Methods Mystery Boxes: Scaffolded Learning in Historical Research Methods Courses

...like who wants to take a class about how to research history...

– Anonymous student

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THE STUDENT'S STATEMENT ABOVE, shared on an end-of-the-semester course evaluation, encapsulated both my students' and my own feelings towards the "History Research Methods" course before it began. These classes are pivotal to the development of professional historians and future history educators, though they may be met with disinterest from students and faculty alike. There is a general perception that methods courses are not as interesting as upper-division content courses. I admit that I was among those who believed this. As Spring 2021 approached, the reality of teaching "History Research Methods" in a synchronous online classroom sunk in. I had to shed my own disinterest in teaching this course and instead design one that was both exciting to teach and would help students make measurable progress towards their goals as history majors.

Using Grant Wiggins and Jay McTighe's principle of "backwards design,"[1] I began with the course's end goal: a "mini-capstone" paper of ten to twelve pages, showcasing students' skills in historical research. The resulting "Methods Mystery Box" assignment asks students to pick one of three curated digital archival "boxes"—

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complete with a sampling of primary and secondary sources—to examine and use in writing this research paper. The first time I taught "History Research Methods," students had the option of writing a mini-capstone paper on Japanese-American Incarceration, the Stamp Act Crisis, or Utah Women and the Equal Rights Amendment (ERA).

In this essay, I explain how I used backwards design to structure the "History Research Methods" course and how I scaffolded assignments throughout the semester to prepare students for their mini-capstone paper. The result was a successful, rewarding, and engaged historical research methods course—one that prepared students for our department's capstone course and for their history-oriented careers.

Methods Mystery Boxes: A Rationale

There are numerous approaches to teaching an undergraduate historical research methods course. Some institutions place these classes early in the curriculum, allowing the course to serve as a key stepping stone for students to "think like a historian."[2] Other departments situate these types of courses at the upper-division level, intending for methods to serve as a penultimate skills-based experience that prepares students for a senior capstone or thesis. Some institutions even use historical research methods as their cumulative final requirement for senior majors (or minors). Though all of these approaches result in different kinds of classes, scaled for specific purposes, the educational objective remains the same: to provide history students with the necessary competencies and practices to conduct professional and ethical historical research.

At Utah State University (USU), "History Research Methods" is required for all History and History Teaching majors. Although the course is a core major requirement, the department has not established a universal curriculum for faculty to implement. Instead, instructors have the flexibility to design their courses around a variety of assignments as long as they adhere to the department's learning objectives, which include foci in historical knowledge, historical thinking, and historical skills. Despite the lack of a standard curriculum, many instructors have used the same cumulative assessment for years—a paper proposal for the capstone course. The idea among faculty was that this proposal would help

students understand the capstone course's expectations. Students would, in other words, be familiar with the process of undertaking research and, perhaps, have an advantage while completing a senior capstone paper of twenty to twenty-five pages in a single semester.

There are many advantages to the proposal assignment in "History Research Methods." First, it allows students to break down the research process, starting with locating primary and secondary sources in USU's Special Collections, digital archives, and other local repositories. Second, the proposal encourages students to develop open-ended historical research questions that they can then mold into a preliminary thesis statement upon completing additional research. Third, the proposal allows students to gather a critical mass of secondary sources to eventually write a meaningful historiography section. Finally, the most significant advantage to the proposal is that students will have spent an entire semester researching a particular topic before enrolling in the capstone course. If they use this proposal, students have a significant advantage when they conduct research for and write their capstone papers.

But, over the past several years, few students have continued with the topics from their "History Research Methods" proposal when they decide on their capstone paper topics. Some students lament that their proposed topic from "History Research Methods" no longer interests them. Or they admit that the topic never interested them and that it was only convenient for our department's methods course. Additionally, some students take these courses several semesters apart, leading to a loss of momentum on any particular topic. Sometimes, too, students receive feedback that their proposed topic is far too large—or too narrow—to be a successful capstone paper. Rather than understanding how to further refine a topic, students feel like they need to simply start anew. Regardless of motive, few students seemed to use their proposal in the capstone course. This caused me to question the utility of the proposal as the summative assessment in the course.

When planning "History Research Methods" for Spring 2021, I found several other deficiencies with this proposal-based model. A proposal certainly encourages students to develop a series of good research questions. But, by only creating a proposal, students do not gain practice writing analytical thesis statements that are

backed with strong evidence. Furthermore, the research process is only preliminary. Students merely identify (or list) primary sources from Special Collections or other archives that they plan to visit for their capstone project. Few actually interact with those sources during the proposal-construction phase. Finally, students do not get the practice of writing a smaller research paper. Since our capstone paper is twenty to twenty-five pages long, many students need help practicing writing before producing a paper of that size. Although some of our upper-division courses assign historical research papers of varying lengths, not all do. Because of these factors, I determined that an equally rigorous and hands-on approach to a summative assessment was to have students write an original research paper on a topic chosen from three (and, in later semesters, five) curated archival boxes.

My original idea was to work with librarians in our university's Special Collections to build physical "Methods Mystery Boxes," letting students interact with a variety of primary sources in the Special Collections. When our department first started offering senior capstone classes online, Professor Tammy Proctor built and mailed archival boxes to students, allowing them to experience an archival replica. Unfortunately, ongoing COVID-19 restrictions in Spring 2021 made this option difficult to actualize. The Methods Mystery Boxes, as a result of the pandemic, became digital.

Initially, I thought the digital box could be a major impediment for students to engage meaningfully with primary and secondary sources. The digital format of the Methods Mystery Boxes, however, had several distinct advantages over the physical boxes that our Special Collections librarians had previously constructed. The digital box, for instance, allowed me to pull more primary sources from a larger variety of repositories, such as the Library of Congress and other digital archives, and to include secondary sources through the library's online databases. In Spring 2022, when the class was offered in person, I decided to keep the boxes digital, as this offers students a wider base for primary and secondary sources than physical boxes do. The digital nature of the archival boxes also allows students to access materials at any time of day, giving them optimal flexibility to conduct historical research. With a sizable non-traditional, working student population, this is an important benefit that digital archival boxes provide.

What Are Methods Mystery Boxes?

Methods Mystery Boxes are meant to replicate the joys and frustrations of historical research in the archive. Each box is organized according to a particular research theme. In Spring 2021, I provided three themes: Japanese-American Incarceration; the Stamp Act Crisis; and Utah Women and the Equal Rights Amendment. In Spring 2022, I added two more boxes: one adapted from my colleague, Professor Nichelle Frank, on Environmental History in the U.S. West and another box that a graduate student, Jace Jones, built around Utah and the Civil Rights Movement. Even though I am not an Americanist by training, I made the conscious decision to keep the focus on U.S. history since our University's students are more familiar with these topics. This choice also meant that most of the sources in the boxes were in English. However, in the future, I plan on developing a few topics around European and world history to speak to students with non-U.S. interests.

The mystery of the boxes comes with the sources that are included. Until they make their topic selection, students cannot see their chosen box's contents. This is to simulate the historical research process. When a historian arrives at an archive, there may be excellent, basic, or no finding aids. The contents of archival boxes are often a mystery to researchers who sometimes find seemingly unrelated—and downright random—sources in archival boxes. It is up to the historian to make sense of that material and to sift through sources to determine what is useful, important, and insightful to the topic they are investigating. I wanted the Methods Mystery Boxes to replicate this real-world experience, and, as such, students must engage with the evidence to create an argument around the information the box provides.

Each Methods Mystery Box contains ten primary sources—both textual and non-textual—including government reports, oral history interviews, legal documents, material culture artifacts (like campaign buttons), artwork, letters, newspapers, photographs, and songs. I carefully chose a variety of primary sources to encourage students to practice analyzing written and non-written evidence.

The boxes also include a brief bibliographical notation of the source and a link to its digital location. There is, however, little additional context about each primary source. This is intentional,

as I want students to research, contextualize, and engage with each source, refining skills they gained earlier in the semester. Students must interact with every primary source and find at least two additional pieces of primary source evidence for inclusion in their final papers.

Methods Mystery Boxes also include three secondary sources, including academic articles, book chapters, and full monographs. These secondary sources provide students a starting point for historiographical and contextual research. Students must find at least three additional secondary sources and include a historiography section in their research papers.

The final Methods Mystery Box mini-capstone paper must include an introductory hook, a clear and analytical thesis statement, a short historiography section, body paragraphs that employ primary and secondary sources, and a conclusion (see **Appendix A** for full instructions). These requirements replicate the criteria that my department requires for capstone papers. The papers are also scored according to the rubric used for capstone papers, but with slightly amended point totals. In this way, students go through the entire process of conceptualizing, designing, and executing a mini-capstone. I am very forthright that this is what students are doing, helping them to overcome any anxieties or skills deficiencies they may have before getting to our department's final assessment.

Backwards Design and Scaffolded Learning: A Ladder to Methods Mystery Boxes

As I was developing the Methods Mystery Box project, I was keenly aware of trying to conceptualize the assignment, as well as the overall course, without an "expert blind spot." When instructors with a "greater expertise tend to make assumptions about student learning that turn out to be in conflict with a student's actual performance" and previous knowledge, an expert blind spot can easily develop.[3] In other words, as historical practitioners and educators, we can often forget that there was ever a time when we did not know how to analyze a primary source, cite in the Chicago Manual of Style, or craft a strong thesis statement. Similarly, we can underestimate our students' abilities to have developed competency in skills prior to a course like "History Research Methods." When I design assignments

and whole courses, I know that I cannot assume that students are experts or novices in particular historical skills. All the assignments I create must be appropriately challenging for all competency levels.

When crafting the Methods Mystery Box project, I considered the many skills that students have to employ in order to write a successful paper. Students first need to understand the difference between primary and secondary sources. While many of my students came into the class understanding this concept, a few needed some help remembering. Additionally, I tried to complicate things a bit, asking students to classify a U.S. history textbook from 1955 as either a primary or a secondary source. This opened up a spirited debate about how a source, depending on how a historian uses it, can be classified as both a primary *and* a secondary source. In addition to understanding how to classify sources, students must also learn how to use the library's resources—whether digital or physical—to find those sources. Students should also know how to read secondary sources for an argument, and they must understand how scholars use primary sources to craft historical interpretations. Furthermore, students ought to be able to comprehend how historians engage with non-written sources, like photographs, material culture, and artwork. They must then think about the research process itself, building on the skills they learned earlier in the semester of how to find sources, to organize and analyze their sources appropriately. Students have to practice creating open-ended research questions that they developed from reading primary and secondary sources. They need experience putting sources in conversation with each other and crafting their own interpretations of source materials. Finally, students have to be able to form a strong argumentative frame (or thesis statement) from the research questions they created. As I contemplated this long list of historical skills, I realized that I was already involved in the process of backward course design.

In "complex assignments that might require a dozen or more cognitive steps,"[4] such as Methods Mystery Box papers, it is necessary to break down every skill and offer students multiple opportunities to practice these skills. This is what Wiggins and McTighe described as "purposeful task analysis."[5] Instructors decide on a task to be accomplished and then work backwards from it, asking "how do we get there?" through their course, module, or unit design.

Week No.	Weekly Topic
Week 1	What is history?
Week 2	How do historians engage with primary sources?
Week 3	How do historians work with secondary sources?
Week 4	How do we read for and understand historical interpretation?
Week 5	Where do we find relevant primary sources?
Week 6	Do sources and archives *make* history?
Week 7	How do I deal with non-written sources?
Week 8	How do I organize and deepen the analysis of my data?
Week 9	How do we put sources in conversation with each other?
Week 10	Fact v. Fiction: When does interpretation become historical fiction?
Week 11	How do we create open-ended historical questions and theses?
Week 12	How might we approach the research process?
Week 13	How do we read for and write historical critique?
Week 14	How do we engage in peer review?
Week 15	How do I edit and incorporate critique received from peer review?

Figure 1: Weekly Topics in the "Historical Research Methods" Course

Working with my colleague, Professor Chris Babits (who taught the senior capstone the previous semester), we put all the necessary skills that students should master before completing their Methods Mystery Box papers on sticky notes on our dining table. We ended up with about thirty skills that could be taught over the semester. I then organized these sticky notes on a fifteen-week timeline, combining topics such as "analyzing material culture" and "engaging with visual culture" into one weekly topic like "How do I deal with non-written sources?" Each week, I introduced students to—or helped students more deeply develop—a particular skill (see **Figure 1** for a full list of weekly topics). Those weekly

topics then formed the basis of three units: Unit 1: The Historian's Toolbox; Unit 2: Deepening My Analysis & Finding Sources; and Unit 3: The Research & Writing Process. The class progressively moved from simpler tasks to more difficult and advanced tasks, culminating with the Methods Mystery Box papers.

In naming each of the weeks (both in my syllabus and in the assignment instructions), I made a conscious decision to employ student-centric language. By titling weeks through the lens of the student (such as "Where do we find relevant primary sources?" and "How do I organize and deepen the analysis of my data?"), I encouraged students to become stakeholders and active participants in their own learning. They could "understand the expectations" of each week's organization and were "encouraged to use self-assessment measures,"[6] perhaps empowering a student to become a more engaged learner. In skills-based courses that have a significant amount of independent work, self-regulated learning is an important skill for students to master.

Each week, students read journal articles or book chapters that engaged with primary sources, historiography, and secondary sources. This allowed students to see history writing and research in action. As students gained familiarity with the tropes of history writing (including, for example, opening vignettes, thesis statements in introductions, and historiography sections), students became more familiar with the type of writing that they would be required to do. Since many of my students had only taken English composition classes in their first year, few fully understood how historians write and what their arguments advance. Though some students may have read monographs and academic articles for other advanced-level history courses, most were only familiar with textbooks. Grounding "History Research Methods" in the work of prominent scholars opened students' eyes to the types of writing that historians do.

Assignments to Support Methods Mystery Boxes

In keeping with Wiggins and McTighe's "purposeful task analysis" framework,[7] the course's other assignments prepare students for their Methods Mystery Box mini-capstone papers. Each assignment requires students to practice various historical thinking and writing skills. For example, students were required to complete

"Commonplace Journal Entries" for each secondary source reading. Adapted from Joseph Adelman's Commonplace Book Assignment,[8] students selected a quote or phrase from the assigned secondary source that had piqued their interest in some way. They then analyzed this quote or phrase for their classmates on Slack. Similar to a discussion board, students were expected to interact with each other, but I asked students to practice three specific skills: secondary source evidence selection; analytical reflection; and argumentation. In this way, students learn how to select, interact with, and create arguments around evidence.

Similarly, students had six source analysis assignments: three primary source analyses and three secondary source analyses. These assessments included a primary source reading grid that broke down the analysis of a primary source into five distinct categories: identification; argument and motive; audience and bias; historical connections; and personal reflection. For secondary sources, students had to locate and analyze two academic articles on the same topic, explaining the difference in interpretation and argumentation. These smaller assignments scaffolded student learning over the course of the semester. It also allowed me to make observations about individual students' strengths and weaknesses, helping them to grow as learners. When necessary, I could intervene in the learning process to help students improve their skills so that on the cumulative assignment, they would not make the same mistakes.

Challenges in Execution

Because of the scaffolded learning process, there were a few problems in executing this assessment. The biggest challenges came from students' inexperience with independent historical research. Many students initially lacked confidence when it came time for them to collect and analyze primary and secondary sources not included in their selected Methods Mystery Box. I was able to build most of my students' confidence through required individual meetings with me. In these meetings, we reviewed their progress together and addressed their concerns.

There was one challenge that I did not anticipate—several students wanted to write historiographical rather than analytical research papers. These students were fascinated by the differences in historical

interpretation of Japanese-American incarceration as well as Utah and the Civil Rights Movement in the historical discipline. Despite the fact that these students engaged with primary and secondary sources, their thesis statements were historiographical in nature. Though this was not necessarily a problem, it posed a challenge in getting the students to see why this historiographical argument did not meet the requirements of the Methods Mystery Box paper. For these students, many were much more interested with what historians had said about their chosen topics versus coming up with an argument from the archival boxes themselves. All but one student out of four with this issue were able to successfully pivot away from the historiographical argument. The lone historiographical student infused more primary source analysis into their paper, but the final product still lacked a strong analytical thesis statement based upon primary source analysis.

From an instructor's standpoint, the project's time commitment can be daunting. Methods Mystery Boxes require a significant amount of time in designing the course, as well as for grading. Putting together each box took me several hours. I had to spend time looking through online archives, our University's Special Collections, and journal databases to find relevant primary and secondary sources that my students could access. One of the most common frustrations was running across a paywall for primary sources that initially looked free.

For those interested in making their own boxes, I recommend only using primary sources from the Library of Congress, archives like Founders' Online, and university-sponsored digital repositories that are free and do not require institutional access. For secondary sources, it can be helpful to provide students not only the bibliographical citation of the source, but also a link to it through your library's website. Although you may wish to have a week devoted to how to use the library, your students will likely need help in navigating the library's website. A link to the catalog page will nudge students to use the library website to find additional secondary sources instead of going directly to a search engine.

Grading represents another significant time investment for the instructor. Students need their assignments graded very quickly, especially in the last few weeks of the semester as they build a preliminary thesis statement, outline, and rough draft for this assignment. They require not only a numeric or letter grade, but also extensive feedback on what they are doing well and how they can

improve. For me, this involved using the "track changes" function in Microsoft Word to leave comments and line-edit. This took several hours, especially on the rough drafts, but the time investment helped students to refine their arguments and analysis. The time I spent grading final versions of the assignment was much shorter, largely because I took a fair amount of time providing feedback and guidance during earlier stages of the students' research and writing process.

Individual meetings with students represented the final component related to the time investment I had to put into the Methods Mystery Box assignment. In the last three weeks of the semester, I provided students with three days of unstructured writing time. Students could attend class (in-person or virtually) and work on their papers in order to have accountability from both me and their peers. Several students noted that because of their demanding schedules, especially with work and children, this time was invaluable for them. About 80% of my class took advantage of this opportunity to show up and write. The other 20% chose not to attend, which was perfectly acceptable. When looking at results over two semesters, those who attended these writing sessions tended to earn a half-letter grade better on their final papers than their peers.

During these writing sessions, students could meet with me for fifteen minutes to discuss their progress. Students were required to meet with me at least three times in the last month of the semester to discuss their papers and their progress. Although some instructors may leave it up to the students to reach out for help and assistance, I wanted to build in several formal opportunities for students to ask questions, receive feedback, and address their concerns. For my schedule, it worked well to have students meet with me during those writing session classes. But I also had to greatly expand my office hours during those weeks in order to accommodate the course's twenty-five enrolled students. I made sure to offer times in the morning, during normal work hours, but also in the evening to accommodate students' schedules.

These time investments can be real challenges for instructors who have significant teaching loads, demanding research agendas, and otherwise busy personal lives. Students certainly became self-regulated learners by the end of the semester, but it took a great deal of support on my part. This is a real issue to consider if anyone wants to build a similar course around Methods Mystery Boxes.

Results: The "Special Magic of Research"

The quote that started this article was slightly misleading, as it was an excerpt from a larger anonymous comment:

> I was so intimidated going into this class but you truly care about your students and just want to make them better historians. You knew how to take a hard topic and make it seem so easy like who wants to take a class about how to research history I would take it all over again if I knew you would be teaching it.

While I certainly care for my students, I attribute this student's success to the course design and their own advancement in learning. The Methods Mystery Box paper demands that my students break down the research process and become actively engaged throughout the semester as they build their historical thinking and writing skills. Students could not be passive participants.

The average grade on the Methods Mystery Box papers across the first two semesters was 91% (or an A-). Only two students received a failing grade on the paper, but only because they did not turn in a final version of their essay. In all, not only did I perceive success with the assignment, but so did my students. On end-of-course evaluations, students reported that they gained the confidence to take on their capstone course in a subsequent semester. Among the skills that students said they gained were more efficient time management; a familiarity with the library and special collections; an understanding of how to use online archives; and the ability to form argumentative, analytical thesis statements. While these skills were imperative and the reason I created the assignment, students also reflected that they had fun in the course. They felt like the course was not just another box to check off to a satisfy major (or minor) requirement. They perceived significant value in enrolling in and completing the course.

Many students also reflected on an experience that professional history practitioners know to be true: historical research can provide an exhilarating thrill. Several students became enthralled with their research topics, following "rabbit holes" that took them in unexpected directions. These students deepened their knowledge of the past, and they emerged with a stronger understanding of the human experience. On another end-of-semester survey, one student remarked that the "special magic of research that [she] experienced

in this class"[9] made her excited to take the capstone course the following semester. Methods Mystery Boxes provide students that opportunity to develop key historical thinking, reading, and writing skills while allowing them to feel the magic of historical research.

Notes

1. Grant Wiggins and Jay McTighe, "Backward Design," in *Understanding by Design* (Alexandria, VA: Association for Supervision and Curriculum Development, 2005), 13-34.
2. See, for example, The University of Texas at Austin's "Thinking Like a Historian" courses. Searchable online course schedule at <https://liberalarts.utexas.edu/history/courses-in-history/>.
3. Mitchell J. Nathan, Kenneth R. Koedinger, and Martha W. Alibali, "Expert Blind Spot: When Content Knowledge Eclipses Pedagogical Content Knowledge," 2001, <http://pact.cs.cmu.edu/pubs/2001_NathanEtAl_ICCS_EBS.pdf>.
4. Flower Darby and James M. Lang, *Small Teaching Online: Applying Learning Science in Online Classrooms* (San Francisco, CA: Jossey-Bass, 2019), 32.
5. Wiggins and McTighe, "Backward Design," 19.
6. Mary Ann Corley, "TEAL Center Fact Sheet No. 6: Student-Centered Learning," Teaching Excellence in Adult Literacy (TEAL) Center, Literacy Information and Communication System (LINCS), <https://lincs.ed.gov/state-resources/federal-initiatives/teal/guide/studentcentered>.
7. Wiggins and McTighe, "Backward Design," 19.
8. Joseph M. Adelman, "Commonplace Book Assignment," September 4, 2014, <https://josephadelman.com/2014/09/04/commonplace-book-assignment/>.
9. Anonymous student, "IDEA Survey Response for History Research Methods," Utah State University, Spring 2021.

Appendix: Assignment Instructions

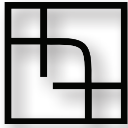
Methods Mystery Boxes

First, you will review the information on the Methods Mystery Boxes selection page that includes a brief overview of the available topics.

Then, you will pick one box topic in Week 8 as the subject for your Methods Mystery Box paper.

Finally, you will complete a paper on your topic that meets the necessary requirements below:

1. The paper should be **10-12 pages** (double-spaced, 12-point Arial or Times New Roman font with 1-inch margins on the left and right), inclusive of footnotes.
2. You should include a detailed **bibliography** (in Chicago Manual of Style), which does not count towards your page total.
3. The paper should **advance an analytical argument**, based upon the primary and secondary sources included in your Methods Mystery Box.
4. You must **employ at least *6 secondary sources*** (all box topics include 3 secondary sources, so you need to find at least 3 more). Note: "employ" does not mean that you discuss all 6 in your historiography. Instead, you can cite them throughout the paper and/or make sure that 6 are listed in your bibliography, which indicates that you used/read them but maybe didn't cite them.
5. You must **employ at least *12 primary sources*** (all box topics include 10 primary sources, so you need find at least 2 more). Note: "employ" does not mean that you need to quote or analyze all 12. Much like secondary sources, make sure that you have at least 12 primary sources listed in the bibliography.
6. All papers must include **an introductory hook, a thesis statement, a historiography section, body paragraphs that provide analysis, and a conclusion.**
7. Be sure to cite your sources using **footnotes** in Chicago Manual of Style.



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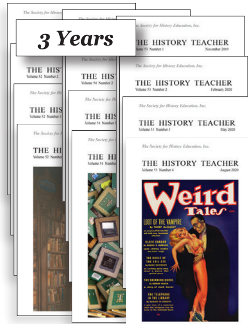

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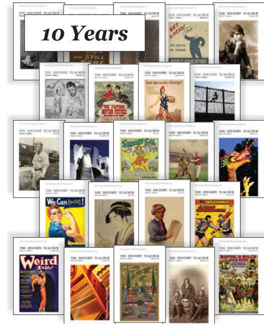

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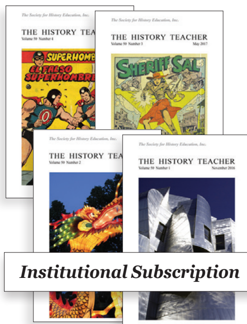

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