awareness (understanding organizational structures like the relationship between headings and subheadings or between images and print); and (d) *procedural knowledge*, which is the ability to smoothly apply the other three types of knowledge in order to skillfully read or write. To illustrate the connections between reading and writing, historians develop a keen sense of audience as they critically analyze the purpose behind texts written by others, and as they consider their own purposes for writing (Nokes & Kesler-Lund, 2016).

Research on the connections between reading and writing carries implications for the classroom. Shanahan and Lomax (1988) proposed that the development of reading and writing skills influenced each other in a dynamic relationship. Knowledge and skills gained through reading or writing were transferred to the other process in a manner that made it productive to teach them together (Graham & Hebert, 2010). In spite of the similarities between reading and writing, however, researchers are quick to point out differences. For instance, reading instruction alone is not enough to nurture students' writing abilities—it is necessary to provide instruction in both processes (Fitzgerald & Shanahan, 2000). Further, reading and writing involve not only different but also complimentary cognitive processes that can enhance learning when used together. Providing both reading and writing instruction and integrating opportunities to read and write about the same topic can give rise to new learning (Graham & Hebert, 2010).

Impact of Writing on Content-Area Learning

Writing often enhances learning. How it does so remains a matter of debate, although recent research on writing-to-learn has yielded many insights on writing that promotes content learning (Klein & Yu, 2013). In a review of research on writing-to-learn, Klein (1999) suggested four hypotheses about how writing can promote learning. First, spontaneous writing, such as creating a brainstorming list, not only converts tacit knowledge into explicit knowledge but may help the writer to generate new ideas (Ong, 2013). Like a speaker who starts a statement without knowing how he will finish, spontaneous writing generates new meanings and thus new knowledge. Second, in what Klein (1999) labeled *backward search*, writers create a record of their thoughts, allowing them to return and further develop those ideas. Because an individual's working memory can quickly become overloaded during complex thinking, writing becomes a memory aid, creating opportunities to elaborate, reorganize ideas, or remove contradictions. Some researchers suggest that the process of reviewing and revising promotes new ideas and thus new knowledge. The opportunity to revise ideas after recording them often improves the coherence of students' writing (Hayes, Flower, Schriver, Stratman, & Carey, 1987).

Third, Klein and Yu (2013) suggest that the genre in which students write influences their learning. Writing a summary produces different learning than composing a poem or constructing an argumentative essay. If students read in one genre and write in a different genre the cognitive maneuvers required to do so appear to promote deeper understandings of content (Glogger, Schwonke, Holzäpfel, Nückles, & Renkl, 2012). Research on genre also suggests that writing argumentative essays from multiple sources has the potential to build content knowledge better than other types of writing (Wiley & Voss, 1999). Further, writing that integrates visual with traditional written texts has been found to enhance content learning (Leopold, Sumfleth, & Leutner, 2013). Fourth, through Klein's (1999) *forward search*, writing can transform the way an individual perceives the topic about which she writes. In the end, the author's understanding, attitudes, and intentions toward the topic can undergo a transformation.

Numerous elements during instruction impact students' content learning during writing. For example, new research on writing-to-learn shows that teachers must remain aware of the cognitive load that writing tasks place on students' limited working memory, although the full effects of cognitive load reduction on student learning remain uncertain (Klein & Boscolo, 2016). Further, the provision of explicit instruction on specialized writing strategies (Graham & Perin, 2007) or matching instruction on planning and revising techniques to students' preferred strategies (Kieft, Rijlaarsdam, & van den Bergh, 2008) or providing bilingual instruction on writing strategies (Smirnova, 2015) have been found to increase content learning in diverse contexts.

Within the field of writing-to-learn, students' understanding of writing tasks is of vital importance. Klein (1999) points out that merely asking students to write analytical essays may not produce such prose nor desired content learning. Indeed, researchers in Spain found that students wrote similar responses when asked to summarize a single online source or to produce a synthesis across two

online sources (Mateos, Martín, Villalón, & Luna, 2007). Klein and Samuels (2010) conclude that teachers must teach students about the genre that they wish students to produce. Research in German secondary schools shows that specific (rather than general) writing prompts are more likely to elicit the desired cognitive and metacognitive processes that contribute to students' learning (Hübner, Nückles, & Renkl, 2010).

Classroom Factors

Over the past three decades, writing instruction in North and South America and Europe has shifted from product-oriented instruction to process-oriented instruction (Applebee & Langer, 2006). Prior to this change, the typical practice was to assign a writing task, provide models, and give feedback on students' attempts to mimic the model (Hayes & Flower, 1986). The theoretical landscape began to shift with Emig's (1971) publication of *The Composing Processes of Twelfth Graders*, which led to empirical studies of writing, identifiable professional organizations, and publication outlets for research on writing processes (De La Paz & McCutchen, 2017). These developments increased process-oriented instruction in classrooms, where students applied planning, translating, and reviewing strategies in personally meaningful writing contexts that often led to the development of students' identities as writers (c.f., Gray, 2000).

Scardamalia, Bereiter, and Steinbach (1984) discovered that teaching students to engage in a *planning monologue* using *planning cue*s increased young students' reflection during planning. Bereiter and Scardamalia (1987) proposed that *procedural facilitation*—the provision of cues, prompts, routines, or other forms of support that enable children to make better use of the knowledge and skills they already possess or to call on the use of higher-order strategies—helps students execute more complex composing processes. In a landmark study involving several procedural facilitators, Englert, Raphael, Anderson, Anthony, and Stevens (1991) demonstrated the benefit of using mnemonics, text frames, "think sheets," and graphic organizers, combined with teacher and peer interaction, to teach students more sophisticated approaches to planning. With such instructional support, children across a broad range of ability showed increased metacognitive knowledge of the planning process and wrote better expository texts than children in a control group.

Applebee and Langer (2006) associate general improvements in writing scores on the National Assessment of Educational Progress (NAEP) over the previous three decades in the US with the transition to process-oriented writing instruction. They show that the number of students who engaged in formal, prewriting planning on the NAEP rose from less than 20% in 1984 to about 70% in 2002. Using self-report data from the NAEP, Applebee and Langer (2006) describe other trends: Teachers reportedly facilitate students' awareness of writing processes through the use of rubrics that highlight the characteristics of good writing and by sharing mentor texts—models that demonstrate elements of strong writing. Further, Applebee and Langer (2006) show a correlation between the frequency of writing and writing achievement. Regrettably, they note that

students report spending less time writing than students of earlier generations, with 40% of 12th graders claiming that they never or hardly ever write papers of at least three pages in length. Additionally, they found that older students more commonly engage in sophisticated writing tasks requiring analysis and interpretations, while younger students more commonly write reports, keep journals, and compose stories.

Much writing research has focused on the processes involved in *argumentative writing*. Unlike persuasive writing (defending a preconceived opinion), in argumentative writing the author acknowledges multiple perspectives to deliberatively formulate a rational stance. On one hand, researchers have found several classroom characteristics that negatively impact students' ability to write argumentative texts, such as the infrequency of assigned argumentative writing (Applebee and Langer, 2006), the avoidance of controversy (Hess & McAvoy, 2014), and adults' inability to articulate rules governing argumentative communication (Kuhn & Udell, 2007). On the other hand, studies suggest that teachers nurture students' argumentative writing skills when they help students understand both the cognitive tasks and the social context associated with argumentation (Newell, Beach, Smith, & VanDerHeide, 2011). For example, explicit instruction on the goals of argumentative writing, in terms of content and audience, helps students support their claims with evidence and refute opposing positions (Midgette et al., 2008). Even actions as simple as giving students specific writing prompts that outline the goals of argumentative text can improve their writing (Ferretti, MacArthur, & Dowdy, 2000). Researchers have found that providing students with scaffolding in the form of templates, outlines, graphic organizers (Nussbaum & Schraw, 2007), and sentence starters (McAlister, Ravenscroft, & Scanlon, 2004) improves their argumentative writing (Newell et al., 2011).

The social context for drafting argumentative texts also plays a role in students' ability to write sophisticated arguments. Monte-Sano and De La Paz (2012) found that students' historical thinking and content understanding deepened when they were prompted by teachers to engage in a close reading of texts, critically analyzing documents, and considering causal factors underlying authors' perspectives as they constructed an argument. In contrast, tasks that encourage students to imagine themselves as historical actors often lead to thinking about a given historical situation through the lens of the present and interfere with students' abilities to make historically appropriate inferences. Reznitskaya and Anderson (2002) in the US and researchers in China and South Korea (Dong, Anderson, Kim, & Li, 2008) found that students' participation in collaborative reasoning improved their ability to formulate written arguments. The role of the teacher in supporting the cognitive processes that underlie effective writing cannot be overstated. Smidt (2002) found that an interactive, dialogic relationship between teacher and student, including feedback from the teacher, improved the argumentative writing of students in Norwegian secondary schools.

Not surprisingly, the diversity in students' learning abilities in today's general education classrooms requires considerable attention from teachers (Buckley, 2005; van Hover & Yeager, 2003). Without instruction, students with learning disabilities (LD) employ a less sophisticated approach to composing (Graham &

Hebert, 2010) and write essays that are shorter, less organized, and of poorer quality than those written by students without LD (De La Paz, 1999). Fortunately, instructional techniques designed to meet struggling learners' cognitive and literacy challenges are now well described in the literature (see Graham & Perin, 2007; Harris & Graham, 1996). General research on writing is improving writing instruction across school contexts. With this background in place, we now turn our attention to research on writing within history classrooms and the implications of this research for teachers and researchers.

Research on Writing and Argumentation in History Education

Since experts within various disciplines value unique types of texts, engage with different types of evidence, read and write for different purposes, create specialized products, and interact in different ways, advanced literacy requires some disciplinary expertise rather than merely generic literacies that transfer across subjects (Draper, Broomhead, Jensen, Nokes, & Siebert, 2010; Klein & Boscolo, 2016; Moje, 2008; Shanahan & Shanahan, 2008). General research on writing lays a foundation for understanding historical writing but is insufficient for a deep understanding of the processes involved (Monte-Sano, 2010; Wineburg & Reisman, 2015). Fortunately, a great deal of research has been conducted on many aspects of historical writing. In this section we review research on writing and argumentation within the discipline of history and history classrooms. Reviewed research investigates (a) the characteristics of historical writing; (b) challenges students face when engaging in argumentative historical writing; (c) research-supported instruction on argumentative historical writing, particularly cognitive apprenticeships; (d) effects of student engagement in historical writing; and (e) assessment of historical writing. We conclude by briefly exploring the implications of this research for researchers and history teachers.

Characteristics of Historical Writing

Writing is central to the discipline of history, with most historians engaging in professional writing every day (Pojmann, Reeves-Ellington, & Mahar, 2016). The purpose of their writing is not merely to share historical information. Graff, Birkenstein, and Durst (2015) explain that academic writing, including the writing of historians, is a process of entering a conversation with other academicians. They explain the role of writing in this conversation as "summarizing others … to set up one's own argument" (p. xix). Because historians state their own ideas as a response to others, they must include in their writing critical summaries of others' interpretations. Additionally, the enormity of most historians' research extends beyond the capacity of their memory, requiring them to maintain notes on material they encounter. Further, historians often incorporate elements of narratives in their writing, telling stories of past events (Goldberg, Schwarz, & Porat, 2011; Pojmann et al. 2016).

However, historians are primarily motivated to construct new knowledge, addressing questions of history that have either been neglected by others or, in their view, have been misinterpreted. They must persuade readers that their views are fresh, accurate, meet disciplinary norms, and represent a contribution to humanity's understanding of the past (Grafton, 1997). Argumentative historical writing, through which historians defend their interpretations, their use of evidence, their research methodologies, and the significance of their work, represents the pinnacle of historical writing according to researchers in the US (Bain, 2006), France (Rouet, Perfetti, Favart, & Marron, 1998), the Netherlands (van Drie & van Boxtel, 2008), and Canada (Seixas & Morton, 2013). Thus historical writing includes not only critical summaries, note-taking, and narratives but, more importantly, argumentation.

Historical writing, then, is not primarily school-focused writing, such as fill-in-the-blank worksheets, lecture notes, or five-paragraph essays, that happens to take place in a history classroom (Duke, Caughlin, Juzwik, & Martin, 2012). In contrast, Engle and Conant (2002) describe classrooms of *productive disciplinary engagement*, which obliges students to take on authentic, intellectual problems; to be given the space, agency, authority, and ownership of ideas necessary to construct original solutions; to be held accountable to disciplinary norms through peer review; and to be supported with the necessary resources, such as time, evidence, scaffolding, and outlets for their work. Researchers are beginning to provide evidence that teaching history through productive disciplinary engagement promotes literacy and content objectives better than traditional instruction (De La Paz et al., 2014, 2017; Nokes, Dole, & Hacker, 2007; Reisman, 2012). Students benefit from being taught how to craft a historical argument and being given repeated opportunities to engage in authentic historical writing.

Monte-Sano's (2010) close analysis of high school students' historical reasoning and use of evidence reveals more about the distinctiveness of historical writing. She identified characteristics that distinguished argumentative historical writing from generic argumentation, suggesting that historical arguments require "conceptual understanding, procedural knowledge of historical analysis, an underlying grasp of the topic and discipline, and background content knowledge" (p. 560). Historical writing, like most other types of academic writing, uses data, warrants, and claims to construct a rational argument; however, the nature of the data and warrants, and the way evidence is framed, is singular in the manner in which historians write. Historiographers have long debated the precise role of evidence and the best methods for interpreting events and arguing one's case (see Collingwood, 1943; Popkin, 2016). And several recent international studies suggest that narration enhances historical explanations through the use of chronology (Henríquez & Ruiz, 2014) in which temporal and causal sequences structure memory for adolescents (Goldberg et al., 2011). Narrative competence further requires making a reasoned normative judgment (Waldis, Nitsche, & Aarau, 2016) as well as contextualizing information. Thus historical writing in classrooms also represents a range of descriptive, narrative, critical, analytical, and argumentative genres.

Challenges in Argumentative Historical Writing

Argumentative historical writing presents challenges for novices and is contingent upon the writer's understanding of the nature of history as a discipline. History is not merely the past but involves constructed, debatable interpretations of past events (Lee, 2005). A correct understanding of the epistemological underpinnings of history is prerequisite for argumentative historical writing (Stevens, Wineburg, Herrenkohl, & Bell, 2005). VanSledright (2011) refers to the epistemic positioning that historians take as a *criterialist stance*, pointing out that disciplinary criteria exist for developing, promoting, and judging historical interpretations. Based upon epistemological issues, historians make plans, take a position, anticipate skeptical reactions, brainstorm content, construct an argument, persuasively incorporate evidence, and revise their writing for peer review and publication. Historians appeal to their audience by presenting their position clearly, delivering arguments in a coherent and logical way, supporting their claims with relevant justification and elaboration, and refuting counterarguments that might be raised (Rieke & Sillers, 2001). The writing of historians typically serves a double purpose: to relay their interpretation of historical events, and to convince colleagues that their interpretations are sound (Grafton, 1997).

In contrast, students often view history as the past—simply what happened—factual, fixed, and indisputable (Lee, 2005; Lee & Ashby, 2000; Wineburg, 2001). This view leads to a counterproductive epistemological stance that creates one of the greatest challenges students face in engaging in historical writing: their failure to understand the need for argumentation. If history is merely the past, historical writing should simply relate what happened. Knowledge telling is sufficient. Exposure to objective-sounding textbook accounts as model texts reinforces students' misunderstanding of the nature of historical writing (Wineburg, 1991; Paxton 1997) and obscures the processes historians use to interpret past events and promote their ideas in writing. Assignments in traditional, content-focused history classrooms, such as a short essay on an exam to demonstrate factual recall, further distract students from more authentic types of historical writing. Without being taught explicitly about the work of historians and historical inquiry, or shown how to assume a more sophisticated epistemic stance, students cannot understand the purpose of argumentative historical writing. Fortunately, research shows that students as young as fifth grade, with instruction and practice, begin to assume an epistemic stance that leads to more mature ways of thinking about the past (Nokes, 2014; VanSledright, 2002).

Students might not just fail to understand *why* argumentation is needed in historical writing, they also face challenges in understanding *how* to formulate a compelling argument. Chambliss and Murphy (2002) found that unlike adults, who often comprehended the hierarchical discourse structure of argumentative texts, most fourth and fifth graders failed to recognize the organizational structure of argumentative prose and focused on a text's topic rather than on its argument. Blaming textbooks, which are organized by topic, and teachers, who often provide topic-focused graphic organizers for managing information, Chambliss and Murphy concluded that it was not surprising that the majority of young students create mental representations that are organized topically rather than

rhetorically. Fluency with argumentative texts may continue to be a challenge for many into adulthood—40% of undergraduates that Wiley and Voss (1999) asked to write argumentative essays instead repeated back information found in sources in a product the researchers labeled "listing."

Additionally, students face challenges associated with using historical evidence. Wineburg (1991) suggests that students have a natural tendency to uncritically accept at face value information found in texts. They are unlikely to discount or apply their own interpretation to the content of primary sources (Leinhardt, 2000). Wineburg (1991) and Nokes (2017) found that many students promoted their historical interpretations using a textbook and novel, weak support at best, with the same confidence as when they used eye-witness accounts. Others likewise found that students invested little critical thought when drawing evidence from sources (Britt & Aglinskas, 2002). Without instruction, students do not appear to understand the value or role of historical evidence nor the need to think critically about it. In Leinhardt's (2000) case study, a single gifted student wrote an essay to answer a document-based question at the start of the school year using documents as examples of *his* ideas rather than allowing his interpretations to grow out of the evidence; he used evidence more skillfully by the end of the year, after receiving feedback on several essays and engaging in class discussions during which evidence was evaluated. De La Paz, Ferretti, Wissinger, Yee, and MacArthur (2012) studied a large group of 8th and 11th graders' use of evidence and argumentative strategies, finding that the effective use of evidence distinguished the writing of more skilled from less skilled students at both grades. Monte-Sano's (2010) work corroborates these findings: Skillful use of evidence does not come naturally to most students but is fundamental and essential in the formation of strong written historical arguments.

Epistemological issues and the inability to use evidence are not the only barriers to students' engaging in historical writing; the limitations of their working memory may also interfere (Nokes, 2011). Historical writing often involves sifting through multiple, conflicting, overlapping, and/or fragmentary bits of evidence in order to develop and defend an interpretation. Such reading, thinking, and writing require a number of specialized heuristics identified by Wineburg (1991) and subsequently studied by other researchers (Nokes et al., 2007; Reisman, 2012; Shanahan & Shanahan, 2008). Historians use these heuristics without conscious effort. However, for young people who are being introduced into the process of historical inquiry, analyzing historical evidence involves fewer automatic processes. Teachers ask them to read challenging texts, employ unfamiliar heuristics, judge between accurate and inaccurate information, notice discrepancies between accounts, recall the perspectives of authors, make inferences about audience and purpose, identify relevant excerpts within the evidence, develop an original hypothesis, record their interpretation—keeping in mind their audience and providing evidence to defend their ideas. Needless to say, such a process can quickly overwhelm the cognitive resources of even the most gifted youngster. Researchers have demonstrated the importance of supporting students as they engage in complex causal analyses (Stoel, van Drie, & van Boxtel, 2015). Indeed, researchers have discovered the importance of providing scaffolding (see the Stanford History Education Group, n.d.), simplified texts (Wineburg

& Martin, 2011), and guiding questions (Reisman, 2012) to reduce the strain on a student's working memory.

Issues of working memory are exacerbated with English-language learners (ELL) and other struggling learners. Needless to say, students who face challenges with literacy in general, and for whom decoding and transcription do not occur automatically, face particular difficulty when engaging in argumentative historical writing. A fundamental problem is that students with LD receive little instruction in history classrooms other than as a vehicle for enhancing basic literacy and content learning (Gersten, Baker, Smith-Johnson, Dimino, & Peterson, 2006). LD, novice, and struggling learners, like their peers, may hold misconceptions about the processes involved in historical reasoning (Ferretti, MacArthur, & Okolo, 2001).

Additionally, social studies instruction can be problematic for students with particular challenges in verbal learning and memory (cf. Mastropieri & Scruggs, 2010). This group of students has been reported to show limitations in their ability to consider multiple perspectives (Bouck, Okolo, Englert, & Heutsche, 2008) and, along with other young learners, they evidence delays in cognitive and socioemotional development that constrain their ability to differentiate time and to develop historical empathy (Okolo & Ferretti, 1997). In addition, struggling learners may have difficulties in actively transforming information and differentiating relevant from irrelevant details (Bulgren, Deshler, & Lenz, 2007). Perhaps as a result, students with LD reportedly learn less content in comparison to students without LD after engaging in the same instruction (De La Paz, 2005, Ferretti et al., 2001). These problems are compounded in middle and high school, where content area learning begins to incorporate complex disciplinary standards (Shanahan & Shanahan, 2008). If students with LD are to engage in historical argumentative writing, their teachers must remain aware of the particular challenges they face.

Finally, students' inability to write historical arguments emerges, in part, from their limited opportunities to engage in such writing, particularly in the elementary years (Applebee & Langer, 2006). Though not all historical writing activities promote the development of argumentative skills (Monte-Sano, 2008), each study that has shown improvements in historical reading, thinking, and/or writing, has included multiple opportunities for students to practice with varying levels of support (De La Paz, 2005; Leinhardt, 2000; Monte-Sano, 2008; Nokes et al., 2007; Reisman, 2012). Research makes it clear that most students cannot learn to write historical arguments without repeated practice.

Teaching Argumentative Historical Writing

A growing body of research being conducted internationally suggests that teachers can nurture their students' argumentative historical writing by building background knowledge, teaching skills, and addressing students' understanding of historical inquiry. For instance, educational researchers in the United Kingdom (Lee, 2005; Lee & Ashby, 2000), Canada (Seixas & Morton, 2013), the Netherlands (van Drie & van Boxtel, 2008), and the US (VanSledright, 2002) have identified

metaconcepts or *second-order concepts* that are vital for students to understand in order to engage in sophisticated historical reading, thinking, and writing—*evidence*, *accounts*, *traces*, *significance*, and *perspective* carry specialized meanings in history. A correct understanding of and fluency with these concepts are foundational in historical inquiry.

Several specific instructional methods have been found to improve students' ability to engage in argumentative historical writing. Some of the early research in the US found that teacher-provided feedback on document-based essays enabled advanced students to use historical evidence to write more persuasively (Leinhardt, 2000; Young & Leinhardt, 1998). These researchers hypothesized that adding explicit instruction before giving an argumentative historical writing assignment, combined with feedback on students' written work, would maximize growth. Since these early studies, research has continued to show that explicit strategy instruction improves students' historical reading and writing (Nokes et al., 2007; Reisman, 2012; Stoel et al., 2015).

Nokes, Dole, and Hacker (2007) found that with direct instruction on the strategies of sourcing and corroboration, teacher modeling of these strategies, and repeated opportunities to practice the strategies during document-based activities over a three-week period, students used these strategies in their writing significantly more than their peers who had received conventional instruction. In one of the most comprehensive studies on the effects of year-long instruction with document-based activities, Reisman (2012) found that with explicit strategy instruction across a school year students demonstrated improved historical thinking, better historical writing, and deeper historical content knowledge than their peers in traditional classrooms. Neither of these studies considered students' ability to sustain a historical argument in writing.

Cognitive Apprenticeships

In a series of studies that focused on historical writing instruction, De La Paz and her colleagues (De La Paz, 2005; De La Paz and Felton, 2010; De La Paz et al., 2104, 2017) used a cognitive apprenticeship approach to embed explicit instruction on writing, argument, and thinking in history classrooms. In cognitive apprenticeship (Brown, Collins, & Duguid, 1989) an expert models thinking processes for learners and gradually shifts responsibility for completing tasks to them (Pearson & Gallagher, 1983). Cognitive apprenticeship is both an instructional model that helps teachers organize the learning environment and an approach to learning that helps students see the actions involved in otherwise hidden cognitive processes. In the cognitive apprenticeships formed by De La Paz and her colleagues, teachers made visible the heuristics used by experts by (a) explicitly discussing writing and historical reasoning processes; (b) modeling, coaching, and providing scaffolding as novices used general and disciplinary heuristics; (c) gradually releasing responsibility for reading, thinking, and writing to the students as they acquired competence; and (d) providing feedback as students began to use historical thinking and literacy practices independently.

With federal funding, this team of researchers created a series of historical inquiry lessons they labeled "investigations" that gave students opportunities to practice historical reading and writing. During these lessons, teachers moved through several stages of instruction, helping students set goals for learning and develop metacognitive strategies. Six investigations were spread across an entire year using different historical controversies. In keeping with the cognitive apprenticeship model, during the first half of the year teachers actively taught historical reading and writing heuristics and modeled them by thinking aloud (Collins, Brown, & Holum, 1991). During the second half of the year, teachers gradually released responsibility to students, who applied the heuristics with decreasing levels of scaffolding. Scaffolding included tools for students to use while reading, planning, and writing, and tools for teachers to use for monitoring students' progress (Monte-Sano, De La Paz, & Felton, 2014a, 2014b).

Throughout the year, students were taught to manage reading, thinking, and writing with increasing independence as they learned how to analyze primary sources, evaluate evidence, and plan and write arguments. Rather than addressing skills as discrete or decontextualized, De La Paz and her colleagues sought to maintain the complexity of historical writing by situating students' learning in the context of authentic historical inquiry, such as working with conflicting primary sources to investigate a central question (see Engle & Conant, 2002). During teacher professional development, the researchers modeled and discussed the differences between simply telling students what to do and forming cognitive apprenticeships. After the researchers modeled instructional methods, teachers practiced and planned how to adapt their teaching for different types of learners and analyzed student work to make instructional decisions.

This work collectively shows that when implemented with reasonable levels of fidelity, even when controlling for students' entry learning characteristics (e.g., reading proficiency), academically and culturally diverse students improve in their ability to write historical arguments, their domain-general writing ability, and their historical thinking. Although more work needs to be done to replicate this research with different types of learners and tasks (e.g., more challenging historical writing tasks with older learners), this program of research clearly establishes the viability of the cognitive apprenticeship approach (De La Paz, 2005; De La Paz and Felton, 2010; De La Paz et al., 2104, 2017).

Students' Historical Writing

Clearly, argumentative historical writing is difficult for most students and requires a great expenditure of patience, energy, and resources by teachers. In order to nurture these skills, substantial instructional time must be devoted to forming cognitive apprenticeships and/or teaching, modeling, and supporting reading, thinking, and writing strategies. It is fair to ask whether this investment is worthwhile. What are the positive outcomes when students attempt historical writing? Research to date provides evidence that as students learn to produce argumentative historical writing they (a) engage in knowledge transformation, (b) develop richer content knowledge, which they retain at significantly higher rates for longer periods of time, and (c) develop general and specialized literacy skills.

Writing that involves *knowledge transformation* contrasts strikingly with the knowledge telling that characterizes much of the writing of young people. Klein (1999) contends that, though rare among novices, it represents the highest form of writing-to-learn. Klein and Rose (2010) suggest writers' efforts to solve authentic rhetorical problems within content areas, such as constructing an argument to identify the causes of a historical event, can lead to knowledge transformation. Engle and Conant (2002) explain that such writing is an essential element of productive disciplinary engagement. Fortunately, research conducted by Monte-Sano (2008, 2010) and De La Paz and her colleagues (2005, 2010, 2014, 2016) demonstrates that students can engage in knowledge transformation under the right circumstances. As educational researchers across content areas call for greater disciplinary participation for students (Draper et al., 2010; Moje, 2008; Shanahan & Shanahan, 2008), investing the time and energy to nurture students' argumentative historical writing seems to be an effective way to meet the ambitious goals set by these reformers.

Further, research suggests that students who engage in historical reading, thinking, and writing retain content knowledge better than those who receive traditional, lecture-focused instruction (Nokes et al., 2007; Reisman, 2012; Stoel et al., 2015). In one study, students who engaged in 10 hours of inquiry activities scored significantly higher on assessments of content knowledge than their peers who received 10 hours of content-focused instruction (Nokes et al., 2007). Reisman's (2012) year-long study replicated these patterns. These findings—that content knowledge increases by replacing content instruction with historical reading and writing instruction—though counter-intuitive, makes sense in light of research on how students learn (Bransford, Brown, & Cocking, 2000). Students may retain more content through inquiry because in the process of developing and defending interpretations they apply, integrate, and make connections between what may otherwise remain discrete historical facts.

Results of ongoing research demonstrate numerous other positive outcomes as teachers nurture students' historical writing skills. Current research corroborates the findings of Wiley and Voss (1999), that writing argumentative essays from multiple texts produces greater content learning than other types of writing. Further, researchers have found advantages in the use of historical discussions rather than textbook reading or nondisciplinary discussions as a preparation for engaging in argumentative historical writing (Goldberg et al., 2011; Wissinger & De La Paz, 2016). The development of historical content knowledge, which increases through argumentative historical writing, is instrumental in understanding the context of current events (Mosborg, 2002) and improving historical consciousness. Fluency with the structure of arguments prepares students to sort out the claims presented to them as they engage the world as citizens and consumers. As Wineburg explains,

> Today our iPhone supplies [the information of a textbook] in a split second. What iPhones cannot do, however, is distinguish solid from spurious evidence, or discern cogent argument from a stupefying cloud of smoke and mirrors. For that … our students must be historically literate. (as quoted in Nokes, 2013, p. xii).

Assessing Argumentative Historical Writing

VanSledright (2014), and Ercikan and Seixas (2015) demonstrate how assessments in history have not kept pace with new objectives for evaluating students' historical thinking. Reich (2015) provides evidence that traditional assessments such as multiple-choice tests, even those that claim to require higher-order thinking, may not be valid assessments of historical thinking. VanSledright (2014) has developed nontraditional, weighted multiple-choice test items, but little has been done to investigate the practicality of their widespread use. Instead, students' writing, particularly argumentative writing, may hold the greatest promise for assessing students' historical thinking.

Instruments that use prompted writing to assess historical thinking and reasoning are being developed and piloted in many nations. Swedish researchers (Eliasson, Alvén, Yngvéus, & Rosenlund, 2015) have developed a written assessment that measures students' historical consciousness and fluency with metaconcepts such as causation, continuity, change, and temporal orientation (relating past, present, and future). Their assessment instruments require students to analyze evidence and respond to a written prompt by constructing, explaining, and defending an interpretation. Seixas, Gibson, and Ercikan (2015) have developed similar instruments that use students' writing to measure their ability to use evidence, understand cause and consequence, recognize perspectives, and engage in other elements of historical thinking. German and Swiss researchers have collaborated on a written assessment that measures students' "narrative competence" or ability to reconstruct historical events (Waldis, Hodel, Thünemann, Zülsdorf-Kersting, & Ziegler, 2015). In contrast to these instruments, which require substantial time to administer and involve the burdensome scoring of lengthy essays, Breakstone (2014) proposes that shorter writing samples can be used to assess elements of historical thinking, such as students' ability to distinguish between reliable and unreliable sources. Although there is some disagreement about the best form of assessment, what is clear in current research is that students' writing, including argumentative writing, can be used to assess mastery of objectives related to historical thinking.

In related research, Monte-Sano (2010) and her colleagues (De La Paz et al., 2014, 2017) have designed, piloted, and used a rubric to assess students' argumentative historical writing. Their rubric focuses on four aspects of historical reasoning: *substantiation*, students' ability to use evidence to support a claim; *perspective recognition*, students' acknowledgment of texts as representing a certain point of view; *contextualization*, students' ability to situate their argument within an accurate historic, geographic, and social setting; and *rebuttal*, students' ability to deal rationally with opposing points of view. Their rubric breaks down the complex process of argumentative writing into its component parts, allowing researchers and teachers to identify specific strengths and weaknesses in students' argumentative historical writing.

Discussion

Drawing upon the growing body of research on domain-general writing and historical writing, we highlight some of the implications for research and teaching history. Research within the field of historical writing is in its early stages, creating countless possibilities for study. Little has been done to investigate the writing processes used by historians. Instead, research has compared the historical writing processes of more advanced and novice history students (De La Paz, 2005; Monte-Sano 2010), with the products of strong students serving as a model of what weaker and younger students should be taught to produce. With the current focus on process in writing instruction (Applebee & Langer, 2006), it seems essential that more be done to understand the writing processes used by historians during planning, translating, and revising, and some exploratory studies are now being conducted (Nokes & Kesler-Lund, 2016). If educational researchers want to understand what it means to write like a historian, they should observe historians' writing processes and not simply students' products that represent strong historical writing.

Additionally, more must be done to develop assessments that efficiently and reliably measure students' historical reading, thinking, and writing. Continued investigation of the instruments and rubrics designed by Smith and Breakstone (2015), VanSledright (2014), and Seixas et al. (2015) in a variety of educational contexts is needed. Reliable, valid, and practical assessments of students' epistemologies and metaconceptual understandings are necessary to help teachers diagnose the causes for deficiencies in students' ability to write historical arguments. As the goals of history education change to include the nurturing of argumentative historical writing, new research-based and field-tested assessments are required (Ercikan & Seixas, 2015; VanSledright, 2014).

Developmental studies, like those carried out in the UK (Ashby, Lee, & Shemilt, 2005; Lee & Ashby, 2000), could be conducted that focus on the development of argumentative historical writing. The groundwork for longitudinal studies has been established by Levstik and Barton's (2008) work with youngsters; VanSledright's (2002) and Nokes's (2014) work with fifth graders; Stein and Miller's (1993) study of children's oral argumentation; and De La Paz and her research teams (De La Paz, 2005; De La Paz and Felton, 2010; De La Paz et al., 2104, 2017) and Monte-Sano's (2010) work with middle and high school students. Goldberg, Schwarz, and Porat's (2011) research involves older secondary students, and Stoel, van Drie, and van Boxtel (2015) add international perspectives on students' development in argumentative writing. Longitudinal studies tracing progress in students' argumentative historical writing over time could facilitate the creation of curriculum maps that establish a plan to nurture students' argumentative historical writing skills over the course of their elementary and secondary school years.

Additionally, historians not only craft historical arguments in their writing, but they also produce argument-driven lectures, visual presentations, documentary films, and illustrations. Many educational researchers suggest the value of

broadening the definition of text to include print and nonprint, language-based and non-language-based representations that disciplinary experts value (Draper et al. 2010). Researchers might consider historical writing more broadly as historical creating—researching historians' processes in crafting arguments in alternative formats. Perhaps fostering students' ability to craft arguments in digital media, such as an argument-driven web page, is a stepping stone toward having them craft more sophisticated argumentative historical prose. Recent work in project-based learning has been conducted by Hernández-Ramos and De La Paz (2009), who found that eighth graders who designed multimedia projects about historical topics enjoyed history more and learned content and historical thinking skills significantly better than their peers who engaged in more traditional instruction. Researchers within the field of science have found that learning increases when students produce multimodal texts (Leopold et al., 2013). More could be done to explore the effects of producing multimodal texts, particularly authentic argumentative products, on history students' learning.

Research also must be done on the social, affective, and motivational components of argumentative historical writing. Researchers might explore whether giving students an authentic reason for writing (i.e., a purpose that mirrors the writing of individuals outside of schools), or having peers review writing in a manner that approximates, to the degree possible, the reviewing of academic manuscripts, encourages students to invest more effort into writing (Duke et al., 2012). Researchers are beginning to explore the impact of collaboration on students' learning from writing (Klein & Boscolo, 2016). More should be done to investigate the same processes within the field of collaborative historical writing.

In addition to suggestions for future research, our review carries numerous implications for teachers who desire to engage students in argumentative historical writing. Although some leaders in the field argue that the emulation of historians should not be the goal of history teaching (Barton & Levstik, 2004), we contend that when students develop age- and ability-appropriate skills associated with historical reading and writing they are better prepared for citizenship and the literacy tasks of the 21st century. We suggest that teachers, keeping in mind their teaching context, consider the suggestions in Table 21.1 regarding the conditions experts and novices experience when writing, the effects of instruction, and classroom implications.

In closing we point out that as teachers consider how to address their students' development of argumentative historical writing skills there are many research-tested materials available that may help.

1) Websites such as the History Education Group at Stanford (http://sheg.stanford.edu/), Bob Bain's Big History Project (https://school.bighistoryproject.com/bhplive) at the University of Michigan, the Roy Rosenzweig Center for History and New Media (http://rrchnm.org/), the Centre for the Study of Historical Consciousness (http://www.cshc.ubc.ca/) at the University of British Columbia, the Annenberg Learner's Reading and Writing in the Disciplines resources (https://www.learner.org/courses/readwrite/disciplinary-literacy/what-is-disciplinary-literacy/1.html), and the University of Maryland's "history labs" (http://www.umbc.edu/che/historylabs/).

Table 21.1 Implications for Teaching and Doing Historical Writing

	Conditions	Effects of Instructional Interventions	Classroom Implications
Planning	• Experts engage in rhetorical planning before writing, considering audience and purpose. • Without instruction, children focus on knowledge telling rather than on more sophisticated rhetorical goals. • Students' misconceptions about the nature of history and unproductive epistemologies interfere with their construction of written historical arguments.	• Reminding children about audience during writing helps them write for that audience. • The shift from product to process instruction has increased students' use of planning during formal writing assessments. • Explicit instruction on the goals of argumentative writing helps students support claims with evidence and refute opposing positions.	• Provide direct instruction on the nature of history and the rhetorical purposes of argumentative historical writing. • Use a planning monologue, planning cues, and other procedural facilitators to enhance students' planning. • Help students transition from generating written plans during instruction to internalize planning processes more generally
Translation	• Transcription and text generation place high cognitive demands on students' working memory, particularly for students with LD or who are ELL in complex historical reading and writing tasks. • Argumentation in history relies upon unique evidence and ways of crafting claims.	• Students, including those who are ELL or have LD as well as other novice learners, benefit from scaffolding, explicit instruction, and cognitive apprenticeships. • Students' proficiency in historical reading and writing increases with multiple opportunities to practice.	• Provide specific and clear writing prompts, templates, outlines, graphic organizers, and/or sentence starters. • Give opportunities for collaborative reasoning with peers and/or the teacher before and during writing. • Allow many opportunities to practice historical writing with feedback.
Revising	• Young people have less exposure to informational texts than to other genres and, thus, lack a representation of an ideal text to which to compare their writing during revising.	• Students' ability to produce genres of text increases as they have more exposure to those genres.	• Expose students to mentor texts. • Create rubrics that highlight the characteristics of good historical writing.
Reading and writing	• Experts employ similar metaknowledge, content knowledge, textual knowledge, and procedural knowledge in reading and writing.	• Teaching reading and writing together, particularly when they involve different genres, maximizes learning. • Reading instruction alone is not as effective in nurturing students' writing as providing both reading and writing instruction.	• Provide instruction in both historical reading strategies (i.e., sourcing, corroboration) and historical writing strategies (i.e., substantiation, rebuttal). • Give repeated opportunities to engage in argumentative writing with historical evidence.

2) Published curriculum and books such as *Reading Like a Historian* (Wineburg, Martin, & Monte-Sano, 2013) and *Reading, Thinking, and Writing about History* (Monte-Sano et al., 2014b) that provide lesson ideas, materials, rubrics, and other resources for teachers and students.
3) Programs and organizations such as National History Day (http://nhd.org), the Gilder-Lehrman Institute of American History (see http://www.gilderlehrman.org/history-by-era), the Library of Congress (http://www.loc.gov/teachers/index.html), and the National Archives (https://www.archives.gov/education/professional-development) that provide training and support for teachers.
4) Resources that make research on reading, thinking, and writing in history accessible for teachers, such as *The Big Six: Historical Thinking Concepts* (Seixas & Morton, 2013), *Building Students' Historical Literacies* (Nokes, 2013), or *Why Won't You Just Tell Us the Answer?: Teaching Historical Thinking in Grades 7–12* (Lesh, 2011).
5) Professional organizations that facilitate development of pedagogical content knowledge, such as the National Council for History Education, the National Council for the Social Studies, and the American Educational Research Association's Teaching History special interest group in the US, and several special interest groups in the European Association for Research on Learning and Instruction.

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22

Film Media in History Teaching and Learning

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The question of movies in the history classroom never fails to provoke a range of reactions: a golden opportunity to "bring the past alive;" a time-wasting and pedagogically passive distraction from "real history;" a rich historical source to which modern students thankfully relate; a scattered minefield of misinformation (Briley, 2002; Butler, Zaromb, Lyle, & Roediger, 2009; Carnes, 1996; Dobbs, 1987; Hess, 2007; Hobbs, 2006; Lundberg, 2011; Marcus, Metzger, Paxton, & Stoddard, 2010; Maynard, 1971; Paris, 1997). Scores of books, journals, magazines, and websites advocate for the use of movies as a device for teaching history. Research on their effective classroom application and cognitive impact, however, has been sporadic at best. It is ironic that in a world awash with audiovisual representations of the past, the finer points of movies as teaching tools may remain unexamined by many teachers (Donnelly, 2016; Hobbs, 2006; Marcus and Stoddard, 2007).

Motion pictures have been broadly promoted and shown in history classrooms practically since the medium was invented (Consitt, 1931; Saettler, 1990; Sumstine, 1918), but that does not imply they have been employed widely, consistently, or effectively. Barriers existed to regular classroom use, including limited availability, the need to share expensive projectors in multiple classrooms, the notorious fragility of celluloid film, and not least a professional stigma sometimes associated with teachers who show movies during the school day in miseducative ways (Cuban, 1986; Hobbs, 2006). Even as recently as the 1990s, easily breakable VHS tapes were expensive for schools to buy, often had to be reserved from a central warehouse weeks in advance, and demanded elaborate rewinding and cueing up for each class period. Since that time, the invention of inexpensive DVDs, computer-based storage and projection, and web-streaming video have made showing full-length feature movies and shorter excerpts or documentary films easy and comparatively trouble-free. Yet nontechnological barriers still exist (Donnelly, 2014), and none of this speaks to what students actually learn about the past from the act of watching.

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The term *historical film literacy* refers to an offshoot of media literacy focused on audiovisual representations of the past, whatever their varying forms—commercial motion pictures, television shows, miniseries, docudramas, documentary films, and the like (Marcus, Paxton, & Meyerson, 2006). The ability to interpret and analyze historical motion pictures is a topic of considerable importance in the field of history education because research strongly suggests that a great deal of what students today think they "know" about the past comes not from textbooks, teachers, or even parents but from movies (Afflerbach & VanSledright, 2001; Marcus et al., 2006; Wineburg, Mosborg, Porat, & Duncan, 2007). Movies ranked second only to photographs in a survey gauging the ways adults come in contact with and feel connected to the past, even though they are not particularly trusted as historical sources (Rosenzweig & Thelen, 1998). This same survey found adults to be generally uninterested in and disconnected from the version of history they endured during their school years.

Historical references surround us outside of school—at home, at church, at the movies, on the internet—bombarding us with sociocultural, nationalistic, and other narratives of the past (Justice, 2003; Wineburg, Mosborg, Porat, & Duncan, 2007). As one of the most popular forms of media, movies are an important cog in the "cultural toolkit" that helps people understand the world and communicate effectively in it (Wertsch, 2002). In short, movies may well be the most influential historical document in the minds of the general public today.

This chapter reviews the considerable body of research and scholarship that centers on the use of motion pictures to teach history by examining and appraising studies that investigate teachers' pedagogical practices with film and what students learn from the complex process of viewing and reasoning about these historical documents. While the vast majority of research cited will focus on the discipline of history, studies in related fields, such as social studies and media studies, will be touched upon when relevant. The focus will be on commercial motion pictures ("movies") as well as documentary films and "docudramas"—dramatic movies produced specifically for educational purposes, often about particular historical figures, events, or time periods. Docudramas were exceedingly common in the first half of the 20th century, what we refer to as the early age of movies in the classroom. These docudramas were often produced by the same companies that sold film or movie projectors (notably Edison Manufacturing or Eastman Kodak). While they are in some ways different both in content and motive than "Hollywood" movies, at their core, docudramas are commercial products featuring professional actors and presenting a dramatic narrative of the past.

An entire body of academic literature exists that analyzes and critiques the manner in which historical content is presented in movies (Carnes, 1996; Guynn, 2006; Hughes-Warrington, 2009; Rollins, 2004; Rommel-Ruiz, 2011; Rosenstone, 2006; Toplin & Eudy, 2002; Treacey, 2016). This literature can be of value to educators as it provides ideas for understanding motion pictures as historical documents, such as the strengths and weaknesses of particular representations of the past, or more generally the attributes of movies that give the viewer the (potentially misleading) feeling of historical authenticity. However, this field of study is more analytical commentary than research-based and often does not

speak directly to educational contexts. Therefore it will not be a major focus of this chapter.

Research into the teaching and learning of history using film was far more copious, and considerably better funded, during the early to mid-20th century than it is today. Much of this initial research was quantitative in nature and regarded movies as a potential replacement for the classroom teacher, rather than a pedagogical tool intended to supplement the practice of living instructors. While the early research on film in the classroom was large-scale and ambitious, its results were decidedly mixed and indeed disappointing for the leading educational technologists of their time. It turns out that it is not easy to quantify what students learn from watching a movie. By the 1930s, the scale and scope of scholarship on learning from film in the field of history was truly impressive: huge surveys, myriad experiments and quasi-experiments, short- and long-term observational studies of entire schools and individual classrooms. However, by the 1960s there appears a relative lull in the academic literature. Showing movies in class was no longer novel and came to be discouraged.

The cognitive revolution since the 1960s inspired a rekindling of interest in the study of film media in the history classroom, as well as a change of focus. As in many other fields of educational research, *The Mind's New Science* (Gardner, 1985) made a profound impression on both the questions posed and the research methodology employed. Much—but not all—of the recent research is qualitative in nature and tends to view movies not as stand-ins for teachers but as visual and auditory documents that take their place in the classroom alongside other primary and secondary historical sources. In this research paradigm, movies are to be "read" with some of the same analytic and interpretive skills students should ideally use with written texts and other historical sources.

Early Scholarship on History Teaching with Film

The primary purpose of this chapter is to review more modern studies in the field, but a look at early scholarship is offered for the purpose of providing historical context and juxtaposing the methodological and conceptual frameworks of research across roughly 100 years. It is unclear when the first classroom teacher screened a movie in an effort to teach about the past, but by the year 1918—when movies were silent and projectors as costly as they were fickle—researchers were already making systematic study of film use in the history classroom (Consitt, 1931; Sumstine, 1918).

The age of "Visual Education" had begun in earnest by the 1920s. At the time, Visual Educators were on the cutting edge of classroom technologists, and much of their writing displayed an almost evangelical zeal (Cuban, 2001; Freeman, 1922). In 1922, a journal called *The Educational Screen* began publication with the proclamation it would "get to the truth about visual education—in all its phases and in its broadest aspects—and serve it up in a form palatable to thinking Americans" (Greene, 1922, p. 5). It continued publication until the late 1960s. Much of the early passion for movies in the classroom was based on just that: passion. University of Chicago Professor Frank N. Freeman concluded,

> In the interests of visual education, then, experimental investigation should be made to determine the type of educational subject matter to which it is best adapted, and the manner in which it may best be organized.... Unsound propaganda, on the other hand, will lead to more rapid initial progress, but this will be followed by a reaction which will result in slower progress in the end. (Freeman, 1922, p. 266)

Early research on movies in the classroom most often made use of experimental or quasi-experimental design, employing treatment and control groups with one viewing a film and the other witnessing more traditional methods of teaching, such as lectures, maps, charts, slideshows, and so on (Consitt, 1931; Freeman, 1924; Wise, 1939). For the most part, the films studied were not dramatic "Hollywood" movies but motion pictures made specifically for the classroom—documentaries or docudramas attempting reenactments of historical times or events. Final measures of student learning were invariably operationalized with some sort of written or objective test.

Weber (1922) carried out a series of experiments seeking to compare the effectiveness of teachers to that of documentary films. One of these pitted documentary films against teachers engaging in a review and quiz sequence. While the results were interesting, Weber lamented the psychometric difficulties of measuring the influence of movies versus other pedagogical practices. In this case, the teachers in the control group (no movie) were handcuffed by a scripted lecture, which Weber suspected was of low quality. This may have been the first, but it was certainly not the last time, an educational researcher bemoaned the inadequacy of conventional research methodology in assessing the contributions of film to student learning (Horn, 1929; Marcus et al., 2006; Wise, 1939; Wood & Freeman, 1929).

In 1928 Freeman, now backed by Eastman Kodak, published the results of an experiment billed as "the most extensive experiment ever undertaken in education" (Greene, 1928, p. 220). By this time many large school districts employed Directors of Visual Learning and were spending substantially on educational movies and equipment: Not only the Kodak film and camera company was invested in the outcome of the experiment. Using 11,000 elementary and junior high school children in 12 U.S. cities carefully divided into experimental and control groups and employing a pre-test/post-test design, the scope of the experiment was remarkable by today's standards. However, the results were not what educational technologists of the time might have hoped. Students in the experimental group did outscore those in the control group, but only by about one-and-a-half points on a scale of 100. Once again, the difficulty of measuring the impact of motion pictures on student learning through traditional experimental design was evident: "This is a case where 'objective' test results are not ... comparable to the composite 'subjective' opinion of the teachers who were privileged to use films during the experiment" (Enlow, 1929, p. 229). For instance, teacher comments collected outside of the experimental protocol indicated increased and more sustained interest in the topics studied; increased originality and greater participation; a greater desire and ability to discuss and write about subjects; greater facility in connecting lessons with community conditions; marked

improvement in vocabulary; and increased ability to concentrate, think, and to reason (Enlow, 1929).

Perhaps the most comprehensive early work on the use of film in the teaching and learning of history is Frances Consitt's book *The Value of Films in History Teaching*, which presents a wide variety of experiments run in the United Kingdom, both "formal" and "informal" (Consitt, 1931). By this time, the view of film in the classroom was more nuanced. Gone was the idea that movies would replace teachers, and instead this research primarily targets documentary film, docudramas, and edited dramatic movies as a supplementary visual tool to enhance the typical classroom format. Movies mostly were still silent, but the classrooms Consitt describes do not seem old-fashioned, as students are depicted, among other things, viewing and critiquing the historical authenticity of the actors and events portrayed in films and movies, following and elaborating on specific historic characters, and collaborating to develop their own screenplays (Consitt, 1931). This more complex view of movies can also be seen in *A School Uses Motion Pictures* (American Council on Education Studies, 1940), an almost ethnographic report on the use of motion pictures in Tower Hill School, Wilmington, Delaware. The report richly describes film use in the classroom across grade levels, between different disciplines, and in different settings (auditoriums vs. classrooms).

While the early scholarship on teaching history with film is impressive in its scope and funding, it would be fair to say that it failed to support the initial claims about the wonders of teaching with film. On the other hand, this prolific scholarship should not be ignored and certainly served to highlight the complexity of assessing the cognitive impact of motion pictures on the learning of history. It took the cognitive revolution and specifically the conceptualization of movies not as an alternative or supplement to text, but as an alternate *kind* of text, to advance a new direction.

Modern Research on History Teaching with Film

Much of the research on teaching and learning through film in the early decades was experimental or quasi-experimental in nature, setting out to measure observable behaviors such as objective test results, and paying less attention to the fine-grained investigation and analysis of less tangible cognitive and metacognitive events. Disciplinary content was seen as almost incidental to the important research questions, which targeted the learning of "facts" and the presumably general learning processes resulting from the interaction of motion pictures and the student mind, most prominently motivation. Much the same can be said for research into educational technology as a whole (Saettler, 1990).

This began to change with the cognitive revolution and the introduction of innovative ideas that affected many fields of educational research (Gardner, 1985). This new research paradigm challenged the notion of general problem-solving mechanisms and instead placed the spotlight on knowledge structures both internal and external to the human mind, including the academic disciplines. In this light, movies were no longer conceptualized as a replacement for

teachers, or as a means to make schooling more efficient, or even as an substitute for lectures, but instead as alternative kinds of historical documents.

The cognitive approach to educational technology views the learner as the active constructor of knowledge, not a passive receptor. Similarly, movies themselves are viewed not as a vehicle primarily intended to promptly transmit facts and ideas into the compliant minds of learners but as "texts" that teachers and students "read" both as individuals and collectively (Considine, 1989; Costanzo, 1992). As such, movies began to be referred to as "film texts" (Briley, 1990) or "moving image documents" (O'Connor, 1990, 2007).

In the case of written text, readers form mental representations based upon their selective evaluation of what is read by connecting information imbedded in text with individual past understandings (or knowledge). These representations are continually updated as reading proceeds (Beck, McKeown, & Worthy, 1995). According to constructivist learning theory, text holds no absolute meaning in and of itself (Spivey, 1990). However, it would be going too far to assert that words on a page have no properties of their own or that they are always and only what their readers make of them. While readers certainly exercise a level of interpretive freedom over the ink marks on a written page, the "making" of meaning is in fact considerably limited by the author's act of composition (Scholes, 1985). If this were not the case, there would be little point in studying how different rhetorical or technological genres influence student thinking.

The same can be said of movies, which are from the mind's point of view simply another rhetorical genre. Thus, in considering the cognitive demands of learning about the past, it becomes important to consider multiple aspects of a movie text that influence the construction of meaning. These include the script and the author(s) who wrote it, the actors, the director, the producer(s), the context in which the film is set, the times in which the film is shot, the art of filming, lighting, set design, costume, and so on.

Modern research on the teaching and learning of history with film is small in scope compared to 1918–1960. Even when outfitted with a fresh conceptual framework for how the mind represents film texts, the vast majority of recent research in history education has targeted learning through the written word (c.f. Reisman, 2012; Rouet, Britt, Mason, & Perfetti, 1996; VanSledright, 2002; Wineburg, 1991, 2001; Young & Leinhardt, 1998). That said, the past decade has witnessed a rebirth, and even a burgeoning, of studies in the field of movies in the history classroom that is well worth considering given the substantial impact movies have on students historical consciousness.

Movies and Historical Consciousness

All of us, individually and collectively, maintain a historical consciousness—an understanding of the past shaped by cognitive and cultural factors encountered both inside and outside of school (Seixas, 2004). While the written word predominates the manner in which professional historians come to understand and think about the past, the same may not be the case for students in K-12 schools, and indeed the public at large, who are likely to encounter history

embedded in visual forms such as pictures, movies, television, and computer games (Davis, 2000; Metzger & Paxton, 2016; Rosenzweig, & Thelen, 1998). Average American students spend almost five hours per day watching television, or viewing video content on some other technology, such as computers or smartphones (Nielsen, 2014).

Students learn from and in an environment saturated by video images, with many learning to read, write, listen, speak, and make meaning of their lives through viewing mass media, including film (Aiex, 1988). This truism of modern culture can rear its head in surprising places. For example, during a think-aloud protocol studying the impact of author visibility on student reading, the thoughts of one high-achieving student were curiously guided by the 1963 motion picture *Cleopatra*. Thinking aloud through a textbook excerpt on Ancient Egypt, the young woman could not let go of the schema of the Egyptian pharaoh as portrayed by Elizabeth Taylor and Mark Antony as played by Richard Burton (Paxton, 2002).

Afflerbach and VanSledright (2001), while ostensibly studying the effects of imbedded texts within an "innovative" textbook, found the thinking of multiple middle-grade students strongly influenced by the 1995 Disney animated musical *Pocahontas*: "The students demonstrated a subtle form of intertextual analysis, wherein they judged the veracity and accuracy of the school history text's account against the Disney film" (p. 703). The tenacity of this cartoon narrative within the minds of students was dubbed the "Disney effect." Seen long before the think-aloud reading that was the centerpiece of this research, the movie formed "the prior knowledge and prior experience with which new information was judged. The students did not appear to understand film as yet another 'text' to be read critically" (p. 704).

In an effort to understand how history is passed from generation to generation within the household, and within society, anthropological research techniques were trained on 15 teenagers from three different high schools in the Puget Sound region over a 30-month period (Wineburg, Mosborg, & Porat, 2001; Wineburg, Mosborg, Porat, & Duncan, 2007). Interviewing both parents and children on the topic of the Vietnam War, a conflict decisively burnished into the memory of the former but archaic to the latter, a number of factors were found that contribute to the "collective memory" passed along from generation to generation. None was more central than motion pictures, and in this case the 1994 movie *Forrest Gump*, a historical fantasy in which an entirely fictional character interacts with historical figures and film footage.

Not only did movies play a big role in the initiation of the historical understandings of this diverse group of students, they also contributed to what the authors termed "historical occlusion"— commonly forgotten narratives available in the documented historical record but "largely blocked from the view of the historical present" (Wineburg, Mosborg, Porat, & Duncan, 2007, p. 171). In short, movies can easily contribute to misapprehensions about the past if they are viewed indiscriminately or uncritically. Regrettably, they are often viewed uncritically, even in today's history classrooms and even after a century of educational research on the topic (Donnelly, 2013, 2016; Gabella, 1994; Marcus, 2007; Marcus & Stoddard, 2007; Russell, 2012).

Showing movies in the classroom may be viewed by some as a handy crutch for lazy teachers wasting students' time (Hobbs, 1999; Maynard, 1971). Among historians, there is disagreement about the idea of using film, as opposed to written text, as media for expressing the results of their work (Guynn, 2006; Warmington, Van Gorp, & Grosvenor, 2011). The fact is that both written text and the filmic image offer constructed representations of the past, each shaped by the conventions of the respective genre (Rosenstone, 1995). However, historians now acknowledge (if somewhat begrudgingly) that film may constitute the predominant influence on the general public's historical understanding (Rosenstone, 2002; White, 1999).

Any perceived stigma aside, motion pictures are perennial teaching tools in history classrooms, though technological obstacles have made their adoption and widespread use uneven (Cuban, 1986). The advent of modern technology has altered this technological landscape and serves to put movies and documentary film more than ever at the disposal of history educators, for better or worse. Movies are used extensively in history classrooms today, even if how they are used is poorly documented (Donnelly, 2006; Marcus & Stoddard, 2007). What students actually learn from history movies is another question, one that takes center stage in what recent research exists on the topic.

A seminal moment in this body of research was Peter Seixas's (1993) article "Popular Film and Young People's Understanding of the History of Native American-White Relations." Seixas recognized the historical debates engaged in by scholars and the public at large are typically encountered by young people not in textbooks, or even in schools, but in popular media: "We know very little, however, about how young people 'read' the historical films they watch," he wrote (p. 351). Seixas likewise observed that while movies may provide "empathetic entry" into history—as in the faintly oxymoronic phrase "bringing the past to life"—they may also discourage the critical distance necessary to parse movies like any other historical document as constructed, cultural products of the people and times in which they are generated.

Instead of looking at the effects of movies or no movies on the test scores of experimental and control groups, Seixas (1993) focused deeply on the content *and* the form, showings segments of two very different movies about the same historical time period to a small group of high school students. A more modern movie, *Dances with Wolves* (1990) was juxtaposed with an older film, *The Searchers* (1956). The former was more contemporary not only with respect to the date of its production, but also in terms of its production values and the broad interpretation of Native American/White relations. Using semistructured interviews, Seixas probed the manner in which these movie texts impacted these subjects' understandings of the past.

Although the sample size was small and the conclusions reached necessarily "exploratory," Seixas's (1993) findings and analysis were nonetheless intriguing and, for the field of study pivotal. Of note, the students plainly took the movies seriously as historical documents, despite both being Hollywood productions featuring familiar star actors. This was particularly the case with the more modern of the two movies. Students viewing this film "understood the film depiction as a window on reality" (p. 357). During interviews they often made seamless

transitions between talking about the film's content and discussing the history of Native Americans.

Movie aesthetics had a big impact on students' views of historical accuracy, as they made internal judgments concerning the artistic qualities of productions, and external observations concerning the relationship of film to reality (Seixas, 1993, 2007). The modern production values and sympathetic portrayal of Native Americans, in short the contemporary interpretive framework, of *Dances with Wolves* rendered the characters and plot believable to these students. The opposite was true with the older movie, *The Searchers*, which students judged as dated, poorly acted, and factually inaccurate. In other words, ironically, the more a "historical" film presents life in the past as similar to life in the present, the more believable it is to these students, (Seixas, 1993, p. 364).

Seixas's work is considered a turning point in the modern study of movies and students' comprehension of the past. Not only did it provide a fascinating cache of empirical data, it helped to legitimize for a new generation of researchers the use of film as a valid focus of study within history education. Seixas's study underscores the power and peril of Hollywood movies as tools for the teaching of historical literacy. Students at once related to movies as legitimate historical documents, taking them seriously in the composition of their historical knowledge, and simultaneously failed to deal with them adequately as such. Similar observations have since consistently been made in other studies (cf. Afflerbach & VanSledright, 2001; Marcus and Stoddard, 2007; Metzger & Suh, 2008; Meyerson and Paxton, 2006; Paxton, 2002; Stoddard, 2009).

Teacher Practices with History Films

How teachers actually present movies in the history classroom and how these pedagogical practices might serve to build or inhibit the development of content knowledge and the skills of historiography are perennial questions about which little is in fact known. Classroom lore holds that history movies are often employed as time-filler or as passive educational time-outs for students. Whether true or not (and there is scarce research to say one way or another), these stereotypes have been around for decades: "Friday was usually movie day. What could be more perfect for teacher and students alike than a cinematic experience to celebrate the closing of a tedious week of education?" (Maynard, 1971, p. 3). The notion that movies should be employed as legitimate historical texts for students and teachers to interrogate within the framework of the discipline certainly flies in the face of such received lore. That movies have been associated, fairly or unfairly, with teacher incompetence or even negligence may erect a professional and social roadblock for the history teacher, who in effect may be inhibited from employing one of the main vehicles of student engagement with the past.

Unfortunately, what studies do exist on how teachers actually use movies in their classrooms are far from reassuring. After years of informal observation in one school district, Hobbs (1999) underscored five categories of film misuse, including showing movies or television shows without the opportunity for discussion, critique, questions, or review; teachers who mentally disengage during "movie time" in order to do "real work" like grading or attending to personal

business; and teachers who use film as a reward or classroom management device to keep children quiet and under control. Effective film use in history classrooms has been associated with frequent pauses for discussion, explanation, and context setting, along with parallel reading assignments and activities, and so on (Marcus, Metzger, Paxton, & Stoddard, 2010; Matz & Pingatore, 2005; Russell, 2012). However, less effective teachers may make scant use of such scaffolding pedagogical practices. Surveys of movie and documentary film use in history and social studies classrooms were fairly common during the early decades of research, leading to extensive lists of movies shown in schools (Richardson & Fisher, 1999).

Recent comprehensive surveys of movies used in history classrooms, and the nature of this use, are nonexistent. However, a narrow survey by Marcus and Stoddard (2007) does offer a tantalizing glimpse of contemporary history classrooms. This research focused primarily on the use of commercial motion pictures, with some questions concerning documentary films. Using a convenience sample of 84 secondary U.S. history teachers from Wisconsin and Connecticut, the survey posed a series of questions asking, among other things, what films teachers use in their classrooms, how they use them, and their attitudes toward showing movies in school. One thing strikingly clear is that these history teachers not only use "Hollywood" movies in their courses, they use a lot of them: 75% reported using some portion of history movie footage either every day or a few times a week, while only 5% reported using movies once a month or not at all. Use of documentary film was also high, with 82% reporting they showed these at least once a week in their classes, with overall documentary film use actually less than the use of commercial motion pictures.

Teachers in these classrooms showed all or parts of 169 different commercial motion pictures, including a broad spectrum of genres, historical events, peoples, and contexts. They reported few barriers impeding movie use in the classroom. Not surprisingly, the teachers surveyed had positive attitudes toward movies screened in history classes, indicating that they help motivate students, aid in the learning and understanding of course content, and promote connections of historical content to students' lives outside school. The main purposes for presenting movies in the history classroom were three in number: providing subject matter content (35%), the development of empathy or bringing a subject or time period to life (35%), and serving as a "grabber" to motivate interest in a topic or lesson. Marcus and Stoddard (2007) note teachers often show movies to "fill in the gaps" in the typical textbook march through U.S. history. The most commonly cited movies in their survey addressed marginalized or under-represented peoples or introduced alternate perspectives not found in typical textbook accounts of the past.

The results of Marcus and Stoddard's (2007) survey must be viewed cautiously, of course. Apart from the relatively small sample size in two singular geographical areas, the nature of the convenience sample raises the possibility that the population returning surveys may introduce sampling error—that is, those who went to the trouble to fill out and send in surveys may have been predisposed to greater film use and generally have had more positive attitudes toward showing movies in the history classroom. Of note, the nonacademic practices that Hobbs

(1999) equated with misuses of film accounted for only 2% of responses. This is perhaps not surprising, for despite the anonymous nature of the survey, subjects were describing their own practices as teachers.

A series of recent studies underscore the decision-making dynamic teachers engage in when selecting movies and teaching techniques in Australian classrooms, as well as students' reactions to classroom film use (Donnelly, 2013, 2014, 2016). Using surveys, interviews, and targeted case studies, this research illustrates the complex interplay of school context, teacher pedagogical knowledge, and disciplinary understandings in this decision-making process. In contrast to Marcus and Stoddard (2007), Donnelly notes that in Australian schools significant barriers still exist to the use of movies in history classrooms, including traditionalist attitudes that regard movies as entertainment (not education), high-stakes test cultures that may not align with multimodal approaches to teaching, and the difficulty of finding "appropriate" or "suitable" movies when so many are technically rated for adult audiences (Donnelly, 2014). Even when appropriate movies are available, teachers are often not well trained in their use. Indeed, only 8% reported their teacher training programs offered formal training in film pedagogy. "The data indicated that many teachers who were confident with printed source analysis and interpretation were less comfortable with investigating film as an historical artifact" (p. 23). These barriers aside, the teachers report making extensive use of movies for some of the same reasons identified by Marcus and Stoddard (2007), including the desire to bridge perceived gaps in textbook renditions of the past. This inclination to film use in the history classroom is validated by recent neuroscience research which confirms the importance of multimodal presentation and engagement, of insightful problem solving, and of affect in learning (Donnelly, 2013).

That teachers make widespread use of documentary films, now often freely available online, is also no shock. Documentaries have traditionally been seen as safe, objective, and produced with an eye toward instruction as opposed to persuasion. This popular stance has been flipped on its head by modern scholarship on the topic, which views documentaries as another genre of historical film text with perspectives to be critiqued, analyzed, and interpreted (Hess, 2007; Marcus & Stoddard, 2009; Stoddard, 2007, 2014; Warmington, Van Gorp, & Grosvenor, 2011).

The notion of documentary films as "balanced" or "objective" is disputed by documentary filmmakers themselves, who often do not hide their purposeful agendas when asked (Hess, 2007). Of course, many documentary films do fabricate a veneer of historical objectivity through the use of such devices as an apparently omniscient authoritative narrator, skillful editing, and mood-affecting music. Teachers themselves may unintentionally reinforce this "History Channel Effect" by portraying documentaries as accurate and trustworthy, failing to ask their students to adequately critique documentary films (Stoddard, 2009/2010). As Hess (2007) points out, the best documentary films are powerful and interesting not because they lack a perspective but because of the strong perspectives they promote. In short, documentary films take their place beside a host of other filmic historical documents, where the line between fact and fiction can often be in the mind of the beholder (Lundberg, 2011). One study noted that high school

history students had a hard time ascertaining the perspective of a film if it aligned closely with their own (Stoddard, 2007). It was only when these students disagreed with a movie's point of view that they could distinguish the film's historical perspective.

Most history teachers make use of a wide variety of audiovisual products, including "Hollywood" movies, documentary films, docudramas, old-fashioned newsreels (now available online), and internet-based products (Donnelly, 2006; Marcus & Stoddard, 2007). Many history teachers have been encouraged to use movies in their classrooms throughout their training and careers, offered advice on best pedagogical practices as well as lists of specific movies to teach particular historical times and topics (c.f., Briley, 2002; Johnson and Vargas, 1994; Kraig, 1983; Matz & Pingatore, 2005; Marcus, Metzger, Paxton, & Stoddard, 2010; Russell, 2007). Exactly what effect movies have on the historical understanding of students is a pertinent and frequently asked question. However, it is a multifaceted question that remains difficult to answer comprehensively, not least because students are diverse and it would be a mistake to assume that there is a single answer to this fundamental question.

Social Identities and Trustworthiness of History Films

Race and religion play a central role in shaping people's understanding of the past (Rosenzweig & Thelen, 1998). Written historical texts are to some sizable degree socially and culturally comprehended (Porat, 2004). The same can undoubtedly be said of movies, no matter the cultural background of the students under research. For example, one study looked at a group of African American adolescents watching and discussing a movie about the Black Panther movement at a community center in the Midwest (Dimitriadis, 2000). Another compared 13 European American students with 13 Native American students as the two groups engaged in a historical problem-solving exercise involving excerpts from two movies and a textbook passage as well as primary and secondary source readings on the topic of Westward Expansion during the late 1800s (Meyerson & Paxton, 2006). These two studies are quite different in many ways, including the research methodologies they utilized and many of the results reported. However, a couple of connections can be drawn when it comes to students' understanding of history and history movies.

Both the African American students observed by Dimitriadis and the Native American group studied by Meyerson and Paxton were skeptical, to say the least, of the historical knowledge offered in traditional school settings, in particular textbooks. The same cannot be said of the largely Anglo-American students in the later research or in many other studies (Marcus, 2005, 2007; Wineburg, 1991), who tend to express great trust in their textbooks and in their teacher's interpretation of history. In both of these studies, culture and societal context played a fundamental role in the "reading" of the movie texts, with each group of students displaying sociocultural sensitivity to the interpretive stance adopted by the movies (Dimitriadis, 2000; Meyerson and Paxton, 2006). Adolescents' racial identity and personal experiences tend to influence their efforts to make sense of the past and shape the manner in which they interpret historical events, people, and primary sources (Epstein & Shiller, 2005).

An analogous phenomenon was noted in a year-long study of two high school history classes in the Northeast United States (Marcus, 2005), leading the author to identify three key factors contributing to the ways students make sense of history movies: teacher practices with film, students' personal background and experiences, and the nature or attributes of a specific movie. This research is notable not only for its longitudinal nature but also for its focus on two teachers with vast classroom experience and a wide array of pedagogical practices highlighting movies as historical documents. Forty-eight students took part in the study, of whom 48% were female and 49% self-reported being non-White. A total of 10 different feature films were used over the course of the year, and data collection included repeated surveys, interviews, and in-class film assessments, generating both qualitative and quantitative data.

The students did not generally rate movies as "trustworthy" historical documents, although these ratings rose toward the end of the school year. Students were also asked to evaluate the historical accuracy of movies, ratings that varied greatly depending on the film. The most common variables listed by students in their judgments of trustworthiness and accuracy were the extent to which the movie corroborated information from other sources or past experience, whether the movie was based on real events and/or people, if the movie was perceived as providing useful information, and the sophistication of production techniques. The two teachers in this study made use of many and varied teaching methods in an effort not only to show the movies, but to present them as historical documents and encourage students to contextualize and critique them as such. Nevertheless, about 22% of the students were judged to view the movies passively and almost two-thirds appeared to offer little critical analysis (Marcus, 2005).

The impact of movies shown to adolescent students can be overt or discreet, as was demonstrated in a pair of studies described by Marcus, Paxton, and Meyerson (2006). In the first, two classrooms in California were scrutinized during the course of a unit on World War II that made use of textbooks, photographs, voice-recorded speeches, documentary films, and short clips from eight commercial motion pictures. The two-week units were observed and videotaped, and teachers and a cross-sample of students were extensively interviewed. Students in these two classrooms held their teachers and textbooks to be highly trustworthy as historical sources, and the same can be said for documentary films (Marcus et al., 2006). The series of Hollywood movie clips shown as part of the unit were judged—and rather emphatically—to be untrustworthy historical documents during interviews with students. However, student actions did not always abide by these words, as they tended to view the movies uncritically and made use of information gleaned from the movies in class discussions and note-taking assignments without proficiently analyzing them as historical sources.

Marcus, Paxton, and Meyerson's (2006) second, laboratory-based study painted this phenomenon in perhaps more stark terms. Eight students from Eastern Wisconsin, divided into two matched groups of four, engaged in a historical problem-solving task to read a collection of primary and secondary texts (including a textbook excerpt) while "thinking aloud" and then responding to an essay question. Only one of the groups commenced the task by viewing two

edited movies. Think-aloud statements were placed into discrete categories. Following the writing task, students read aloud and responded to questions about their essays and the problem-solving task as a whole.

Overall, students in the movie group made more and qualitatively different think-aloud comments while reading the three different historical texts than students in the no-movie group. Students in both groups rated movies lowest in terms of their trustworthiness as historical documents. However, content and ideas from the movies made their way into the problem-solving essays of the movie group. As in the work of Seixas (1993), the essays and post-essay interviews of students in the movie group echoed the interpretive framework of the movies, bouncing them off the *zeitgeist* of modern times. Students rated the movies poorly as historical sources yet then proceeded to make considerable use of them in their essays and interview responses, suggesting a subtle power of movies to seep into the thinking of adolescent students. This echoes the findings of Marcus (2005, 2007). The students also said the movies were thought-provoking and motivating, which of course are key reasons many teachers choose to show them in the first place (Marcus et al., 2006).

Perspective and Empathy in Historical Films

Encouraging the development of empathy for historical peoples and events has been a continuing theme of research in history education over the past few decades (Ashby & Lee, 2001; Barton & Levstik, 2004; Wineburg, 2001). Various models for developing historical empathy in the minds of students have been proposed, including attempts to encourage attitudes of “caring” or “perspective recognition” or “perspective taking” (Barton & Levstik, 2004; Davis, 2000). Movies, with their power to evoke an affective response and present alternative narratives, would seem to be a natural pedagogical tool for this task.

Stoddard’s (2007) case study of a ninth-grade history classroom is a thick description of one teacher’s attempt to develop empathetic perspectives toward the topics of Nazi fascism and the Holocaust. Using daily observations, student surveys, teacher and student interviews, student work samples, and other classroom artifacts, Stoddard developed both quantitative and qualitative data to look not only at the affordances offered by the use of film but also at potential drawbacks. The latter included the possibility that movies may encourage students to develop naïve understandings, overly simplify historical context, or promote “presentist” perspectives (viewing past peoples or events through the lens of present-day attitudes). The unit described employed two feature movies and two documentary films, along with other more traditional written texts. Classroom activities were used to encourage an understanding of historical content, but also in an attempt develop empathetic attitudes toward many of the peoples who lived through those historic times, and not only the victims of fascism and the Holocaust.

Stoddard (2007) concluded that the feature and documentary films, in combination with particular classroom activities, served as powerful tools for developing empathy that “engaged students in recognizing the perspectives of the perpetrators, bystanders and victims of the Holocaust as well as some of those

who resisted" (p. 211). This was achieved, among other things, by engaging students in activities that called on them to interpret and discuss the movies both orally and through essays, making moral and analytical judgments. Of note, it was considered especially important that the teacher was explicit with students about the use of historical literacy applied to these movies, in particular the need to avoid relativism and presentism, and examine the Holocaust within its historical context.

The goal of engendering historical empathy in the minds of students is no doubt important to many teachers struggling to engage young people in what to them must seem the ancient past. However, when teachers target broad, affective objectives such as empathy or caring, learning outcomes can themselves occupy a broad spectrum. Surprises, complications, and tensions await teachers who choose empathy as an explicit learning objective. In Metzger's (2012) case study describing a secondary school Holocaust unit centering on the movie *The Pianist*, some students took feelings of empathy to unexpected places—conflating anti-Semitism with all forms of racism or drawing oversimplified parallels to the present from complex historical events: "That these students' conclusions were so broad as to almost overlook historical context altogether suggests it may be difficult for teachers to appreciate or control the extent of the emotional, visceral influence of movies" (p. 405).

Employing movies as a scaffold to foster student empathy for peoples and events in the past has been substantially addressed in recent years (Metzger, 2012; Stoddard, 2007, 2009/2010). Other topics that have been frequently emphasized include using movies to prompt the recognition of multiple perspectives on history (Justice, 2003; Marcus & Stoddard, 2009; Metzger, 2005, 2007; Stoddard, 2009/2010); to teach controversial issues past and present (Hess, 2007; Stoddard, 2009); to nurture citizenship education (Russell & Waters, 2010; Stoddard, 2014); and to assist in the complex task of presenting movies as legitimate historical documents that are open for interrogation (Briley, 1990; Marcus, Metzger, Paxton, & Stoddard, 2010; Metzger, 2010). The vast majority of this research is qualitative in nature and, notably, none of it puts a primary focus on the results of standardized test scores.

A rare departure from the general trend toward more qualitative or mixed-design studies in the modern research literature nevertheless reinforced the message of historical film literacy (Butler, Zaromb, Lyle, & Roediger, 2009). Using a 3×3 mixed factorial design, Butler et al. presented two related experiments pairing historical texts with movie clips that contained information the researchers deemed either accurate or inaccurate, with two of the conditions featuring text and movies (in reverse order) and one a text-only condition. Fifty-four undergraduate subjects were either given a specific warning, a general warning, or no warning at all about misinformation in the movie clips.

Results showed both the promise and the peril of using popular film to enhance the learning of history. Subjects in both of the text-movie conditions displayed significantly better recall of accurate information than those in the text-only condition in a cued-recall post-test administered after a one-week interval ($p < .05$). However, it is unclear if this enhanced recall was the result of the medium of movies itself or because "facts presented twice were better remembered than

those presented once" (Butler et al., 2009, p. 5). Butler et al. (2009) also asked subjects in a brief questionnaire how interesting they found the text-movie sequences, seeking to gauge the century-old notion that movies motivate in a way that "plain" text does not. If films do increase interest, then subjects should have rated texts as more interesting when an associated film clip was shown, as opposed to the text-only condition. Results indeed indicated that, compared to interest ratings for the text-only condition, interest ratings were significantly higher for texts in the two text-movie conditions. In addition, subjects in the no-warning and general-warning conditions were significantly more likely to produce misinformation on the post-test than the student subjects in the specific warning condition, regardless of the order of the text-movie sequence. The authors called this a "misinformation effect." In other words, giving a specific and contextualized warning about misinformation in a movie immediately prior to its showing proved far more effective than warnings that were generalized or no warning at all.

In sum, movies can raise interest and increase motivation in a subject area that is often sorely in need of these traits. On the other hand, movies can also be sources of misinformation and bewildering complexity that can be difficult for students to understand. Dilemmas such as this make the use of motion pictures in the classroom an apparently perpetual challenge for teachers and a perennial area of interest for researchers—even after a century of cinema in schools.

Conclusion

This discussion and appraisal of research on teaching history with film media should make obvious, if nothing else, that this is a large and enduring field of scholarship. Why so much interest in this topic over such a sustained period of time? Simply put, this is a matter of unique importance to students and teachers of history living in societies saturated by media. Students today ingest a huge assortment of historical media delivered on an ever-growing number of devices. "Hollywood" movies, documentary films, docudramas, miniseries, internet videos, and the immense world of historical video games (which often contain cinematic elements) are viewed at home, in theaters, in museums, in class, on televisions, on traditional and tablet computers, and on smartphones. It is indeed a complex world young people are inheriting, a world far different than that faced by those who first gazed at those silent docudramas a century ago. Today students' need for historical "literacies" extends far beyond text or even movies.

Historical film literacy is a branch of the larger field of media literacy, and it is within this broader framework that much of the recent scholarship on teaching with film media takes its place. While the proliferation of media made possible by modern technology undoubtedly gives credence by itself to calls for increased media literacy in the social studies, within the discipline of history film literacy holds a singular importance rivaled only by text. Much of what people today (and not only the young) think they "know" about the past they have "learned" from audio/visual media. Furthermore, historical knowledge is often handed from generation to generation as families gather around our modern version of the

campfire—the television. Therefore, it is very reasonable to argue that history teachers are more than justified in making intellectually robust use of media, in all their sundry forms, during class instruction time.

The line of research examining how students understand the past through film and what makes for effective movie-based pedagogy is now a century old, but it is far from exhausted. This statement is assured by a number of factors, including the proliferation of new technology, new media, and new or revitalized genres of historical film. Take, for example, the once-humble docudrama—a more or less moribund category of movie at one time mainly confined to the classroom, now reborn and even reimagined on a vast array of cable television stations and web portals. The hokey, black-and-white docudramas of yore have been superseded in the past decade by big-budget recreations of the past that cleverly splice live actors, expert commentary, and awe-inspiring scenery, much of it computer generated. It is within this dramatic, and seemingly authentic, melieu that many now learn about the Vikings, ancient Rome, or the "Founding Fathers" of the US. Modern educational research has yet to address the contemporary docudrama. New technologies have served to broaden and proliferate the ways modern humans interact with the past. For example, history-based podcasts now have a substantial following on the internet. YouTube and other web hosting services provide viewers a diverse palate of history products, both traditional and "alternative" narratives and analysis of the past. These new and evolving technologies and modes of presentation offer an interesting field of inquiry that is yet to be trod upon by educational researchers.

Current deliberations in the field of history education also, as always, provide potential direction for new research on film and history. How can film be used more effectively to develop students' historical literacy skills across the grade levels? What are the strengths and limitations of using film media to teach "difficult" or "dangerous" history—controversial or divisive topics that might create tension among students, parents, and administrators and that are often eschewed by bland, committee-approved textbooks (Hess, 2009; Ravitch, 2003)? How does film broaden and/or bracket the way we examine issues of race, gender, and class in society? How has the commercial nature of film media contributed to or obstructed these discussions? How can teachers more effectively assess student learning with and through film? How do movies fit within "flipped" or online classes? Finally, there tends to be an emphasis on U.S. or Hollywood films in modern educational research. Films from many nations can be used to provide additional perspectives, ideas, and styles. Researchers should give greater consideration to how teachers can use international film—including subtitled movies—to teach history.

This chapter provides a historical overview of research on film media and history education. Studying history with and through film is a field of scholarship that is well established yet far from saturated. The sophistication of film media today, the volume of viewing by young people both inside and outside school, the broad agreement among history education researchers that schools should offer multiple perspectives on history—all these factors create the need to better understand the relationship between film media and the teaching and learning of history. From *The Birth of a Nation* in 1915 to *Straight Outta Compton* in 2015,

much has changed in media industries and the world. New historical perspectives and narratives compete in society and in the minds of students in classrooms and, with the help of technology, almost everywhere else. To give short shrift to this important facet of modern life, or to ignore it altogether, would be a terrible abdication for the field of history education.

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23

Digital Simulations and Games in History Education

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Digital simulations and gaming are two of the most intriguing technological applications in history education today. Each of these digitally mediated tools can take advantage of the best of technology and the discipline of history. They represent an actualization of the promise of technology in history education that many (including authors of this chapter) touted in the heady early days of the web (Mason et al., 2000). Technology promised much then, and as is often the case with prophecies, there have been disappointments and surprises.

On the side of disappointment, the development and implementation of technology hardware and infrastructure have lagged behind what many expected (Enyedy, 2014). Similarly, despite the emergence of structured frameworks on how teachers might use technology in their teaching, specifically the Technological Pedagogical Content Knowledge (TPACK) model for integrating technology into teaching (Mishra & Koehler, 2006), teacher practice using technology in history has likewise lagged (Friedman & VanFossen, 2010). On the positive side, access to information and each other online is far beyond what we expected, and these changing conditions are having deep and lasting effects on education (Beetham & Sharpe, 2013). Perhaps most importantly, advancements in learning sciences have helped educators better utilize technologies to support students as they learn history and have refocused the discussions about using technology in teaching and learning (Staley, 2015). In this chapter we seek to examine the way that two potential learning constructs—games and simulations under the aegis of digital history—have the potential to shape historical thinking in the coming decade.

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A Digital Generation

It is abundantly clear that teenagers use electronic technology devices to a large degree. A recent study showed that "92% of teens report going online daily—including 24% who say they go online 'almost constantly'" (Lenhart, 2015, p. 2). Lenhart reported that this phenomenon is facilitated by access to mobile devices, noting that "91% of teens go online from mobile devices at least occasionally" (p. 2). It is important to consider what teenagers are doing while using these devices and how, if at all, this has impact on their learning. In addition to demonstrating teenagers' propensity to use the internet, particularly through mobile devices, recent research has also shown that almost all teenagers with access play video games. Lenhart et al. (2008) reported almost 10 years ago that video game activity had reached almost ubiquitous levels with "97% of teens ages 12–17 play[ing] computer, web, portable, or console games" (para. 2). With the emergence of mobile technology devices over the past decade, students have even more access to digital games; this drove growth in the industry of 10% per year between 2009 and 2012 (Entertainment Software Association, n.d.) and propelled an industry sales record in 2015 (DiChristopher, 2016).

Although the use and development of digital environs for historical learning have been growing over the past decade, they still remain very much in infancy as a pedagogical technology. Similarly, public attitudes toward digital learning, specifically gaming, are uncertain and complex (Duggan, 2015). Together games and simulations represent approaches to using technology in history education that highlight the potential to yoke historical imagination to historical understanding (Lévesque, 2008).

Wright-Maley (2015a) helps to provide criteria for differentiating games and simulations as concepts. He argued that games have clear victory conditions, specific obstacles, goals, and progress feedback, especially in relation to other players (often mediated by points), and an emphasis on "entertainment over realism" in the design of the play-system, if not in their pedagogical implementation (p. 72; see also Young, et al., 2012). Young et al. (2012) also add to their definition a facet that is helpful for further defining the kind of games we are interested in pursuing for history learning, what they call *learning games*. Learning games should help students to delve deeply and meaningfully into the discipline in ways that "put players in touch with what is fundamentally engaging about the subject" such as "puzzling over the motives or needs of different historical actors, and pondering cause and effect" (p. 32).

Crookall (2010) pointed out that simulations and games have yet to be differentiated clearly. Scholars have disagreed about whether they are in fact conceptually distinct (Tobias & Fletcher, 2012; Young, et al., 2012). As Wright-Maley (2015a) pointed out, the search for a clearly delineated distinction is impracticable given the overlapping nature of games and simulations in form because many simulations have gaming elements and many games have simulation elements. Perhaps more important is the extent to which they serve particular purposes. Wright-Maley (2015a) laid out the functional aspects that all social studies, and therefore all history, simulations should meet to be considered simulations: They should "perform as dynamic, participatory, reflections of real human processes

or phenomena" (p. 72). That is to say, simulation participants should be engaged in the activity wherein their actions and decisions are consequential for the outcome(s) of the activity; this dynamic process is mediated pedagogically by the instructor to guide participants to better understand the complexities of the real-life systems, processes, or phenomena that are the subject of inquiry.

Theoretical Framework

Sam Wineburg (2001) described the underlying assumption that guides the disciplinary approach to history education today—that history is not just "what happened" but rather the processes through which we come to understand and make sense of what happened (p. ix). In the years following, scholars have begun to unpack this assumption, and work toward the formulation of systematic ways with which to articulate and instantiate the practices of history in social studies classrooms, and to conceptualize for teachers and their students ways in which the teaching of history might be refocused on the processes of constructing historical understanding rather than simply conveying the outcomes of commonly accepted narratives. We turned to a recently published book on the topic of historical understanding for inspiration as we sought to make sense of the vast body of historically oriented games and simulations. Using Peter Seixas and Tom Morton's (2013) *The Big Six Historical Thinking Concepts* as a conceptual framework better enabled us to highlight areas of promising practices as well as point to challenges or obstacles related to the use of historical games and simulations.

Seixas and Morton (2013) articulated the conceptual approaches that underlie processes of historical thinking as a disciplinary way of knowing history, positioning historians, and by extension history educators and students, as a broad "community of inquiry" (p. 2). The process by which we come to understand history is necessarily investigative and creative. The stories we generate about history through the processes of disciplinary inquiry are neither contrived nor "fully formed in an already coherent and meaningful story, ready to be 'discovered' by the historian" (p. 2). On the contrary, those interpreting history in order to make sense of the past work to draw coherence and meaning from an infinite and disorderly past.

Seixas and Morton (2013) identify six concepts that constitute historical thinking, including historical significance, evidence, continuity and change, cause and consequence, historical perspectives, and the ethical dimension. These interpretive lenses help to frame different—though not necessarily exclusive—approaches to formulating understandings of the past (and, importantly, in evaluating the narratives we tell about the past). Moreover, *The Big Six* provides a framework that we find useful for considering how digital games and simulations are impacting history learning.

In light of our use of this lens to conceptualize gaming and simulation, it is important to note our belief that the engagement of learners is an insufficient rationale for incorporating digital technologies into the history classroom. On the contrary, in order for digital environs to serve a meaningful and clear purpose in the teaching of history, we need to begin to articulate the extent to which

these pedagogical tools do (or could) serve to illuminate the disciplinary processes that underlie the construction of historical narratives by immersing students in these environments. In the next section, we review recent trends related to history learning and specifically the emergence of digital history prior to considering how games and simulations build on these developments enabling new ways of teaching and learning in history.

Digital History: A History

Edward Ayers (1999) helped define an emerging field of digital history with two seminal essays, arguing that nonlinear hypertext and participatory historical analysis might someday remake the discipline of history (Turkle, 2011). Today scholars, researchers, teachers, and students in history have access to a remarkable range of previously inaccessible resources and are doing history in ways unimaginable just two decades ago (Staley, 2015). The wide availability of digital historical resources has expanded opportunities for conducting historical research and democratized the research process (Cohen & Rosenzweig, 2005).

Digital history is the study of the past using a variety of electronically reproduced primary source texts, images, and artifacts as well as the constructed historical narratives, accounts, or presentations that result from digital historical inquiry (Ayers, 1999; Cohen & Rosenzweig, 2005; Seefelt & Thomas, 2009). Digital historical resources are typically stored as electronic collections in formats that facilitate their use on the World Wide Web. These resources differ from nondigital materials in several ways: digital historical sources are accessible in massive quantities, are malleable and searchable, often include an organizational strategy related to the content of the collection, and may result in the construction of new types of nonlinear narratives (Cohen & Rosenzweig, 2005; Lee, 2002). Most importantly, digital historical resources are unique in that they provide access to previously unavailable materials and new contexts for utilizing and analyzing historical materials.

Given the complexities inherent in using large web-based digital historical collections, digital historical resources offer pedagogical and methodological advantages over traditional historical resources (Cantu & Warren, 2003; Cohen & Rosenzweig, 2005; Koehl & Lee, 2009), including new opportunities for inquiry learning (Saye & Brush, 2005) and the development of new literacies (Kist, 2005). Access to historical materials also has enabled teachers to begin thinking about historical inquiry in ways that were not possible prior to the web (Hicks, Doolittle, & Lee, 2004). The availability of digital historical resources offers scholars at all levels opportunities to test various historical interpretations and theories (Thomas, 2004) as well as to connect their arguments to evidence and give the reader a greater deal of autonomy (Rosenzweig, 2003).

Digital history is a rapidly maturing construct that describes processes for historians and students of history to develop dispositions, skills, and content knowledge in the discipline of history (Ewing, 2009). It includes new processes for digitizing, organizing, and accessing historical materials, conducting historical inquiry, and presenting the results of historical research (Vajcner, 2008). Much like the emerging

social history of several decades ago, digital history today offers something decidedly new. Beyond the additive value of online digital historical resources, digital history offers a new way of thinking, doing, and communicating about the past where digital tools are available in an open arena of scholarly production and communication that encompasses new course materials and scholarly data collections while enabling methodological approach framed by the hypertextual power of these technologies to make, define, query, and annotate associations in the human record of the past (Cohen et al. 2008; Seefeldt & Thomas, 2009). In some ways, digital history has democratized the research process, wiping away the disadvantages of geography and privileged access to archives (Ayers, 1999; Rosenzweig, 2003). Many researchers are in fact already doing much of their work using computers and digital archives (Stephens & Thumma, 2005).

Beyond enabling access to historical resources, the web now allows users to create, analyze, interpret, and communicate about historical ideas and issues. Fueling these new uses are collaborative technologies (commonly termed Web 2.0) that enable not just information sharing but also content generation using a wide range of continually evolving, primarily web-based tools (Boggs, 2007). Cohen (2004) has argued that the discipline of history is primed to move into the world of Web 2.0, which he describes as the "interaction between historians and their subjects, interoperation of dispersed historical archives, and the analysis of online resources using computational methods" (p. 293). In the few years since Cohen's premonition, the field of history has indeed gone 2.0 (Turkel, Muhammedi, & Start, 2014).

At the core of work in digital history is the archival effort to digitize records and relics from the past. Eamon (2005) describes the ways that archivist have used technology to enhance their work as passing through three phases. The first phase focused on the virtual presentation or exhibition of physical historical sources that attempted to recreate online existing exhibits or collections. Soon after, libraries and museums began to present "born digital" collections that featured exhibits and collections in ways that existed only in digital form or for which there was no analog antecedent. The last move was to develop virtual research platforms with "entire virtual platforms of historical interpretation, finding aids and digital collections" (p. 304). Archivists are pushing those boundaries further, digitizing increasingly diverse and even "radical" historical collections (Schwenk, 2011).

Similarly, Mintz describes digital history as evolving through four stages (in Cohen et al., 2008). The first stage included the use of course tools such as email, online syllabi, course management systems such as Blackboard, and content-rich websites such as historymatters.org. The second stage involved the creation of process-oriented online history resources that involve students' inquiring and doing history. Stage three was the move to social and collaborative tools such as Facebook and Twitter. The fourth stage imagined by Mintz is emerging through the use of virtual reality tools. Turkel, Muhammedi, and Start (2014) root the history of digital history in the history of computing, arguing for a closer connection with the technical aspects of the field.

These descriptions of the history of digital history are helpful and in some ways mirror the pedagogical evolution of digital history. When digital historical

sources began to be developed, the initial pedagogical response was to provide instructional materials that enabled students to work with the sources as they might if the materials were offline, but soon new purely digital pedagogical tools began to be developed, ushering in a second phase of development. Tools such as the Picturing Modern America (http://cct2.edc.org/PMA/) project from the Center for Technology and Children, and DocsTeach (https://www.docsteach.org) from the National Archives and Records Administration, enable students to do inquiry and analyze historical materials in uniquely digital and online settings. While these pedagogical tools support student inquiry and the doing of history, they do not enable the creation and digitization of digital historical materials. However, increasingly low barriers to content creation and the availability of creative and collaborative tools have ushered in a new era of digital history pedagogy.

New approaches for teaching and learning history that enable virtual research environments are needed to account for changes in the way historical information is organized, presented, and shared. We know that some social studies teachers are integrating online historical sources into social studies instruction (Hicks, Doolittle, & Lee, 2004). We also know that an emerging body of research is addressing general issues related to accessing and reading information online (Coiro, 2005; Coiro & Dobler, 2007). However, questions remain about how students are accessing and engaging online information in history classes. Specific document-level historical thinking skills such as sourcing, corroboration, and contextualization are pivotal to historical research (Barton, 2005; Wineburg, 1991), but we do not know how these skills are applied when students access and make effective use of online historical resources. How do students and their teachers adapt historical thinking skills when using online historical documents, and, importantly, how do teachers and students learn and apply the digitization and archival skills that are fundamental to digital history? In essence, how do teachers and students experience digital historical thinking?

Digital Historical Thinking

Digital historical thinking takes form around four digital historical constructs: creative digitization, online access to historical sources, multimedia disciplinary tools, and online social networks. Consideration of these constructs helps sharpen our understanding of how students think historically when working in digital environments (Molebash, Lee, & Friedman, 2013). Prompted by the desire for inquiry, creative digitization involves imaginative and novel methods for digitizing, archiving, and presenting historical resources online. The loss of original archival context when historical archives are digitized may limit digitization efforts (Vajcner, 2005), but the innovations resulting from digitization, such as increased access and the searchability of large collections, are net positive (Everitt, 2005).

Access to the source materials of the past radically changes how we might do history. Archival sites recreate the structure of historical materials as they were created. Multimedia disciplinary tools allow students as novices to approach the

discipline through visualizations, multimodal text, and immersive experiences. At their core these technology-enhanced disciplinary tools aim to represent the structures and ways of thinking of the discipline, scaffolding novice learners as they engage with new content. The SCIM-C model is one such cognitive scaffold that supports students as they develop knowledge and practice skills to interpret historical sources in an inquiry (Hicks, Doolittle, & Ewing, 2004). SCIM-C includes five structured phases—summarize, contextualize, infer, monitor, and corroborate—which provide novice students a structure for moving through the complexity of historical source analysis. The social life of information also plays an important role in how students experience historical information.

Collectively, these digital historical thinking constructs, and the practices they engender, owe their practical significance to the craft of historical thinking. The discipline of history has effectively defined and described these constructs, and history educators have become increasingly effective at communicating to novices how these practices are employed (Lee, 2005; Wineburg, 2001). As a result of the theoretical grounding of our discipline, digital technologies are not burdened by having to recreate historical practice and instead can work with the existing constructs to push at the boundaries of what is possible by disrupting and expanding the work that is already being done in the field. Perhaps the two most revolutionary of the emerging new practices are digital simulations and gaming. In the next sections, we review existing research and theory on simulations and games with close attention to the rising impact on history teaching and learning.

Digital Simulations in History

The scholarship on simulations in history education is scant. Ayers (2014) argued that the bulk of research on online simulations is at the university level or within other disciplines such as science. We see this not as a limitation for history education but as an opportunity. Some scholars indicate in their work that digital simulations may provide effective mediums for teaching disciplinary-specific skills, such as those that define historical thinking (Klopfer, Yoon, & Rivas, 2004). Indeed, digital simulations hold the potential to enrich, enliven, and recreate the complexity of the past in ways that other secondary sources, such as textbooks, role-plays, lectures, and videos, may be unable to capture (McCall, 2012). Or, they may be able to serve as more contemporary mediums for comparative analyses such as those that have traditionally been reserved for historical fiction (Köstlbaur, 2013).

McCall (2012) argued that digital simulations may, in fact, lead students through the processes of historical thinking as a function of their immersive and dynamic structures and purposes as learning tools because they are capable of providing students with a palpable sense of context. They provide platforms on which students can situate themselves as actors whose choices lead to different outcomes; in so doing, simulations reveal that history is a process and demonstrate the ways in which the outcomes of the past are connected to the circumstances of the present (Elliott & Kapell, 2013). Because students interact with the past

through simulations that respond dynamically to those interactions, simulations do not represent the history of actual events. Nevertheless, they serve to "model the conceptual frameworks necessary to understand and construct historical representation better than other media" (Peterson, Miller, & Fedorko, 2013, p. 38).

These immersive environments provide dimensional depth to otherwise flat content. Simulations hold the potential to texture content and context with the complexities of human decision making, uncertain responses and repercussions to the resulting actions, and choices between conflicting goods and priorities. In recreating the "fog" and ambiguity within a complex system, they can help us come closer to understanding the thinking processes and actions of historical actors (O'Looney & Dodd, 2006, p. 222; see also Taylor, 2003). Simulations achieve this by trading demonstration for experiential approximation (Peterson, Miller, & Fedorko, 2013). The challenges, decisions, and consequences of students' interaction with history are lived, not merely observed.

Moreover, digital historical simulations become tools of experimentation, as students can return to them repeatedly to determine how alternative decisions might lead to different outcomes. This kind of engagement with the past fractures the apparent inevitability of the present and may help to make the contingencies of the past more salient to students far removed from the events they are studying (Apperley, 2013), making it possible for students to "step into the same river twice, to make meaningful use of counterfactuals, and to learn broad concepts about past events that help explain where the river of our past has been, our current place within it, and to consider where it may be going and why" (Peterson, Miller, & Fedorko, 2013, p. 34). They also can allow students to analyze and predict which variables and conditions were instrumental in helping to determine the course of historical realities (Köstlbaur, 2013). Therein lies the challenge: What is possible and allowable within the contingencies of the simulated system must be plausible given what we know to be true of the context of simulated events and processes (Apperley, 2013).

Slow Progression to Digital

Although we have relatively few examples of research on simulations of a digital nature to draw from, recent technological developments presage how analog historical simulations could be moved to digital platforms or use such platforms to mediate face-to-face interactions in blended formats. Below we offer several cases to illustrate how digital technologies could be used to enhance existing simulations in the history classroom.

Simulations have been a part of secondary history education since the 1960s (Cherryholmes, 1966) but were limited by the nondigital nature of the technical affordances of the time. Today there remain many analog history simulations, and there are very likely more that will be developed in the future that eschew or stymie digitization, but as digital capabilities grow we suspect that there will be a greater emphasis on digital media as a point of development with historical simulations, given that they provide platforms for rich narrative experiences. This evolution is still in its infancy, and it is very likely that its progression will be disjointed.

Cause and Consequence

Williams and Williams (2007) designed an analog simulation called *Ocean Wind* that represented the conflict between Native Americans and Europeans as settlers began to invade and colonize eastern North America. The researchers examined how the participants used their power chips—for competition between indigenous nations or cooperation against the European invaders—across two iterations of the same simulation. Working in groups, students represented different Native American nations during the simulations, while European movements and actions were determined by charts and dice rolls—which could be digitally programmed.

In the first iteration of the simulation, students used the majority of their chips (131/180) in competitive moves (against other Native tribes). Students' points were calculated using charts constructed for simulating outcomes, from which positive or negative scores were determined. The researchers corroborated this data with qualitative observations in 30-second snapshots that captured dynamics of interactions, such as facial expressions and body language, the majority of which were interpreted as aggressive in nature. After each group failed to meet their objectives (each tribe finished with a negative score) students were debriefed, asked to answer a set of reaction questions, and then told they would repeat the simulation in a week's time. The results from the second simulation showed a markedly different outcome. All 180 power chips were used cooperatively (in coordination with other Native tribes against European settlers). Moreover, the researchers reported a mean shift in students' orientations of 99.59 at the time of the pre-test to 112.21 at the time of the post-test from aggression/conflict to peace/cooperation. The effect size between the pre- and post-tests was medium-large ($r = .62$). These markedly different outcomes of the simulation are not intended to presuppose what would have happened if Native nations had responded differently to European incursions, but they do provide an interpretive lens to reflect upon the cause and consequences of the complex interactions between Europeans and Native Americans and the role that inter-indigenous relations may have played in actual historical outcomes.

This simulation also helps to reveal that historical events are mediated by the manifold decisions people make, that a deterministic view of history is rife with problems. In debriefing this simulation, the teacher may also be able to help students to interrogate the ethical dimension (Seixas & Morton, 2013) that this simulation opens up for how humans and societies choose to utilize our relative advantages to uplift or oppress each other. At the same time, the digitization of the European invader may help to assuage some of the concerns scholars have about the use of simulations used to confront students with morally fraught content (see Wright-Maley, 2014).

Simulating Historical Crises

Chapman and Woodcock (2006) describe a simulation they designed to help students think about cause, consequence, and evidence surrounding the events of the 1930s Abyssinia Crisis. Students were asked to research particular countries in order to better understand how their nation tended to involve itself in

international relations. Students were then instructed on how to think about the likelihood that their nation would act in a particular way. At this point they were moved to computers where they were to indicate in each step of the crisis which actions (out of a range of options) were the likeliest for their nation to choose and which were the least likely.

After working through these stages on the lesson's website, students were brought back together to analyze both the choices they made and those that transpired in reality. In this simulation students are asked to employ the historical thinking concepts cause and consequence as well as historical perspective recognition. Such simulations are frequently employed in international relations, as they pertain to ongoing crises that are at the heart of many "model UN" type of simulations (e.g., Wright-Maley, 2015b), but their value can readily be extended into the historical domain. Other such crises include regional conflicts such as those in Latin America in the 1980s (Cleland, 1994), post-World War II China (Lush & Tamura, 1999), Roman-occupied Britain (Moorhouse, 2008), Sudanese civil war, AIDS in sub-Saharan Africa (Wright-Maley, 2015b), or recurring crises in Bosnia, Northern Ireland, the West Bank, and Kosovo (Ghere, 2001).

Although these simulations are not, generally, digital in nature and do not necessitate the use of digital technologies, it is easy to see how they might be made more manageable by using a platform similar to that employed in GlobalEd (Gehlbach et al., 2008; Johnson, Boyer, & Brown, 2011). Their platform enables students to engage with an issue or crisis as a nation or party as a whole class, rather than as individuals or small groups. Doing so could help provide teachers with a greater ability to focus their students' attention on a single national perspective in order to develop a more robust and nuanced understanding of the issue or crisis that can be contextually located in time, place, and worldview. The digital focus is on communicating across digital space with other students' playing other roles in the simulation, which may add a level of verisimilitude to the real world.

Personal Handheld Devices

Colella (2000) conducted a qualitative study in a high school science context on teaching about the spread of disease, which could be readily translated to the social studies classroom context. In Colella's study students wore small computers, which shared information remotely without the students' knowledge, to simulate viral exchange as students came into contact with one another. Over the course of five days, students engaged in multiple rounds of the disease simulation, in which they were denied information but encouraged to "experience and explore the disease simulation for themselves" (p. 480).

Starting on day two, students engaged in collaborative analysis of the results, repeated following each iteration of the simulation. After their analyses were complete, students formulated and tested their hypotheses in subsequent rounds. Among Colella's (2000) findings was the development of students' systematic thinking over time: The first two rounds of the simulation appeared to lack direction as students focused on their personal experiences, but by the time the third iteration began students "agreed on a problem: figuring out how the virus spread

from student to student" (p. 490). From this point on, "students framed multiple problems and executed experimental actions to discover the solutions to those problems" (p. 491) in ways that reflected thinking processes consistent with scientific inquiry. Colella continued tentatively to explain that although this study did not allow her to conclude that "the simulation alone caused students to engage in inquiry, it does allow us to observe that in this environment students are able to define a problem, inquire into its nature, and solve the problem" (p. 491).

Although the particular inquiry in Colella's study was scientific in nature, such models of disease could just as easily be integrated into a history classroom revolving around the Spanish Flu (influenza), AIDS, cholera, or small pox, where students might use primary sources in connection with the spread of disease mediated by the handheld devices to determine the source or vectors of disease. The same technology could be used to help hide vectors of disease that we see in historical episodes such as the bubonic plague (Wright-Maley & Joshi, 2017) to simulate the anxieties and moral tensions caused by unknown—and at times, unknowable—sources. As handheld and wearable technologies become less expensive, these kinds of simulations become increasingly possible to orchestrate (Klopfer, Yoon, & Rivas, 2004) and present increasing opportunities to simulate dynamic processes that are not within the conscious control of present-day or historical actors.

Digital and Nondigital Concordance

In one interesting example, Laura Cruz, then a professor at Western Carolina University, developed an analog simulation which enabled students to immerse themselves in the pre-1914 political climate of Europe; she later transformed her simulation into a digital version (Kelly, 2005). Students were pitted against one another and confronted with actual historical events and challenges, but given the freedom to navigate them to achieve a better outcome for their country than the mutually devastating outcomes of World War I. The online environment simplifies the logistics of the game by keeping track of resources, commodities, and intelligence gathering. In this way the digitized version of the original simulation amplifies what is possible for students to do by freeing them from the cognitive load of calculating logistical details while providing immediate concordance between groups. This platform also provides a means of shielding communications in a way that creates a more robust environment for maintaining what Hedley Bull (2012) described as the anarchical nature of international relations.

It is worth noting that student decision making may (and we suspect often does) produce counterfactual outcomes. In terms of cause and consequence, this is not necessarily problematic. McCall (2011) argued that simulations are not capable of representing historical events accurately in every detail. What is important, however, is that simulations such as this one "*must offer defensible explanatory models of historical systems*" (p. 23, emphasis in original). Others have argued that simulations are relatively poor mediums for conveying factual information (see Bredemeier & Greenblat, 1981; Corbeil & Laveault, 2011; Pierfy, 1977; Randel, Morris, Wetzel, & Whitehall, 1992) but that they help to reveal the

complexity of dynamic systems (see Corbeil & Laveault, 2011; Parker et al., 2011). Cruz reported this to be the case and described how she supplemented the simulation experiences with traditional lectures. In her own assessments of student knowledge two years following the history course reported on by Kelly (2005), she touts a high degree of correct historical knowledge retention (not subjected to peer review, it should be noted). In large part Cruz attributed this counterintuitive finding—that a counterfactual simulation could produce better factual knowledge—to the fact that she observed her simulation students engaging in much more reading and research on their own than those who were not involved in the simulation (Kelly, 2005).

Gaming in History

The pedagogical method of including games in history teaching is not a new phenomenon. For many years social studies teachers have incorporated such commercial games as *Risk*, *Monopoly*, and *Dungeons & Dragons* into their instruction. Additionally, games such as *Jeopardy* and "Trashketball" (a common game in which a student or team of students is allowed to accrue points by throwing a ball into a trash can subsequent to providing the correct answer to a question) often serve as platforms and structures from which to review specific content through gameplay. Social studies scholarship in this area extends back decades: VanSickle (1977) defined that "'game' means a setting in which participants make choices, implement those choices, and receive consequences for those choices in an effort to achieve given objectives" and that "a game is 'instructional' when some aspects of a game's substantive or procedural framework are regarded as worth teaching and learning" (p. 85). Clearly, there is an analog antecedent to the digital games that are now prevalent in developed societies.

The long history of gaming and permeation of gaming in the lives of students raise several questions. First, can the teaching and learning of history be improved, deepened, or extended through gameplay? If so, what games are best suited to help impart specific content to K-12 students? It is then important to consider where these games are being played (at home, at school, or both), and whether intentional instruction and assessment related to games can be used to afford them status in the teaching of history.

Evaluating History in Games

Whitaker (2016) posits that a person "would be hard pressed to find a large public audience as interested in history as video game players" (para. 1). He and a fellow historian produced videos of themselves playing historical games while discussing what was taking place at that time from the historians' perspectives. As a result of the success of these videos, Whitaker argues that there is a potential for overlap between game developers and historians, as "players love historical settings but want to know if these settings are accurate," and further that "we need communicators who are willing to engage the public, but also able to use the 21st-century mediums the public engages with." There is undoubtedly a great

deal of learning potential through this medium, as historians in relationship with the public co-construct the history that gamers experience. Students might be asked to evaluate the accuracy of the history embedded in the narrative structure of games. Likewise, the need for reliable historical narratives within games provides students with opportunities to evaluate historical evidence, continuity and change, and cause and consequence in the design of game-based historical narratives (Spring, 2015) or modifications—known as "modding"—of existing games (Crabtree, 2013).

Utilizing the History in Games

There have been several research studies that examine the efficacy of digital games for teaching and learning in history and the social studies that reveal the potentiality of gaming for learning in these disciplines. Watson, Mong, and Harris (2011) and Senrick (2013) reported on the impact of games in secondary history classes and argued that there were considerable increases in student engagement and ownership over the historical process. Pagnotti and Russell (2012) found in their study of high school students using *Civilization IV* that students were able to readily articulate the consequences that underinvesting in technological development had on their societies' ability to compete with others. In their study of the *Taiwan Epic Game*, situated in 19th-century Taiwan, Shih, Jheng, and Tseng (2015) found that the game "effectively enhance[d] players' cultural awareness" (p. 205). Reynaud and Northcote (2015) report a study of university-level students in Australia engaged in "tabletop wargaming" to better understand world conflicts in the first half of the 20th century (p. 349); participants "felt that they learnt and understood much more detail through the gaming" process (p. 360). It is worth noting that this was an analog game being played in the era of digitization, demonstrating that the mode by which the game is delivered does not necessarily impact student learning; it is the content of the game that can help achieve desired learning outcomes.

Students in Watson et al.'s (2011) study were eager to evaluate their historical paths compared to reality. The use of evidence to do these evaluations may be a particularly important skill for consumers of public history in order to develop a critical capacity to view video games as interpretive objects of historical reconstruction rather than reflections of the world as it was. Dow (2013) argued that historical games often take liberties with the built environments of the times and places they represent, leaving players with a false, or incomplete, sense of the historical environment. Of its own accord, this is problematic, but as an artifact of historical representation the Renaissance Florence represented in *Assassin's Creed II* can be deconstructed and critiqued (Dow, 2013; Gilbert, 2016b). Further, the Assassin's Creed series provides students with rich historical landscapes that enable students to recognize elements of historical life and humanity that may be lost in more traditional forms of historical learning (Gilbert, 2016a). Digital games may also help to situate students to more effectively understand the causes and consequences of human choices within historical contexts.

Similarly, *Minecraft* is wildly popular worldwide. Mojang (2016) reports that over 23 million people worldwide have purchased the game. Its educational

benefits generally have been noted by scholars such as Drzewiecki (2014), who noted that it "gives students the freedom to create, pushing their imaginations to the limit and allowing them to be creative in ways not possible in the real world" and that the game is "inherently about problem-solving." Although this may not seem directly connected to history, gamers have utilized this "sandbox" game to create virtual worlds designed to help students engage in "the discovery of ancient history and geography" of a number of ancient civilizations, including Egypt, Mesopotamia, and Babylon, to name a only a few (Walker, n.d.). Like Florence during the Renaissance in *Assassin's Creed II*, these built environments serve as artifacts that students can interrogate.

Gaming at a Crossroads?

Takeuchi and Vaala (2014) found that 74% of K-8 teachers reported that they played digital games regularly, but only 20% reported using digital games such as those we have been discussing to this point in their classrooms. It is interesting to note, however, that 82% reported using nondigital games in their classrooms. It may well be that gaming in the teaching of history is in a transitional phase. As a generation of gamers become teachers, it seems more likely that gaming will continue to develop in history education: Teachers who are themselves gamers may be much more likely to use gaming as a mode of inquiry than those who are not (Gaudelli & Taylor, 2011; Takeuchi & Vaala, 2014).

We may see a situation similar to the one education experienced in the early 2000s with the growth of the internet. At that time Arafeh, Levin, Rainie, and Lenhart (2002) described a "substantial disconnect" between how the internet was used by students at home and how it was used by them at school (p. iii). In other words, students in Arafeh and colleagues' study utilized the internet as a learning tool outside of school to a larger degree than they did within the confines of the school building. Nearly a decade and a half later, it has been well documented that the internet is used to a much larger degree than previously in schools, and within social studies in particular (Friedman & VanFossen, 2010; Heafner & Friedman, 2008; Shiveley & VanFossen, 2009). As there has been an evolution in the use of the internet in the past decade and a half since its nascent stage, it is possible that digital games may undergo a similar process.

Digital gaming may also suffer from a skeptical audience. In their study of seven social studies teachers, Gaudelli and Taylor (2011) found that although participants acknowledged the "motivational potential" of video games, the teachers "were skeptical about the pedagogic value of these tools" (p. 78). Similarly, Dickey (2015) found that participants were reluctant to integrate mainstream, popular games, what she terms "gamers' games" (p. 493). She pointed out that the features of popular games that are appealing to gamers may not resonate with teachers. This reflects Friedman's and Hicks' (2006) point that it is important to "connect with educational users," and "ask teachers what their questions and needs are" (p. 249). It may simply be the case that many social studies teachers view gaming as too far removed from traditional social studies instruction and may not wish to develop the capacities they need to use games effectively as tools of historical inquiry. In a similar vein, if teachers are unsure of how to

incorporate games in a manner that they feel improves student outcomes or experiences, they may be reluctant to include them in their curriculum. Further complicating the issue, computer hardware and software must be properly licensed, up to date, and free from technical problems. Any of these challenges may render impossible, or nearly so, the efforts of even those teachers who are willing and ready to utilize these tools.

Considerations for the Future of Digital Simulations and Games

Historical simulations and games may provide teachers with tools to accelerate the consequences of decisions in order for students to evaluate the actions of historical actors. They also can place students in environments that have different rules of order that may be alien to the life experiences of students and can make abstract concepts concrete (Valverde, 2008). In addition, they provide students with artifacts that allow them to test assumptions, analyze circumstances, and challenge any presuppositions they may have about the inevitability of the present in relation to the past.

Valverde (2008) provides the example of feudalism to make this point. Students can learn about the concept in traditional ways, but this traditional cognition is very different than that which students need to employ in a simulation where they interact with and learn about an environment and context, make decisions, and can see how the consequences of those decisions manifest themselves in ways that may not be predictable by the students-as-historical-actors. When placed in immersive environments, students may be better able to appreciate the subjective experiences that approximate those of the people who lived in the historical contexts that are the focus of study (Schultzke, 2013). There is a greater complexity of thought required of students that can provide or even necessitate opportunities to think historically.

Digital simulations and games can be utilized not only to help develop the goals that underlie the push toward disciplinary ways of knowing (i.e., historical thinking) but also help to raise big questions historians continue to grapple with. Allison (2008) argued that these approaches "deserve history educators' attention because they not only provide avenues to reconceptualize the past, but also reinvigorate the debate about what exactly is meant by 'the past'" (p. 350). Simulations and games help fracture the inevitable-progress narrative of history, and push teachers and students to question, compare, and consider the representations and instantiations of history as they live it vis-à-vis as it happened in the past.

At the same time, digital simulations may help to resolve two of the most pressing pedagogical obstacles facing student-directed instruction: control and time pressure. It is not uncommon for teachers to struggle with relinquishing the control of the classroom to students in general (McNeil, 1986), but this difficulty extends to simulations, which are inherently chaotic from the teacher's vantage (Wright-Maley, 2015b). Unlike many older classroom-based simulations, digital

simulation may contain student chaos within the confines of the digital environment rather than the physical classroom. This affordance could reduce the friction teachers may feel between pedagogy and classroom management.

Time has been a key obstacle to the use of simulations for decades. Jones (1980) remarked nearly four decades ago that secondary schools were particularly resistant to adopting simulations because of a "general picture" he described as "don't know, don't want to know, too busy" (p. 107). The extent to which simulations are perceived as too costly in terms of time may be mitigated by students' ability to continue their participation with and in the simulation both physically and temporally beyond the classroom, and by the fact that digital activities often require much less setup time (Weir & Baranowski, 2011). This may not, however, be the case with digital games which still require time to learn how to play the game (Gaudelli & Taylor, 2011).

Challenges and Opportunities

Although digital simulations and games may resolve some of the problems posed by analog simulations, digital environs may result in other sources of pedagogical friction; in particular, student monitoring and assessment, the quality of technical systems available to educators, and the technological efficacy or beliefs of teachers all pose new and difficulties challenges. Take for instance the GlobalEd simulations (Gehlbach et al., 2008; Johnson et al., 2011): They require a moderating figure to monitor the communications of individual simulation agents and a team of researchers and assistants to analyze these interactions. While this may be an effective way to assess and monitor student actions, it is easy to see how this setup could prove impractical in typical classrooms. With the use of games such as *Assassin's Creed II* or *Civilization* that lack built-in assessment tools, it may be difficult for teachers to evaluate student learning during gameplay. Furthermore, schools may lack technology infrastructure sufficiently capable of meeting the technical demands of digital simulation (Perrotta & Feinberg, 2016).

We are cautiously optimistic that these new frictions can be reduced, but they remain obvious obstacles to the use of digital simulations and games. Where the technology and infrastructure is available, schools are better able to make use of these approaches. There is, for example, a school in New York City whose curriculum is rooted in gaming which reports that it is "ranked in the ninety-seventh percentile in student engagement across city schools" while "performing at or above New York City public school averages on standardized tests" (Institute of Play, 2017). The degree to which engagement equals student success and achievement remains to be seen, but what is clear is that the infrastructure and technically sound hardware makes it possible for the school to attempt to bridge engagement and learning in ways that the simulation described by Perrotta and Feinberg (2016) never had a chance to.

It may be possible, however, to overcome these technical limitations by way of public infrastructure. The overwhelming majority of teenagers may have access to mobile devices, bring them to school, and use them frequently. It is worth noting that eight years ago Anderson and Rainie (2008) predicted that mobile devices "will be the primary connection tool to the Internet for most people in

the world in 2020" (p. 2). As school districts begin to see this as a positive development rather than a nuisance, they are beginning to take advantage of this situation by developing Bring Your Own Device (BYOD) programs. For example, schools in Winston-Salem/Forsyth County, North Carolina, have developed a program in which students in grades 3–12 are allowed to bring their own devices to school to form what is termed "Mobile Learning Communities," and among the goals of this program is to "leverage the use of digital resources to engage students and extend learning beyond the four walls of the classroom" (Winston-Salem Forsyth County Schools [WSFCS], 2013).

It may be possible to utilize games in instruction in ways that do not always require schools to maintain up-to-date technology and may not even require a physical classroom. Among the advantages of a mobile device is the ability to include quick-loading digital applications ("apps"). An app "allow[s] a user to explore a particular topic or subject in depth from one location (and thus eliminate searching), and therefore have the opportunity go beyond what can typically be found on a web site in regards to concentrated resources on a particular topic" (Friedman & Garcia, 2013, p. 117). This development offers possibilities for the developers of mobile simulations and games for historical inquiry that are new or as yet untapped.

We also know from other technological domains that teachers may be unlikely to utilize digital simulations if they do not feel digital game-based learning (DGBL) efficacy (Takeuchi & Vaala, 2014) or that they may implement them ineffectively (Young, 2004) if they have insufficient training or understanding of the game. Gee (2003) pointed out that in learning how to play (and utilize) games one is required to learn a "new literacy" (p. 13). Clearly, teachers require more familiarity with historical games and training to enact them effectively in the classroom (Allison, 2008; Takeuchi & Vaala, 2014). As Betrus and Botturi (2010) state, a fundamental prerequisite to a social studies teacher integrating games into instruction is that a "teacher should like games or learn to like them before attempting to integrate them into instruction" (p. 50). In other words, when teachers are not gamers, they may not be aware of the educational opportunities that games can provide.

It may also be the case that these approaches may simply conflict with how teachers perceive the appropriate "relationship between digital technologies and teacher practice" in history education (Hicks & van Hover, 2013). Games and simulations necessarily move away from a didactic pedagogical positioning of teacher and student, which can prove uncomfortable or undesirable for some teachers (McNeil, 1986). Along similar lines, there may be relatively few scholars who are interested in pursuing gaming as an area of research—both in history and in education. Metzger and Paxton (2016) pressed this point further, arguing that serious attention may be hindered by a lack of articulated vocabulary for analyzing the interplay between history games and historical disciplinary content. As Wright-Maley (2015a) argued, it is necessary to have an agreed nomenclature upon which to develop common understandings of disciplinary phenomena.

This aversion could occur for a number of structural reasons. First, it may be difficult to find teachers who are utilizing gaming in a robust fashion in order to conduct the research necessary to further the scholars' line of inquiry. Second, the nontraditional dimensions of gaming research might make it difficult for academics

to articulate the value of these pursuits within the prevailing academic reward structure, particularly in regards to tenure and promotion. For example, one influential publisher recently explained to one of the authors of this chapter, that books published on this topic within a single domain (such as "social studies") have not shown themselves to be economically viable. If this is true of other large publishing outlets, it may be difficult for scholars to pursue such research at institutions where the status of the publishing outlet is material in tenure and promotion considerations. Third, if reviewers of conferences and academic journals are uncertain about where this topic fits in regards to acceptance in a mainstream conference or journal, it could be difficult for academics to use this domain of research as a foundation for a burgeoning career. Johnson (2006) argued that gaming suffers from a cultural bias vis-à-vis learning that is both selective and inaccurate. This cultural bias is likely beginning to shift as gamers come of age in the professoriate (e.g., Perkin, 2015), but it would be premature to suggest that it has achieved a level of caché equivalent to other fields of inquiry in history education.

Finally, if student engagement in digital games and simulations is inherently difficult to measure, grant funding may be difficult for scholars to obtain, particularly in this age of accountability which demands measureable (as opposed to qualitatively assessable) outputs of student and teacher performance. Given the trajectory of scholarly interest in this area, these obstacles may not persist (Hwang & Wu, 2012), but they have as yet to be cleared. Together, these potential obstacles in higher education further impede the advancement of history teachers' capabilities in these areas because they lack adequate venues for professional development on the use of gaming and simulations in history education.

When (if) these challenges are overcome, educators can begin to integrate digital simulations and games more readily into the history classroom. However, we must be cognizant of both their limitations and their affordances and be careful not to claim that a progressive trajectory for these media is inevitable. They have the potential to serve as rich complimentary sources of historical inquiry (Bastani, Gupta, & Kim, 2016). Their coherent integration into larger units of study appears to develop a synergistic effect (Parker et al., 2011; Zevin, 2015), whereby traditional approaches to history and the simulation itself are strengthened. To this point, Landriscina (2013) cautioned that the use of simulation necessitates students' having the necessary content knowledge—whether built in to the simulation itself or foregrounded in teaching practices that lead into the simulation—in order to meaningfully engage in the simulation. This conclusion would appear to be supported by research on simulations in the social studies that targeted critical thinking (Parker et al., 2013), but other research (Parker et al., 2011) seems to suggest that the reverse may be true as well. Nevertheless, the effectiveness of simulations in history education is undoubtedly dependent upon the quality of the pedagogy that accompanies their use.

McCall (2011) argued further that only through effective teacher mediation could students learn to effectively interrogate simulations as texts, such that they could become rich sources of analysis and act as tools of comparison between the interpretive representations of history within the simulation and other historical sources of evidence (see also Wright-Maley, 2015a). Used as texts, digital historical simulations provide teachers with tools to engage students in the "unnatural

act" of thinking historically (Wineburg, 2001) in ways that become much more natural or accessible. Inquiry-based simulation/gaming activities position students to confront history through the various conceptual lenses that make up historical thinking: significance, multiple perspectives, continuity and change, cause and consequence, and, to a more limited degree, the ethical dimension.

Conclusion

The seismic shifts brought on by development and advancement of the personal computer and the internet reshaped ways of thinking about schooling. Children are connected to information and each other and have opportunities to work with tools and on virtual platforms that provide powerful new spaces for history. Digital simulations and games are characteristic of these changes. The analog antecedents of games and simulations that were once mostly tangential, just outside the curriculum and reaches of everyday school life, are increasingly relevant for formal schooling as well as informal learning. As digital simulations and gaming and related resources become more prevalent, it is imperative that our field research ways of using them effectively as teaching and learning tools in history education. Given what we know about how students think about history, the way has been cleared in a sense for educators to take seriously the role that digital simulations and games can play in history education.

Teacher education programs will necessarily play a prominent role in the incorporation of digital simulations and games into the social studies classroom. While a function of a teaching-methods course is to prepare preservice teachers to face the immediate curricular, instructional, and management challenges that they will undoubtedly confront during student teaching and initial years in the classroom, another function of teacher education courses is to challenge preservice teachers to think broadly and abstractly about what the future may hold and become leaders in their departments and schools. In this regard, the incorporation of digital simulations and games into social studies teacher education will not only allow preservice teachers to consider instructional design but, perhaps more importantly, help to foster leading their colleagues in this pursuit with the ultimate goal of improving the educational experience for all students. To do so, however, may also necessitate several shifts in the nature of teacher education, including a greater emphasis on design thinking, changes in the articulation of approaches to classroom management, and experiential learning through and critical evaluations of historical games and their use in social studies classrooms.

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24

Learning History Beyond School: Museums, Public Sites, and Informal Education

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This chapter reviews the research on history and heritage education, both formal and informal, that takes place outside of the traditional history classroom walls. First, I explore research on how historic sites, museums, and memorials function as a form of public pedagogy and the implications for history education and history educators. Next, I present research on teaching and learning at historic and heritage sites, including teacher and museum educator development and practice as well as studies of student learning. Finally, I turn to emerging research on the role of mediation and its impact on how visitors engage with sites through new digital media in particular (e.g., augmented reality). Within each of these sections, a particular focus will be on the methodologies and theoretical frameworks employed in the research. I also consider affordances, constraints, and challenges of these methods and the implications for future research. I also use examples from my own research and experience teaching with museum sites and museum educators to illustrate the theme and set the context for each section.

Several questions underpin the search, review, and analysis of literature:

- How do museums act as a site of public pedagogy?
- How are museums and historic sites being used as pedagogical sites for K-12 history education?
- How are teachers and museum educators trained to engage students in historical inquiry at museums and historic sites?

Given the diversity of meanings induced by the terms *museum*, *history*, and *heritage*, I first need to provide a few working definitions used throughout this chapter:

Museum and Historic Site: I use the terms museum and historic site to refer to any place where informal history education can occur. These commonly include museums, memorials, battlefields, preserved houses, living history sites, and

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archives or historical societies. These places can range in size from national museums or landmarks to neighborhood historic buildings or memorials.

History: For this review, I view history as the construction of a narrative or other form of representation built from the "residua" (VanSledright, 2010) of the past. History is always less than the actual past, which can never be fully known or represented. Therefore, while grounded in evidence, history also represents particular voices and perspectives. History is not static but is fluid and evolves as it is challenged and questioned—thus placing an emphasis on history as the disciplinary inquiry approach rather than as a specific body of content (Martin, 2013). Scholarship in this discipline that is produced for, and sometimes with, the general public and outside of academic history is often referred to as *public history*. Public history includes work by historians in museums, archives and libraries, historical societies, and media. They conduct or translate historical research to fit contemporary and public or popular needs and agendas. In this way, museums and historic sites function as a *use of history* (Nordgren, 2016) in that they communicate particular stories from the past using selected artifacts, material culture, and narrative and interpretive elements. It is important to note that this use of history in museums and historic sites, like the school curriculum, has traditionally marginalized some voices and groups by emphasizing elites and nationalistic narratives (Hooper-Greenhill, 2000). Some sites and museums have begun to challenge these narratives by bringing in marginalized voices and histories.

Heritage: Heritage, by contrast, is a cultural process and use of history that emphasizes a particular set of values or cultural identities in meaning making—and in particular the act of passing along these values or identities through meaning making to others within the heritage group (Lowenthal, 1996; Smith, 2006). This meaning making is sometimes grounded in nostalgia, such as that felt by some Britons longing for the days of the British Empire, or more often a use of history intended to connect a group in the present to a particular past. As an effect of globalization and migration, heritage uses of history have grown over the past several decades among immigrant groups in particular—as Lowenthal (1996) notes, "Diaspora are notably heritage-hungry" (p. 9). This includes museums dedicated to particular cultural groups (e.g., Irish American Heritage Museum) or connecting the past to the present through heritage societies (e.g., Ancient Order of the Hibernians).

In the U.S. context, *heritage* is often viewed as related to the identity of those with historic power and to issues of race and oppression in American history. For example, the slogan "heritage, not hate" is used in support of maintained use of the Confederate battle flag as an official symbol in some Southern U.S. states. This justification emphasizes a communication of values and is not grounded in evidence to academic history but is instead rooted in rhetoric, discourse, and narratives that guide meaning making (Smith, 2006). Examining heritage as a discourse in this way illustrates how different groups will construct differing meanings from these communications—as heritage is intended to connect an aspect of the past to a particular group in the present, often for political purposes. For groups not among the intended heritage group, the Confederate flag symbolizes the enslavement of millions of Black men, women, and children and

the long history of segregation and oppression that followed and continues. As Smith (2006) discusses, heritage can be used to promote national consensus around a singular story of nation that benefits those in power—but more often is now used by subaltern groups attempting to force cultural change (e.g., National Museum of the American Indian). Constructions of heritage may lead to similar issues of marginalization as this example's usage in the U.S. context denotes (see, for example, van Boxtel, Klein, & Snoep, 2011).

Informal Learning: Museums and memorial sites around the world have historically served both as initial sites of public education and as sites to set and maintain nationalistic historical narratives. Therefore, I include institutions and programs used for organized school field trips and museum-based activities, as well as those experiences designed for family or other visits to these sites as part of informal educational experiences and educational programming. The primary focus here is on research related to educational programming within the realm of history education in these sites. Other modes of informal history learning, such as through film and video games, are explored in other chapters of this handbook. I also do not include the larger body of research on how young people may learn about history from family members or communities that are outside of the more structured or institutionalized education programs examined in the studies included here. This does not mean that these kinds of informal education are unimportant.

In general, there is a dearth of empirical research on student learning related to history sites; instead, much of the work here is built on science education research that has taken place in science museums and focuses more intently on student learning (e.g., Vadeboncoeur, 2006). Anyone interested in conducting research on teaching and learning in informal educational sites should become cognizant of this literature, the theoretical grounding of these studies (e.g., design-based research, activity theory), and their methodology, but I do not include it here. Although there is a large body of practitioner scholarship, I include in this review only those examples that have the potential for a significant contribution to future research.

Given the diversity of theoretical and empirical approaches in this research, any themes that emerge are based on my analysis and could be presented in a myriad of ways. Given that most of these studies are case studies, pilot projects, or design-based research, I focus often on descriptive findings and theory or methodology, as there is little to generalize or compare at a meta level. Finally, my background as an educational researcher who primarily studies authentic pedagogy and the role of media in teaching and learning history undoubtedly influences my selections of studies to include in this chapter and any analyses or conclusions derived from this work.

Museums and Historic Sites as Public Pedagogy

In several early sessions of my secondary history and social science methods course at William & Mary (Williamsburg, Virginia), I seek to challenge my preservice teacher students' views on the nature of history, how it is warranted and

constructed, and how, as Nordgren (2016) explores, it is *used* in society. Given our location in Virginia's colonial capital now turned tourist attraction, or what Kirshenblatt-Gimblett (1998) would refer to as a *destination museum*, I use in my course the following example of a local historical marker that sits on the edge of campus outside of the provost's office. This office is housed in a building that was once a boarding school for young American Indian men in the 18th century. In 2005 the Virginia Department of Historic Resources placed this marker:

> Using funds from the estate of British scientist Robert Boyle, the College of William & Mary established a school to educate young Indian men in 1697, just four years after the college's founding. To encourage enrollment, in 1711 Lt. Gov. Alexander Spotswood began remitting tributes for area tribes who sent students. Students from tribes outside Virginia also enrolled. The Brafferton was constructed in 1723 to house the school, which provided education in reading and writing English, arithmetic and religion. The American Revolution caused British financial support to cease in 1776, and soon the school closed.

This is a *use* of history in that it is part of a history tourism campaign that represents a very narrow perspective on this example of colonialism in North America (Nordgren, 2016; Seixas & Clark, 2004). However, given the nature of the language in the marker and its "official" history status, it is likely taken as *the* story by most readers. As Nordgren (2016) notes,

> History is used to reinforce feelings of familiarity or as an argument for continuity or change. When we communicate through history it does not generally seem to be about the past, but a way to interact with present needs and desires and thus affect the course of the future. (p. 480)

In this way the marker acts as a form of public pedagogy engaging the visitors in a particular perspective on the history of the Brafferton School. I then present students with the following alternative perspective from a 1744 meeting between Virginia government officials and representatives from the Five Nations, who responded to an offer of educating young Indian men at William & Mary with the following:

> You who are wise must know, that different nations have different conceptions of things … and you will therefore not take it amiss, if our ideas of this kind of education happen not to be the same with yours. We have had some experience of it: several of our young people were formerly brought up at the colleges of the northern provinces; they were instructed in all your sciences; but when they came back to us … [they were] ignorant of every means of living in the woods … neither fit for hunters, warriors, or counselors; they were totally good for nothing. We are, however, not the less obliged by your kind offer … and to show our grateful sense of it, if the gentlemen of Virginia will send us a dozen of their sons, we will take great care of their education, instruct them in all we know, and make men of them. (Drake, 1841, p. 47)

This example highlights the power that historic sites and the use of history in historical markers have as public pedagogy in informing those who interact with official narratives of these sites. These narratives often provide a limited and dominant culture perspective of the story and significance of a site (Lindauer, 2014). This example also highlights the need for teachers and students to engage in developing historical consciousness of how this history is represented and used, what the intended effect is, who the intended audience is, and, perhaps more importantly, what is missing (Seixas & Clark, 2004). This movement mirrors what Lindauer (2014) refers to as "second-wave new museology" (p. 10) within museum studies. This new museology focuses on theory-based rather than object-based approaches to museum studies and more critically on the ways in which museums tell, and often reinforce, dominant culture narratives and histories.

However, the research into how museums and historic sites can engage visitors in developing historical consciousness, either through exhibit design or through educational programming, is almost nonexistent. In one of the few existing studies, Trofanenko (2008) provides a case of emerging historical consciousness in three eighth-grade students who explore representations of Lewis and Clark that challenge the singular narrative approach in most U.S. history classrooms. A new volume featuring scholars focused on sites in Canada and edited by Gosselin and Livingstone (2016) builds from this earlier work in museums and in history education to further conceptualize how historical consciousness may be developed through museum design and informal and place-based history education.

Understanding how museums engage visitors in developing an understanding of the past is an important issue for educators and researchers as these sites serve as key places where adults and families engage in history outside of the school (Segall & Trofanenko, 2014). Several large survey studies provide context for the role museums play as sites where the general population engage with history. Rosenzweig (2000), in a nationwide phone survey of over 800 participants and additional samples of African American, Latina/o, and Oglala participants numbering approximately 200 each, found that 57% of those interviewed had visited a museum within the past 12 months. This is a higher rate than for those who had celebrated a history-based holiday or read a history book. Griffiths and King (2008) also reported that almost 150 million adults in the United States visited at least one museum in 2006 and another eight million adults visited online museums.

Similar trends were to be found in studies in Canada and Australia. In Canada, a large-scale phone survey of over 3,000 participants found that 43% reported visiting a museum, 49% a historic site, and 57% a site specific to their family history in the previous 12 months—these are only surpassed in the survey by those engaging with a history-specific medium such as film, a photograph, or a book (Conrad et al., 2013). Similarly, a large qualitative study of roughly 300 participants in Australia by Ashton and Hamilton (2009) also found that their participants viewed museums as an important and trustworthy site for learning about and connecting with the past.

The level of visitation of museums is only one part of the story; the more important finding from these studies is the role that museums play as a

"trustworthy" source to learn about history. The importance of considering the way history is used and presented at these sites is illustrated by Rosenzweig and Thelen's (1998) finding that museums were viewed as the "most trustworthy" historical source ($\mu = 8.4$ on scale of 1–10) by their national sample of participants and by all groups except for the African American ($\mu = 8.1$) and Oglala ($\mu = 7.1$) participants. These latter two groups also ranked museums as highly trustworthy, but placed them below family accounts ($\mu = 8.4$, 8.8) and accounts from those who witnessed an event ($\mu = 7.9$, 8.0).

Participants from the US interviewed in a study by Falk and Dierking (2000) similarly viewed museums to be more trustworthy than college history professors and nonfiction books, and 87% of the participants in Marstine's (2006) survey found museums to be trustworthy (more trustworthy than books [67%] and television news [50%]). The Canadian survey (Conrad, et al., 2013) similarly found their participants to view museums as the most trustworthy source, with over 60% of respondents, and historic sites as the second most trustworthy source. Respondents in the qualitative study from Australia (Ashton & Hamilton, 2009) reported feeling this trust and connection in part because the material objects in museums are often viewed as relatable to objects in their own experiences or those of their families. Finally, the teachers surveyed by Marcus, Levine, and Grenier (2012) strongly agreed ($\mu = 5.32/6$) that "museums' presentation of content is historically accurate" (p. 83), further supporting how museums are viewed as sources of history by teachers. The challenge of museums as sites of history pedagogy is clear: Students and the general public at large view history museums as trustworthy representations of the past.

This identified need for a different approach to viewing, studying, and teaching in museums—and the role that museums play as public pedagogy—has influenced the fields of museum studies and museum education as well as history education. Castle (2006) argues that everything from curating to museum teaching and the training of museum educators should build from work in curriculum studies. In her study of how museum educators were trained at three Canadian museums, she notes that in addition to content expertise related to the museum, it is important to consider docents', tour guides', and museum educators' "conceptions of learning and learners and the conceptions held by those responsible for training and professional development in informal settings" (p. 128). She notes that museum educators need to develop more complex pedagogical understandings, instead of the relatively simple theories of learning that currently dominate museum education, such as objectivist views of museum engagement or simple constructivist theories such as multiple intelligences.

This need for more sophisticated approaches to museum pedagogy is in part in response to the beliefs that museums serve as trustworthy and even objective presentations of the past. As a result, prominent scholars in museum studies, cultural and media studies, and education have engaged in analyzing and theorizing this relationship between the past, the public, and the role of the museum as a pedagogical space (Ellsworth, 2005; Falk & Dierking, 2000; Hooper-Greenhill, 2000; Kirshenblatt-Gimblett, 1998; Marcus, 2007; Marcus, Stoddard, & Woodward, 2017; Segall & Trofanenko, 2014; Trofanenko, 2006). Their analyses focus on issues of representation, the power relations between museums and

visitors, and the particular forms of pedagogical address in museum and site design. These analyses are also driven by numerous theoretical traditions, including historiographical, aesthetic, postcolonial, and critical.

The theoretical lenses used in these studies are utilized to decipher the stories of museums, their intended effect on visitors, and the opportunities, or the lack of opportunities, for visitors to be actively invited into the construction of these stories. The examples below are a sample from the field that provide specific models for scholars to use to frame research on museums as sites of pedagogy, heritage, and memory. These theoretical traditions recognize the power of museums, their role in society as sites of official memory and history, and the power of curators' choices as to how to tell a particular story and how to engage visitors in these stories. As Hooper-Greenhill (2000) reminds us, museums are one of what she calls the three *technologies of power* historically associated with modernism, with the other two being the census and the map.

Hooper-Greenhill (2000) explains that, as modern sites, museums function as both a form of public education and a medium for maintaining power structures and colonial empires. She also notes that "despite new cultural shifts today, analysed as post-colonialism and post-modernity, many of the social and cultural structures and values of the modern period remain" (p. 17). This is particularly true in the case of institutions such as museums. She proposes the theories of visual culture as a pedagogical approach for analyzing these power relations in the museum and disrupting this power. The British National Portrait Gallery is an example that epitomizes the modern function of the museum as it "depicts 'reality' and shows 'the way things are' in an apparently neutral way" (p. 17). The concept of visual culture here "allows the examination of all those signifying practices, representations, and mediations that pertain to looking and seeing" and is not bound to the values of high culture—and instead makes no "distinction between high and mass culture" (p. 14).

Trofanenko (2010) provides an in-depth analysis of the ways in which this visual culture is used for an explicit educational purpose through her analysis of *The Price of Freedom* exhibit at the National Museum of American History (NMAH) in Washington, DC. Similar to Hooper-Greenhill, she found that the exhibit is designed to tell a national narrative—in this case one that emphasizes sacrifice and the fight for freedom while not providing spaces for visitors to question or actively construct knowledge in the exhibit. As Trofanenko notes, the goal of the NMAH is to reify the story of the nation and it is designed with particular visitors in mind; museums have a particular *mode of address* for these intended visitors.

Mode of address, a concept borrowed from film studies and informed by psychoanalytics, is used to imagine who a film thinks you are and wants you to be (Ellsworth, 2005). Ellsworth uses this concept to examine the pedagogical address of spaces of learning—as a way to think about the relationship between spaces of learning and the intended relationship, or intended "reading," for visitors to the space. In her example of the U.S. Holocaust Memorial Museum in Washington, DC, she explores how the spaces of the museum are designed to engage visitors in a particular relationship with the history of the Holocaust and a type of emotion and memory intended by museum designers. She explains "the pedagogical

address of the permanent exhibit, therefore, invites its visitors into a relation. It articulates the relations of the objects in the museum among themselves and includes the visitor as one of the objects" (p. 103). This concept of pedagogical address of spaces, therefore, may be of use to history education researchers attempting to understand the relationship between space and visitor as a site of pedagogy and learning.

While Ellsworth's work is useful for interrupting the relationship between thoughtfully designed museum spaces and learning, Kirshenblatt-Gimblett (1998) provides a model for examining the intersection of history and heritage, tourism, and the representation of the "other" at museums. In particular, she emphasizes how heritage, folklore, and culture have been packaged as tourist destinations. She frames her work within ethnography to focus on the role of ethnographers as creators of this representation of culture—a framework useful as part of a postcolonial approach to examining museums and historic sites. She explains that the objects in museums are used to construct narratives of heritage and culture using ethnographic artifacts that "are objects of ethnography. They are artifacts created by ethnographers. Such objects become ethnographic by virtue of being defined, segmented, detached, and carried away by ethnographers" (p. 18). This emphasizes the interpretive and subjective nature of how culture and heritage are represented (also see Trofanenko, 2006). Using examples such as Ellis Island and Plimoth Plantation, she examines how the goals of tourism have further "thematized" historic sites and museums as destinations for tourism first and as sites of engaging thoughtfully in the interpretation of the past and the role of the site in the past as a distant second.

More explicitly within the field of history education, Segall and Trofanenko (2014) take this analysis further to examine how museums are sites both of representation and of identity formation. Using the National Museum of the American Indian (NMAI) as a case study, they found that there is power in the attempts of the museum not to feature American Indians as objects of the past but instead to offer a multitude of voices and epistemologies through its architecture and exhibits. They found, however, that the intended pedagogical address to challenge visitors' romanticized view of the tragic Indian from another century may go too far from the portrayal given in the traditional museum. For visitors "the result could often be a failure to learn rather than opportunity for intellectual growth" (p. 59). They offer a critique not of the designed experience the NMAI hoped to deliver but of how the museum functions as a pedagogical endeavor:

> The absence of explicit pedagogical strategies to help visitors make sense of the multiplicity of voices, the open-ended quotations, and the obliqueness of the messages does little to convey the educational mission the museum hopes to transmit. What is missing are ways to introduce such information and help the visitor make sense of what is presented. (p. 63)

In a volume dedicated to teaching difficult knowledge through museums (Lehrer, Milton, & Patterson, 2011), Simon (2011) similarly argues from a curatorial perspective that pedagogy and pedagogical frameworks be used within the

curatorial process. This also reflects Falk and Dierking's (2000) earlier finding about the contextual and social nature of learning at the museum and the frequent disconnect between the meaning intended by the museum curators and the meaning making of visitors. Marcus, Stoddard, and Woodward (2017) attempt to present a framework for applying these theories to practice for history education in museums. Imagining the museum, historic site, or neighborhood memorial as a pedagogical space is a useful framework for considering research into teacher preparation for teaching in these spaces, collaborations between museum staff and educators, and into the learning that occurs when students engage these spaces. Chapter 11 of this volume, authored by Segall, Trofanenko, and Schmitt, goes into greater depth on the contributions of critical theory in history education set in museums.

Epistemic Cognition of History and Historical Thinking with Museums

A growing body of research in the area of teaching and teacher learning with museums and historic sites builds from research on historical thinking and, in particular, through the application of theories of epistemic cognition of history. There are variations of theories and heuristics grounded in the cognitive work of historians (e.g., VanSledright, 2002; Wineburg, 2001). Given the different types of evidence students may engage with at museums as part of place-based historical inquiry, as well as how museums serve as evidence, here I use the concept of epistemic cognition of history as defined by VanSledright and Maggioni (2016) to help guide this section. They conceptualize epistemic cognition in history as the interpretive act between object (historical evidence) and subject (teacher/student) with three major categories: *objective*: views object as static history as happened; *subjective*: views object as one possible interpretation or version of the past among many; and *criterial*: the interpretive act is guided by a set of criteria for evaluating and contextualizing the evidence based on the work of historians. It is these beliefs about the nature of history and how history is warranted that are at the core of a sophisticated mode of epistemic cognition history educators need to engage in authentic history pedagogy.

In the example of the historical marker above, a criterialist level of epistemic cognition would lead to an interpretation including the corroboration of evidence with the marker's description of the site, and the analysis of the motivations of the group that created and funded the marker, as well as the time of production. As part of a study examining teacher's personal epistemology and its relation to field-based pedagogy, the response below from a teacher in Singapore shows some evidence of a criterialist approach to thinking about historical sites and illustrates why the teacher selects and uses a site for field-based historical inquiry:

> Labrador Park gives an out-of-classroom experience on the reasons why Singapore fell to the Japanese. It is interesting to showcase to the students the elaborate preparations that the British had for war through the gun

> displays and information stands present there. Its location (namely the vantage point) also showed how the British had a bird's eye view of any attacks that may be directed at them from the sea. What makes this place interesting is that it also debunks the perceived prowess of British military. Getting visitors/students to first look at the massive display of war preparations and consequently getting them to look at why the British failed to protect Singapore, provides them with a more balanced perspective of the historical event. (Stoddard, Shy, Hartley, Vo, & Fee, 2016, p. 4)

This response is one example of using a framework of epistemic cognition of history as an interpretive framework for interpreting teacher and student engagement with museums. The studies presented below also attempt to utilize conceptual frameworks of historical thinking or historical cognition as models for developing teachers' epistemic understandings and pedagogy with museums.

One primary objective in this area of research is to develop heuristics modeled on how historians may approach historic sites similar to the studies done on historian's work with other forms of historical evidence (e.g., Wineburg, 1991). In a study modeled most closely after Wineburg's, Baron (2012) asked five historians with expertise in historic sites to participate in identifying key terms and protocols for analyzing historic sites and then engaged them in analyzing the Old North Church in Boston. Her study identifies five constructs as part of a heuristic for site-based historical thinking: *origination*, *intertectonality* ("between buildings," p. 840), *stratification*, *supposition*, and *empathetic insight*. Baron argues that this framework is useful for considering historic sites like the Old North Church, which has evolved structurally over time with additions and remodeling during various eras.

Baron (2013) uses this framework for historical thinking with historic sites to examine how teachers ($n = 15$) may benefit from engaging in professional development at historic sites modeled after short workshops, self-directed programs, and a more intensive institute. Through employing pre/post think-aloud tours of historic sites and the generation of lesson plans and work with document sets, she found that all three groups improved in their disciplinary knowledge of how to engage historic sites, but the institute group in particular had a higher level of transferability to their ability to prepare lessons and to analyze document sets. This study raises questions about the need for engaged professional development modeled on disciplinary practice for teachers and the minimal level of time and activity needed to have an effect on teachers' knowledge and pedagogy.

Several other projects focus on a version of a *historian lab* as the model for engaging preservice teachers in museum-based education. In an example of a structured partnership between museum staff and preservice teachers, Baron, Woyshner, and Haberkern (2014) describe models of preservice teacher development in partnership with historians working in archives, museums, and historic sites through their programs in Philadelphia, the Cultural Fieldwork Initiative, and in Boston, the History of Boston/History Labs program. The Cultural Fieldwork Initiative places preservice teachers from Temple University into internships in museums that engage them in working with museum staff to develop educational programming and materials while crafting their

understanding of the functions of the museums as cultural institutions and archives (also see Woyshner, Reidell, & Brasof, 2013). The History of Boston model is more structured as part of coursework in the teacher preparation program at Boston University and engages students in developing their skills in historical inquiry with history sites (including the activity at the Old North Church mentioned above) and through engaging with historians, archivists, and other professionals at sites in order to understand their epistemology and professional work. In both of these cases, the authors note the impact on their students' development of historical knowledge and historical thinking as well as their abilities to apply this knowledge to their teaching.

Alternative models of historian labs focused on developing student epistemic cognition through placed-based inquiry are more truncated and pedagogically focused on museum experience. Sundermann (2013) engaged her undergraduate students with two different museums to develop their own understanding of the work of public historians in acquiring, presenting, and engaging visitors in their exhibits, including the ethical challenges they face (e.g., representation of gender, colonialism). She then asked these preservice teachers to develop lessons using this perspective to engage their own students in local historical sites. Sargent-Wood (2012) presents an alternative model—the history lab—in a methods class by modeling historical inquiry and helping students develop skills and knowledge. She uses two cases as part of the lab: the 1928 case of a missing couple in the Grand Canyon, and the case of whether a building that housed an African American school in Virginia prior to desegregation should be preserved and made part of an African American heritage trail. Preservice teachers then develop their own investigations for their students. I see these models as issues-based in addition to place-based, focusing on preservice teacher development of historical thinking, utilization of archives and primary sources, and pedagogical development for Barton and Levstik's (2004) notion of the common good.

Other examples of museum-based studies focus more on the impact of students' engagement with museum exhibits on their own content knowledge and ability to engage with difficult subjects. In an attempt to see what impact a powerful museum would have on what elementary preservice teachers ($n = 49$) from two different programs knew about the Civil Rights Movement and their ability to design field trips, Gregg and Leinhardt (2002) used a framework focused on authentic out-of-classroom learning (cf. Resnick, 1987). They found that their participants gained significant knowledge from their time in the museum and were able to have discussions regarding issues of race presented in the exhibit, but struggled in many cases to have clear objectives for their own students' field trip to the museum—especially when it came to the challenging issue of race.

The studies in this section represent a range of emphasis in teacher education using museum-based pedagogy—from an epistemic frame of public history to a more loosely based museum studies approach that values an issues-based approach. They reflect points on a trajectory within history education between those focused on approximating the work of historians to those engaging students in historical inquiry focused on difficult or controversial historical topics. However, all of the studies challenge students to consider the epistemic nature of history in their understanding and teaching of the past.

Museum Education Staff and School-Museum Collaboration

As noted above, critical or historiographical engagement with museums and historic sites has been identified as an important objective both within history education and within the museum education community. These groups, however, often have different approaches, epistemic frames, and processes for reaching this objective. It was for this reason that Alan Marcus, Walter Woodward, and I came together to write a book with the sole intent of providing models for powerful teaching at museums and to help the history education and the museum education communities converge and collaborate. *Teaching History with Museums* (Marcus, Stoddard, & Woodward, 2017) represents a collaborative effort between the authors (who are history or museum educators) and the numerous museum education staff and educators interviewed and observed. The book is comprised of a set of case studies of pedagogy at different types of museums and historic sites (e.g., memorials, local museums and archives) focused on authentic engagement, historical inquiry, and engaging with difficult historical issues and topics. Numerous other projects, presented below, have engaged in research and professional development toward this same goal from the perspectives of museum educators and history education researchers.

Much of the focus in this literature is on the role of museum educators, the need for greater collaboration with teachers, teacher institutes, the role of staff in museums with school groups, and models for effective field trips or curriculum materials. There are numerous studies that identify keys for successful field trips. In their review of literature on field trips, Dewitt and Storksdieck (2008) identified recommendations such as becoming familiar with the field trip site, preparing students for the setting and goals of the trip, aligning field trip activities with the curriculum, and post-visit activities to debrief and apply what was learned (p. 187). However, they also found that these guidelines were rarely followed and recommended that museum education programs could do more to support teachers in their goals. Brugar (2012), in her study of three museums in the Detroit area, similarly found that teachers and students rarely took advantage of the resources and opportunities for learning available at the museum. She suggested that museums could better prepare teachers for their museum experiences with high quality materials and pedagogical strategies.

This need for an evolving role for museum staff is also supported by research on educators and teachers in Connecticut and New York. Marcus, Levine, and Grenier (2012) found that Connecticut teachers in their study ($n = 94$) valued museums greatly but rarely asked students to evaluate or analyze the way history was presented in museums. They also found that interactions reported with museum staff consisted largely around logistical issues and not on substantive issues related to student learning and engagement in historical thinking and preparing for the field trip experience. Noel and Colopy (2006) similarly found that surveyed fourth-grade New York teachers ($n = 47$) primarily sought materials that were short and in hard copy form to assist them in preparing for their field trips.

By comparison, Noel and Colopy (2006) found that the museum educators they interviewed ($n = 7$) identified their role as motivating students and helping them to engage with their exhibits and objects; however, none of the sites did any kind of evaluation to identify what materials teachers who visited their sites needed or wanted. Wright-Maley, Grenier, and Marcus (2013) reported that museum educators they surveyed ($n = 51$) and interviewed ($n = 10$) had "gaps in [their] understanding about teachers' needs, objectives, and concerns about museum visits [that] could be bridged if teachers knew what questions to ask and what information to volunteer to museum educators before arranging a museum visit" (p. 207). The authors provide a set of questions for teachers to ask museum educators and a set of information teachers should provide in order to make the field trip experience as meaningful and effective for their students as possible. These studies also identify barriers to teachers' abilities to engage students in field-based historical inquiry—including the costs and the administrative support required to take students away from school. These barriers, along with increased standardization and testing, and shrinking time for history in elementary schools, are commonly identified as reasons for decreased frequency of history-related field trips in general (also see Johnson & McGrew, 2011; Stoddard et al., 2016).

Two models for more effective collaboration between teachers and museum staff are presented in a case study by Coughlin (2010) and an action research study by Foreman-Peck and Travers (2013). These studies emphasize the need for active collaboration between museum educators and teachers to align field trip activities (including pre- and post-visit activities) with the curricular goals of teachers built on historical inquiry in addition to the content or time period of the museum. Foreman-Peck and Travers, in particular, emphasize the role of museum educators to help identify the unique affordances of the museum that could align with curricular goals and develop strategies for engaging students in inquiry related to these affordances. An additional example of a long-term model of collaboration is presented by Gruenewald, Koppelman, and Elam (2007), who focus on a professional development program that involved teachers engaging in oral histories and then developing traveling trunk museum kits for teachers to use in their classes. These models also reflect the need to promote more organic relationships and collaborations between historic sites and educators. Blankenship (2009) advocates an approach by the Ohio Historical Society, in particular a less authoritative role among museum staff and sites.

Another common model of professional development at museums is a site-based institute that combines content and pedagogy. Based on interviews with 10 participants and observations of the summer institute at Mystic Seaport (Connecticut), Grenier (2010) found that teachers participated for their own growth and love of history as well as for the opportunity to engage with peers. Participants also believed the experience had an impact on their practice based on their new content knowledge and perspectives, and in particular additional perspectives of the history of the slave trade and other perspectives related to transatlantic trade and shipping. Maitles and Cowan (2012) also found that participants ($n = 42$) in the "Lessons from Auschwitz" project, which included teachers visiting the Holocaust death camp, had an impact on both the teachers'

knowledge of the events (even those who felt they were quite knowledgeable) and their ability to teach about it when they returned to Scotland.

Finally, in order to counter the barriers of cost and access, in particular for students in low income areas and schools, an evaluation of an effort in England to increase the value and frequency of school visits to museums found a 40% increase in student visitors to museums between 2003 and 2005 (Research Centre for Museums and Galleries, 2006). This program included funding to make these visits possible at 69 museums across nine regions in England and used responses on questionnaires from 1,643 teachers and 26,791 students. Despite the goal to reach students from "deprived" areas, the primary increases were among primary students from more affluent areas. The learning goals measured were not specific to historical thinking, but overall the teachers and students saw their experiences at the museums to be valuable for learning history (50% reported it was the primary content area), with 95% of the teachers reporting that it was likely or very likely that students learned subject-specific facts, and 94% reporting similarly for subject-related understanding.

The studies presented here illustrate the relatively strong body of research into what can be done to make museum experiences of higher quality for teachers and students. This research also identifies characteristics of successful museum-teacher collaboration models and begins to approach the idea of how to overcome barriers to this kind of pedagogy and experience. However, research currently falls short of showing how the policy, logistical, and pedagogical barriers may be successfully mitigated, especially for students from lower socioeconomic areas who are least likely to have access to museums outside of school. The greatest take away from this body of work is that more collaboration is needed between museum education staff and teachers in particular, and these studies provide models to begin these relationships.

Student Engagement and Learning at the Museum

Research on what and how students learn about the past through museums is one other area that could be compelling in arguing for more opportunities for student experiences. However, the research above suggests that the kind of pedagogy for high levels of student learning is likely not happening. As part of a study of field-based inquiry, two graduate students and I observed students being asked to engage in an inquiry-based topic at a museum in Singapore's Memories at the Old Ford Factory. This museum houses artifacts related to the surrender of Singapore to the Japanese and life under occupation 1942–1945. Students were asked to find evidence in the museum to explain the life of youth under occupation (the museum had a substantial number of artifacts to use as part of this inquiry) and were encouraged to use their smartphones as data collection devices (e.g., taking a lot of pictures). However, what we witnessed was numerous students quickly moving through the exhibit, taking pictures of anything they thought might be remotely related to their question as a form of data collection, and then taking "selfie" photos with a bronze statue of Tomoyuki Yamashita, the Japanese general in command of occupied Singapore and later convicted as a war criminal.

Did the students think of the significance of taking selfies with a person who led the occupation of their country and was later convicted as a war criminal? Probably not, but the pedagogy used at the site did not prepare students to engage with the difficult subject presented at the museum; nor were they prepared to engage in the type of inquiry and analysis necessary to successfully reach their teachers' objectives. However, this does not mean that this experience was not meaningful or will not leave the students with strong memories from the site. Falk and Dierking (1997), in their interviews of 128 children and adults ($n = 34$ fourth grade, $n = 48$ eighth grade, $n = 46$ adult), found that participants at all age ranges had strong memories of museum experiences—even if they did not always grasp the intent or objective of that experience. For example, one adult participant noted that she remembered "rows of brooms to vacuum cleaners and different stoves … Lincoln's chair with blood" from her childhood visit to the Henry Ford Museum (p. 214).

What does research does tell us about how young people engage with, and learn from, their experiences in museums? Empirical research on student learning and experiences related to history in museums is rather scarce compared to the research on teacher education and the collaborative and professional development efforts of museums. However, several meaningful studies presented in this section and several others below in the section on the use of place-based mobile technologies provide some groundwork for future research into student engagement and learning at museums.

Trofanenko models how to engage in ethnographic research of student learning experiences in museums. Her study of three students negotiating the Glenbow Museum (Calgary, Canada), which Trofanenko (2006) describes as both trying to tell the story of Indigenous peoples in the Calgary region and also inviting visitors to be part of this conversation, "offers the insight that an education in the museum needs to be an education about the museum, about how the world is re-presented, named, displayed, owned, and protected" (p. 61). She argues for museums to be more explicit in educational programming to issues of identity and to engaging students in reflecting on the museum's authority and role in constructing the narrative and the implications of this authority. In a later study of seventh-grade students in Washington, DC, who were engaged in an oral history project on World War II, Trofanenko (2011) built on the Glenbow study to examine the role of emotion in this knowledge and identity building at the museum. An exhibit on war at the National Museum of American History prompted a strong emotional and cognitive response in the student she studied that in part "disrupted his ability to comprehend and reconcile the meanings of war" (p. 491). These studies provide significant insights into how researchers should consider aspects of identity and emotion when students engage with difficult or disruptive knowledge and experiences in museums.

In addition to the qualitative and ethnographic approach of Trofanenko, others have attempted to understand the impact of student engagement with and learning from challenging historical topics in museums through other methods. Savenije, van Boxtel, and Grever (2014a, 2014b) studied the impact of 55 Dutch junior-high students' engagement in the "sensitive" history of the role of the Netherlands in the global slave trade through a slavery heritage museum. Using

questionnaires, interviews, and observations, they found that students understanding of the significance of this history within Dutch history increased, but the primarily White students viewed the significance to be part of the heritage of students of African descent, not of their own heritage. This was attributed in part to the interactions with the exhibits and staff at the museum as well as the pre- and post-visit activities.

Though numerous additional publications are grounded in teaching experiences at museums and reflect potentially powerful pedagogical models with young people, very few studies have been published that include rigorous empirical analyses of the impact or fidelity of these strategies. This is an area where researchers can build on the studies presented here that focus on how students engage with difficult historical subjects through museum experiences. A greater body of student research is presented below related to the use of mobile technologies and place-based learning, but most of this work is published in educational technology and gaming publications and emphasizes impact on student motivation, voice, or ability to design or participate versus specific measures of historical consciousness, knowledge, or thinking.

Mediation at the Museum: AR and VR in Place-Based History Education

One of the most rapidly increasing areas of research within the field of informal education focuses on the development and use of augmented reality (AR) and virtual reality (VR), primarily through the use of mobile devices, in place-based and museum learning. These developments have great potential as a medium for engaging students in local historical inquiry, and go well beyond virtual field trips (see Stoddard, 2009) or using mobile technologies merely as data collection tools as the Ford Factory example above illustrates. In an article focused on teaching local immigration history in and out of the museum, Stoddard, Marcus, Squire, and Martin (2015) describe a student-driven project that was part of the ARIS (Augmented Reality and Interactive Storytelling) group's work at University of Wisconsin-Madison that illustrates the use of mobile technologies, along with place-based inquiry and the use of historical archives, to engage others in place-based historical inquiry.

We highlighted the passionate work of one middle-school student who was determined to extend a classroom project about local immigration history in Madison into an augmented reality game for other kids to play. The game placed users as a child in the Greenbush Neighborhood of Madison during the 1950s, at a time when this historically Jewish and Italian neighborhood was being claimed via eminent domain as the University expanded. The ARIS software is open access and designed for students to develop their own place-based experiences (Squire et al., 2007), which is where the real value is in this technology. It is a mobile operating system that works with GPS to engage users as they move from place to place—in this case following a path designed by the student to tell the story of the neighborhood and what was happening during the period of University expansion through the perspectives of community members using historical archival material.

ARIS, and most of the projects I described, are grounded in situated cognition (see Brown, Collins, & Duguid, 1989) and a notion of participatory culture (see Jenkins, 2006) that values a model of social learning and creation. These studies often focus on collaborative development of mobile experiences in the form of participatory design-based research, where prototypes are tested and evolve iteratively among a community. Design-based research in education emerged from the field of learning sciences, and often features collaboration between researchers and teachers, or researchers, teachers, and students within particular learning contexts, often with a focus on the development of learning technologies, curriculum, and/or theories of learning (e.g., Barab & Squire, 2004; Cobb, Confrey, Lehrer, & Schauble, 2003). Most of the ARIS projects, as well as other AR and VR projects identified in this section, employ some aspect of design-based research.

Much of the mobile place-based research focuses on science education and especially environmental education, but the ARIS group at Wisconsin also began developing authentic learning experiences in history education early on (Mathews & Squire, 2009), starting with the Greenbush project mentioned above and another ARIS game called Dow Day. Set on the University of Wisconsin-Madison campus, Dow Day asks students to witness and write, from the perspective of a journalist, about the 1968 Vietnam War protests and the bombing of a Dow Chemical Company lab tied to the production of napalm. Using images, archival sources, their impressions of the sites, and simulated “interviews” with university administrators and other witnesses, students construct a story of the events. Matthews and Squire (2009) found that students engaged in aspects of historical thinking and inquiry, and also gained a sense of the role of place in this history, which added to the authenticity of the experience.

Later iterations of this model include additional student-driven design of ARIS games based on community and neighborhood histories and current controversial local issues (Mathews & Holden, 2012). These projects emphasize inquiry, design principals, and student voice and civic participation through student development of games that involve doing authentic research, interviewing and engaging with community members, and reflecting on how the students can act as civic agents in the community. Gottlieb (2015) developed a place-based ARIS game focused on Jewish history titled *Jewish Time Jump: New York*, in which students play the role of journalists traveling back in time to Manhattan on the eve of the “Uprising of 20,000” women on strike against their treatment in the garment manufacturing industry. In another example of a design-based research project, Gottlieb (2015) worked with fifth to seventh graders and their parents from Hebrew supplemental schools in New York City. Most of this scholarship focuses on design principals and aspects of student engagement and interest, although these later studies begin to focus on aspects of historical inquiry as well.

Mobile platforms have also moved from the streets to the inside of the museum. Numerous foundations and national governments have funded projects to explore how technologies can increase visitor engagement and learning at museums. For example, the Institute of Museum and Library Services in the US (http://www.imls.gov), a division of the National Foundation on the Arts and Humanities, has provided grants since 2000 (i.e., Webwise) that allow museums

and libraries across the US to employ different technologies as part of exhibits, visitor engagement, and virtual galleries and museum sites. Similarly, national libraries and archives have led the way in the digitization of archives and making these artifacts available to broader audiences globally. Here I focus on specific research projects that feature particular technologies that have been employed to attempt to engage students in learning; technologies have potential for greater engagement and learning in place-based history education.

One such exploration of mobile technologies is a collaboration between ARIS and the Minnesota History Center. This project uses ARIS as a platform for students to interact with exhibits through the perspectives of real Minnesotans through their *then, how, wow* exhibit (Martin, Dikkers, Squire, & Gagnon, 2014). This project has been a catalyst for the ARIS system to scale up and potentially support hundreds of users. It has also led to the development of a teacher *digital backpack* that allows teachers to follow their students' activities during the museum experience. Dikkers (2012) outlines the design process used to develop this ARIS mobile experience that utilizes QR codes that mobile users can select to bring up information—with the Minnesotan characters helping to tell stories aligned with exhibit. An evaluation study conducted after this design process reported that students ($n = 767$) showed increased interest in the exhibits as a result of using the mobile app and that teachers who were surveyed ($n = 42$) post-field trip believed the app helped to increase the quality of the overall experience as well as increase the level of student critical thinking (Audience Viewpoints, 2014). In a similar project that focuses more specifically on the work of museum curators, Marcus and Kowitt (2016) describe the initial results of their "Footnotes" project that allows visitors to use QR codes in an exhibit at the Fairfield Museum (Connecticut) to get notes on their mobile device describing both the background of the artifact and the rationale for why it was selected and decisions behind its presentation.

King, Gardner-McCune, Vargas, and Jimenez (2014) studied African American and Latino/a high school students' ($n = 30$) abilities to apply concepts from historical thinking as the students worked to develop mobile applications using MIT App Inventor. This mixed-methods study was conducted as part of a summer enrichment program for students that engaged them in historical thinking and inquiry into African American history, sessions on App design, and sessions planning their apps while visiting historic plantation sites. The authors saw significant gains in enjoyment and self-efficacy but only moderate gains related to student epistemic cognition of history. King et al. (2014) also reported a positive response from students regarding the app development process.

The CI-Spy project takes the level of augmented and virtual reality with historic sites to an even greater level (Singh et al., 2015). In addition to being able to include primary source documents and images, this project allows students to investigate the interior of historic buildings now condemned (or missing) and see them as they might have looked in the past. Students use an iPad-based augmented reality interface that allows them to explore sites such as the Christiansburg Institute (Virginia). The Institute was a campus housing an African American school during segregation. What is left is a building that is no longer safe to enter. With CI-Spy, however, students can see a digital recreation

of rooms inside the building, a map of the campus, and virtual recreations of buildings that no longer stand. This engagement with evidence that is present, and evidence that is recreated, allows students to inquire into the nature of the site, what happened there, and its significance. In initial pilot testing with 16 fifth-grade students, they reported positive outcomes in student interest and engagement as well as in the students' abilities to apply the SCIM-C historical inquiry strategy (summarizing, contextualizing, inferring, monitoring, and corroborating). Further testing explores how preservice teachers may use AR and VR to support history inquiry in the classroom (Hicks et al., 2016).

In a study that presents a more sophisticated model of using mobile applications for data collection at the museum than we witnessed at the Ford Factory, Mulholland, Collins, and Zdrahal (2005) employed a model of free choice learning (Falk & Dierking, 2000) in developing a system where visitors can log key words of interest via text messages to the museum at Bletchley Park (United Kingdom). These key words are then used to automatically curate a post-visit website highlighting artifacts from the Bletchley archive that align with the visitors' texted key words. Key words were located on the museum object information placards for visitors to text, and the authors found that a minimum of five key words seemed sufficient to develop a valuable collection of curated artifacts on a visitor's personalized post-visit site. They then ran a pilot study of the system with 35 pupils who used the materials curated from their key word texts back in their classes post-visit. The potential is clear for this kind of medium in engaging students in historical inquiry during and after a field trip.

Several other studies provide evidence for other uses of digital mediation at museums with potential implications for history education. Zaharias, Machael, and Chrysanthou (2013) conducted a quasi-experimental study of fifth-grade students ($n = 20$) to examine the impact of digital interactive interface in a Cyprus museum. They found no significant difference in learning performance, but did find significant differences in student reported user experience. In an attempt to provide greater opportunity for teachers to engage students in museums that they may not be able to visit in person, Zouboula, Fokides, Tsolakidis, and Vratsalis (2008) focused on developing less costly and more efficient methods for developing virtual museums using virtual reality software, recreating rooms from a Byzantine museum in Rhodes, Greece, and then piloting the new virtual experience with fifth- and sixth-grade students ($n = 40$). Students reportedly preferred the VR recreation of the museum and its objects over the same content delivered in a static way through a presentation and had greater knowledge gains (measured through selected response items).

These studies often focus more on design and measures of motivation and engagement over content-specific knowledge and thinking measures. There is also often no evidence of long-term gains in motivation given the short duration of the studies. There is much work to be done in all studies of student thinking and learning at museums to measure what, if anything, students are learning in a more effective and warranted manner. However, this research presents great potential for continued development in informal history teaching and learning if utilized with measures and theories described in other parts of this chapter.

Implications for Future Research

In this chapter I have attempted to provide theoretical and methodological approaches for studying informal history learning at museums. I have also identified major themes from the research conducted in these areas in order to build from this foundation of work. There is an ample body of research to build from and replicate in the areas of teacher professional development and museum-teacher collaboration. There is also a base of knowledge from different perspectives for use in teacher education. Finally, there is great potential in the areas of measuring student learning and the use of new mediations at the museum to explore how student epistemic cognition, critical analysis of museums, and the development of student-driven museum and heritage projects can further work toward the objectives identified throughout this chapter. It is easy to understand why many of these studies are small in scale or use frameworks such as design-based research or ethnography that incorporate context heavily—all of these sites and the engagement of visitors with these sites are highly contextual and vary greatly. What many of these studies lack in generalizability, they make up for in the description of theory, analysis, and design principals to replicate aspects of the project or strategy in other contexts.

Given the diversity of theoretical approaches and contexts, however, the implications are also limited often to particular foci: collaboration between museums and teachers, mobile learning at museums, or an analysis of pedagogical address and representation. However, the potential is great to explore how researchers and museum educators can measure historical cognition through student engagement in museums utilizing augmented reality. How can new modes of engaging with museums through social media, augmented reality, and app development be used to develop student epistemic cognition of history (VanSledright & Maggioni, 2016)? How can QR codes, virtual reality, and different museum-based pedagogical strategies be used to present counter-stories and challenge the representations at museums? How can these media be used to break the authoritative stance of the traditional museum narrative and promote the new museology (Lindauer, 2014)?

There are also questions that have been barely approached in the literature. Which students get access to museums and how can equity and access be increased for those students from lower income schools and backgrounds who are least likely to have access outside of schools? How can theoretical frameworks from critical race theory or critical indigenous approaches help students identify issues of interest convergence, or work to include counter-stories in their own design for exhibits? How can students' epistemic views of history be deepened and how can they be engaged in important issues of representation and perspective to develop them as citizens? Given that the area of informal history education likely will continue to grow, and issues of access and the quality of pedagogy will persist, this is an area rich for growth of study in the form of dissertations, collaborations with learning sciences, STEM-focused projects, and even larger-scale projects focused on the development of measures, pedagogies, and media for engaging and assessing student learning at the museum.

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