Transforming Sixth-Grade Social Studies from "Just the Facts" to Historical Inquiry: A Case Study of Teacher Learning

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DIDACTIC HISTORY CLASSROOMS portray history as uncontested facts—names, dates, events—to be memorized and recalled on demand.¹ Historical inquiry and argument, however, are inherently intertextual and interpretive, standing in marked contrast to the didactic history instruction so prevalent in K-12 classrooms. Against this backdrop, in the last decade, two significant standards documents have emerged that emphasize the importance of engaging adolescents in developmentally appropriate forms of historical inquiry: the Common Core State Standards and the College, Career, and Civic Life (C3) Framework.²

Intervention research indicates that historical inquiry curricula call for different tasks, materials, and methods of teaching compared to those focused solely on content. Inquiry curricula require teachers to shift from the methods, materials, and assessments to which they are accustomed. As a result, despite intervention research efforts that have been successful in engaging adolescents in reading and thinking like historians, teachers' uptake of these interventions remains very limited.³ One of the obstacles to greater uptake is that for many of

the topics and periods of history, teachers must design and develop materials and tasks that would enable them to implement inquiry-oriented instruction. It is not surprising that teachers find this to be an overwhelming set of demands. Thus, even when teachers espouse beliefs about the value of inquiry instruction, it is infrequently implemented in their classrooms, especially when change is expected all at once and overnight.⁴ Such expectations are simply unrealistic, with most scholars estimating months to years for meaningful and lasting change in instructional practices.⁵

This paper reports a case study of a middle school teacher's gradual change process as she partnered with researchers to iteratively design and implement her history instruction. This collaboration created a transition from a focus on teaching names, dates, and events to instruction that supported her middle school students' engagement in historical inquiry. This case illustrates the evolutionary transition of the instructional practices and learning processes of this middle school teacher. As such, it can serve an educative function for other educators who may wish to adapt the process as they design and implement inquiry-based social studies curricula in their own classroom contexts.

The first section of the paper provides an overview of the key principles of historical inquiry that guided the design and implementation of the inquiry-based materials, tasks, and instruction model for the case study teacher (Ms. H) and then describes the larger project in which Ms. H's experience was embedded. With that background, we then describe Ms. H's evolving design and implementation to support her students' historical inquiry in two successive academic years, and present an accompanying discussion of her learning throughout this process.

Historical Inquiry

Contemporary learning standards for history emphasize the inquiry practices that historians engage in as they attempt to reconstruct the past. These inquiry practices and strategies follow from the nature of the historical record, acknowledged to be inherently incomplete, conflicting, and obscure.⁶ Historians seek to understand the perspective and credibility of documents from the historical period under consideration—the primary sources. They do so by comparing and contrasting primary sources, looking for similarities and

differences in accounts (corroboration), by considering who produced each source and for what purpose (sourcing), and by considering what else was going on at the time (contextualization). Samuel Wineburg provided examples of these strategies, along with contrasts between history experts and novices in their approaches to primary sources.⁷

Historians bring to the historical record their own interpretive frameworks that shape their claims, as well as what parts of the historical record they attend to and use as evidence in their historical arguments—the secondary sources. Interpretive frameworks include a wide variety of organizing principles, such as forms of societal systems (e.g., politics, technology, economics), governmental systems (e.g., socialism, democracy, feudalism), relations among phenomena (e.g., chronology, cause-effect, change over time, contingency, chance), and themes and foci (e.g., diversity of populations, patterns of migration). Having awareness and attention for the interpretive lens(es) shaping a particular historian's approach is critical to evaluating historical arguments, especially in conflicting secondary accounts.

Both primary and secondary sources involve a variety of representational forms, including traditional verbal text documents, but also maps, photographs, political cartoons, audio and video recordings, and objects/artifacts (e.g., jewelry, housewares, weapons). Document types vary as well (e.g., formal documents such as treaties or informal documents such as personal diaries, letters, and journals). The discourse of historical inquiry and argumentation includes language for questioning, presenting, and contesting claims; communicating authorial perspectives, positions, or frameworks; organizing arguments with rhetorical frames as well as lexical expressions of chronology, cause-effect, and beginning and ending points; and hedging on certainty of arguments and their elements. Genres of historical argument include narratives, debates, and discussions. Thus, historical inquiry involves making sense of a diverse array of informational forms in service of constructing evidence-based arguments about the past. In their description of a conceptual framework for historical inquiry, Susan Goldman et al. provided an in-depth consideration of the kinds of knowledge involved in constructing and interpreting historical arguments.9

While these historical inquiry practices are integral to the domain of history, unfortunately, they are not typically central to students' learning in social studies classrooms. Rather, as an abundance of research indicates, most social studies instruction relies on students passively acquiring information from authoritative sources (i.e., textbooks, teacher lectures). While emergent research provides evidence that students benefit from heuristic-based instruction with primary sources, teachers are often left to their own devices to assemble the documents and artifacts and figure out the instructional practices that would engage and support students in historical inquiry. 11

The case study of Ms. H describes one teacher's trajectory as she learned to support students' historical inquiry. As an illustrative case, Ms. H's journey provides social studies teachers with a concrete and detailed example of what historical inquiry instruction looks like and sounds like in terms of instructional strategies, classroom discourse, and expectations of student performance and learning.

Context of the Case Study: Iterative Co-Design of Historical Inquiry Modules

Ms. H's journey from content-focused history teaching to teaching historical inquiry occurred in the context of Project READI (Reading, Evidence, and Argumentation in Disciplinary Instruction), a multi-institutional development and research project focused on instructional approaches that can provide students with opportunities to develop the complex reading and reasoning practices that define disciplinary literacy in literary reading, science, and history. Teachers worked in collaboration with other project members on discipline-specific design teams over multiple years to engage in iterative cycles of designing-implementing-reflecting-redesigning classroom instruction. In addition to the classroom teachers, project members included university-based learning sciences researchers housed in a range of disciplinary departments (literacy and culture, curriculum and instruction, the sciences, history) and professional development designers and facilitators.

In history, the design team involved a high school history teacher, the middle school case study teacher—Ms. H, the researchers/authors of this article, and other learning sciences researchers, historians, and history educators. This history design team focused on authentic historical inquiry accessible to younger middle school students as well as older adolescents/high school students. At both levels, the overall goal was for students to develop evidence-based historical

arguments that were descriptive (answering the question, "What is the case?") as well as explanatory (answering the question, "Why was it the case?").¹³ Thus, consistent with the goals of the C3 Framework, students learn content through engagement with fundamental historical inquiry questions and processes for addressing those questions.

The history design team met monthly to collaboratively develop learning goals, identify historical sources (e.g., objects, texts, photographs, political cartoons, etc.), and brainstorm instructional strategies to inform the design of instructional modules. The two teachers then implemented the designed modules in their classrooms. Each teacher was paired with a researcher who served as a thought partner on the module designs, observed implemented lessons, reflected collaboratively with the teacher on design revisions to the implemented lessons, and identified areas in which additional resources might be needed to deepen teacher, researcher, or student understanding of historical reasoning processes. Ms. H's thought partner was the second author of this article. Each teacher-researcher dyad shared their experiences and insights with the rest of the history design team at the monthly meetings.

Project READI History Learning Goals

One of the first tasks the history design team undertook was the formulation of six interrelated learning goals that specified the competencies needed for engaging in historical argumentation from multiple historical resources—the reading and argumentation practices that constitute reading, thinking, and arguing like a historian (**Figure 1**). These goals guided the design of instructional materials and practices that would support students in developing evidence-based historical arguments. It was expected that it would require multiple experiences across modules for students to develop these competencies.

Goals 1 and 2, close reading and synthesizing resources, encompass distinguishing between what can be observed "in" the resource (e.g., object, map, document) versus what can be inferred based on information in other resources and prior general and historical knowledge. These distinctions are important for Goal 3, constructing evidence-based arguments that can be traced to the specific resource(s) as the origin of the evidence. Relationships arise through Goal 4, noticing patterns across time and space in light of

History Learning Goals

- **Goal 1**: Engage in close reading of historical resources to construct domain knowledge, including primary, secondary, and tertiary sources. Close reading encompasses metacomprehension and self-regulation of the process.
- **Goal 2**: Synthesize within and across historical resources using comparison, contrast, corroboration, contextualization, and sourcing processes.
- **Goal 3**: Construct claim/evidence relations using textual evidence and explaining the relationship among the pieces of evidence and between the evidence and the claims.
- **Goal 4:** Use interpretive frameworks and explanatory principles utilized by historians, such as societal systems and patterns across time and space, to analyze historical evidence and argument and to address historical questions.
- **Goal 5**: Evaluate historical interpretations for coherence, completeness, quality of evidence and reasoning, and the historian's perspective.
- **Goal 6**: Demonstrate understanding of epistemology of history as inquiry into the past, seeing history as competing interpretations that are contested, incomplete approximations of the past, open to new evidence and new interpretations.

Figure 1: Project READI History Learning Goals

interpretive frameworks and explanatory principles. Goal 5 refers to evaluation of one's own historical interpretations, as well as those of others, according to criteria for sound historical arguments. Finally, Goal 6 refers to introducing students to the epistemic commitments of historians and historical inquiry that motivate and give purpose to the ways in which they engage in the inquiry process and generate interpretive historical arguments.

The goals should not be construed as ordered, sequential steps in a unidirectional process. All of the goals come into play when historical accounts are constructed, and there is often back and forth movement among the goals. Close reading of a document (Goal 1) may trigger the reader to construct a claim that synthesizes information from that document with information from a previously read document (Goal 2). Meanwhile, constructing claim/evidence

relations (Goal 3) might involve going back for a close reading of specific sections of one or more previously read documents (Goal 1). In a module on Westward expansion, for example, one might argue that economics, a type of interpretive framework, motivated the move west (Goal 4). This economic argument might suggest the importance of consulting additional documents and artifacts in an effort to evaluate the completeness of the economic account and consider whether other forces might have contributed to Westward expansion (Goal 5). Overall, the inquiry itself is legitimized by seeing history as competing accounts of the past (Goal 6) rather than as an established set of facts.

The design team also considered the nature of the instructional practices that would be needed to support students in developing the competencies specified in the goals. These included teacher modeling of active reading practices (e.g., asking questions, annotating or talking to the text), as well as historical reading and thinking practices (e.g., questions historians ask about an artifact for purposes of interpreting it and relating it to other artifacts). Participation structures included independent reading, think-pair-share, and whole-group discussion in order to scaffold students' reading and thinking practices through recursive cycles of teacher modeling, guided practice, and independent work.

Designing Modules: From "Drop-In" to "Infuse and Integrate"

With the six learning goals in mind, the design team began by examining the types of instructional materials (tasks, texts, supports, and task products) that others had developed in their efforts to engage adolescents in historical inquiry. ¹⁴ For the most part, these materials were designed as "drop-in" multi-day lessons about specific historical events (e.g., Rosa Parks, Westward expansion). These drop-in inquiry lessons problematized such events and engaged students in using primary sources to investigate the events.

As a first step, the Project READI design team decided to follow the multi-day lesson drop-in format, organized around the task of explaining causes of events in response to an essential question. The initial modules the team designed included a variety of historical resources from the time periods under study (i.e., images, newspaper articles). The first co-constructed module asked what caused the conflict in the Black Hills between the U.S. government and the Lakota. ¹⁵ The second

co-constructed module concerned the Little Rock Nine and asked what obstacles existed for those trying to desegregate Central High School and how effective their tactics were in overcoming those obstacles.¹⁶

Ms. H and the high school design team teacher enacted these drop-in modules in their respective classrooms. However, the post-enactment reflection process revealed several issues with the drop-in module approach, the most important of which concerned the inadequacy of only one or two modules for students to achieve the historical inquiry learning goals. Rather, students needed multiple opportunities to practice, explore, and become proficient with applying the historical reasoning practices and heuristics across a range of content and historical artifacts.

To address this issue, our teacher collaborators suggested a design alternative to the drop-in approach: mapping historical inquiry practices across whatever content sequence a teacher's curriculum already covered, effectively making reading and thinking like a historian the modus operandi throughout the course—not just for a specific drop-in topical module. This would allow teachers to introduce and then deepen historical inquiry strategies, heuristics, explanatory principles (e.g., chronology, contingency, and causality), and interpretive frameworks invoked in historical analyses throughout the course of the academic year and across curricular units. Ultimately, we came to think of this approach to instructional design as an "infuse and integrate" model. The design team then collaborated with the teachers to specify the overlay of the goals and historical inquiry practices across the year-long sequence of their existing curricular topics. In this way, aspects of inquiry could be introduced, revisited at intermediate levels, and moved to more complex levels across the year.

While two teachers were involved in the design team, we discuss below the collaborative design and implementation of the infuse and integrate approach for the middle school teacher (Ms. H) as it developed over a two-year period. Not surprisingly, the first-year design and implementation led to modifications in the design of the subsequent iteration. The modifications and conversations throughout the design/redesign and implementation process provide a window into Ms. H's journey and her learning as she shifted the orientation of her history instruction from an emphasis on historical facts to engaging students in ongoing historical inquiry, deepening content and disciplinary understandings across every topic/module.

The purpose of explicating one teacher's journey is to provide an illustrative case that focuses on the often messy and complex change process (rather than on the results of the process). A focus only on the results or the completed modules would provide little guidance for how to start a change process, how to learn from it and through it, and how to thereby improve instructional processes and outcomes. Our focus on process is consistent with models of teacher learning, design-based research, and organizational change.¹⁸

Method

The Case Study Teacher: Ms. H

Ms. H offers an illustrative case of a teacher who was new to teaching social studies from a historical inquiry stance. Ms. H had a Master's degree in Education with a focus on literacy. For eight years, she had been teaching language arts and English as a Second Language. In her ninth year, Ms. H began teaching middle-grades social studies and history. She was in her third year of this teaching assignment when she joined the project, motivated in part by the desire to learn more about teaching history. Ms. H was recommended for involvement in the project by her school administration, who regarded her as a high-performing teacher. The school in which Ms. H taught was a K-8 school located in a large Midwestern urban district. The school population was 96% Hispanic and 89% low income.

Across each year of her participation on the project, Ms. H taught various grade levels (6th, 7th, 8th) and multiple historical regions and periods (ancient civilizations, U.S. history). This paper addresses her work with sixth graders, the grade level she taught during both years that comprise the current case.

Data Sources and Analysis

Ms. H and the second author engaged in teacher-researcher reflective conversation meetings several times a week to plan the implementation of lessons and to debrief collectively on implemented lessons, fifty-five of which were observed and recorded by the researcher. The video and field notes allowed the pair to look carefully at how students responded to Ms. H's specific instructional

strategies and approaches. Ms. H also attended monthly meetings with the Project READI history design team. All teacher-researcher reflective conversations and design team meetings were documented in field notes, video, or audio recordings. Ms. H also kept a reflective journal design document that detailed lesson plans, expectations for what students would learn, post-lesson reflections on how the lesson had gone, what the students seemed to get or not get, and what she herself was puzzled about. Finally, Ms. H also wrote a summative reflection about her learning process at the end of the project.

Using these multiple sources of data, the year-long sequences for the first academic year/iteration (IT1) and the second year/iteration (IT2) were charted in spreadsheets. These data were then summarized for each module within and across each iteration for purposes of examining when and how historical inquiry practices were introduced and deepened over the course of IT1 and IT2. Ms. H's reflective journal design document entries, the teacher-researcher reflective conversations, the design team meeting field notes, and Ms. H's summative reflection were used to characterize Ms. H's learning in terms of both what she learned and how and why it impacted her teaching.

Findings

The findings are reported in two sections: (1) How Ms. H began to transform her history curriculum and instruction during IT1 and continued that transformation in IT2; and (2) What Ms. H learned as she co-designed and enacted modules over the course of each iteration and how and why that learning drove the kinds of changes she made to her instruction. We discuss each of these sets of findings in turn.

Transforming History Curriculum and Instruction: Iteration 1 (IT1)

From the start of Ms. H's infuse and integrate approach, a major component of Ms. H's transformation was the use of four instructional strategies aimed at supporting young adolescents in engaging in the historical reading and reasoning practices entailed in historical inquiry. These four instructional strategies emerged from discussions among the design team members—including Ms. H—regarding practical ways to address the challenges that historical reading and reasoning pose for sixth-grade students, including the linguistic complexity of

historical documents, limited background knowledge for many of the topics and events in the curriculum, and preconceptions about history typically held by students of this age range.¹⁹ The four instructional strategies that were consistently employed throughout IT1 are:

- Build on learners' everyday experiences and language. ²⁰ Historical reasoning practices were first introduced "informally" using language and experiences that were familiar to students (e.g., "Who wrote the article?"). More formal labels for historical reasoning practices (e.g., "sourcing" or "corroboration") were introduced only after students were already doing the practice (e.g., taking note of the author, comparing and contrasting content).
- Make historical reading and reasoning processes visible to students. This involved teacher modeling of historical reading and reasoning (i.e., conducting a think aloud while reading), followed by metacognitive conversations on the modeling. "Going meta" made the teacher's thinking an explicit object of student reflection, thereby increasing students' awareness of not only what the teacher was doing, but also how and why she was doing it. Making these processes visible essentially provided students with concrete examples of strategies for reading and ways of thinking that define historical inquiry.
- Keep complexity manageable by minimizing reading demands when introducing new historical inquiry practices. For example, when Ms. H first introduced students to the kinds of questions historians ask about historical artifacts, she did so in the context of objects and photographs. Only after students had practiced asking these kinds of questions with objects and photographs were print-based artifacts (e.g., newspaper excerpts, catalog ads) introduced. The practice was then applied and revisited on increasingly more complex and varied text genres.
- Employ social supports for reading linguistically challenging documents and other forms of historical artifacts. Reading assignments were organized in a sequence of three phases: students independently read and annotated chunks of texts, then discussed with a partner, and then discussed with the whole class.²¹

Descriptions of how Ms. H implemented these four instructional strategies are woven throughout the explanation of IT1 across the academic year. A summary of IT1 (as well as IT2) is in **Figure 2**. The leftmost column indicates the year-long module sequence, including the essential question(s) for each module. The middle

Module and Essential Question(s)	Historical Inquiry Across IT1	Historical Inquiry Across IT2
	What is History? (Goals 1, 3, 6)	What is History? & Informal Historical Reasoning Practices (Goals 1, 2, 3, 6)
Artifacts What do historians do and how do they learn about the past?	October: Learning about the nature of history through asking questions and making inferences about artifacts and accessible texts (i.e., photos/images).	September: Learning about the nature of history through asking questions and making inferences about artifacts and accessible texts (i.e., photos/images) with discussions about the need for multiple sources.
Chicago Migration, 1830-1930 Why did people move to Chicago? Why did Chicago grow to be such a large city?	October: Developing close reading routines with a focus on generic reading strategies (e.g., predicting, summarizing, visualizing) across multiple sources to make inferences about the essential questions.	September-October: Developing close reading routines with a focus on generic reading strategies (e.g., predicting, summarizing, visualizing) integrated with historical reasoning practices (sourcing and corroboration) using informal language to make inferences about the essential questions.
	Informal Historical Reasoning Practices (Goals 1, 2, 3, 6)	Formalizing Historical Reasoning Practices (Goals 1, 2, 3, 4, 5, 6)
Ancient Egypt Why did people choose to move to ancient Egypt and why did life flourish there? What was life like for ordinary people in ancient Egypt?	November-December: Reinforcing generic close reading strategies integrated with historical reasoning practices (sourcing) using informal language to chart claims and evidence from multiple sources to address the essential questions.	October-January: Reinforcing generic close reading strategies and historical reasoning practices (sourcing and corroboration) to chart claims and evidence from multiple sources to address the essential questions. Discussion about the need for and relation between sourcing and corroboration. Comparing versions of social hierarchies within ancient society across different sources.
Great Chicago Fire of 1871 [IT1 and IT2] What are the advantages and disadvantages of using different types of sources to learn about history? [IT2] What caused the Great Chicago Fire?	January: Continued teacher modeling and guided practice of sourcing using informal language and SOAPSTone mnemonic; identifying advantages and disadvantages of multiple types of information sources.	February-March: Explicit defining of sourcing. Continued teacher modeling and guided practice with sourcing, with an emphasis on discussing reliability and trustworthiness; identifying advantages and disadvantages of multiple types of information sources.

Module and Essential Question(s)	Historical Inquiry Across IT1	Historical Inquiry Across IT2
	Formalizing Historical Reasoning Practices (Goals 1, 2, 3, 4, 5, 6)	Deepening Historical Reasoning Practices (Goals 1, 2, 3, 4, 5, 6)
Ancient Mesopotamia Why did people choose to move to ancient Mesopotamia and why did life flourish there? What was life like for ordinary people in ancient Mesopotamia?	March-May: Explicit defining of sourcing. Continued teacher modeling and guided practice of sourcing, with discussion of emergent issues of reliability. Charting claims and evidence from multiple sources to address the essential questions; comparing Egypt and Mesopotamia societal systems (e.g., economy, government, social life, religion).	March-May: Introducing contextualization through teacher modeling. Reinforcing historical reasoning practices (sourcing, corroboration practices, contextualization) through guided practice and discussions of importance/purposes of each; reasoning about value of primary and secondary sources, including influence of authors' varying perspectives; charting claims and evidence across multiple sources to write "claim paragraphs" to address the essential questions; identifying categories of societal systems.
Chicago Haymarket Affair of 1886 [IT1] Were the conspirators named in the Haymarket Riot guilty? Was Albert Parsons a dangerous man?	May-June: Introducing corroboration through teacher modeling and discussion of its importance in historical inquiry.	[N/A for IT2]
Pyramids of Giza [IT2] Did enslaved people build the pyramids of Giza?	[N/A for IT1]	May-June: Independent close reading of multiple sources integrating historical reasoning practices (sourcing, corroboration) to present evidence-based argument to peers addressing the essential question; evaluating validity of evidence across sources; introduction to notion of presentism through teacher explanation.

Figure 2: Progression of Historical Inquiry Across Modules during Iterations 1 and 2

column details the inquiry focus and the Project READI historical inquiry goals month by month for IT1, with the shaded rows defining three major shifts in the focus of historical inquiry that emerged from the data analyses. IT1 began with the focus, "What is History?" before proceeding to "Informal Historical Reasoning Practices," and concluding in the last month of the school year with "Formalizing Historical Reasoning Practices." The following descriptions of Ms. H's instructional design trace these shifts over the course of IT1.

What is History? Ms. H began the year by introducing students to an alternative view of history from one of comprehending seemingly incontestable facts to focusing on how historians learn about the past. Ms. H introduced students to this alternate view of history by beginning the year with an Artifacts module asking the essential question: "What do historians do and how do they learn about the past?" Discussions touched on what historians are trying to find out and the various types of information resources they use in their inquiries. Ms. H brought various artifacts (e.g., fish skinner, eggbeater, old-fashioned iron, rug beater) into the classroom (see Figure 3). Students examined and asked questions about the various artifacts, defined the term "artifact," and discussed "what can historians find out about the past by looking at artifacts?"22 The class also continually added source types (e.g., photographs, objects, various types of texts such as catalogs, flyers, newspapers) to a poster labeled "Sources Historians Use" each time they explored a new type of source.

Additionally, during this module and as a starting point for claim/evidence reasoning, Ms. H had students distinguish between observations based on what is visible in an information resource such as an object or photograph, versus what can be inferred from the observations. The teacher and students co-constructed a definition of "inference," explaining it as "an educated guess," "an idea based on evidence and reasoning," and "taking our observations [and then] adding what we know." Ms. H also emphasized that making inferences was "something that you do all the time without even thinking about it. It's so natural. So, when we learn to make inferences, we're really just learning to notice what we already do."

During the second module, Ms. H introduced generic processes of close reading (e.g., predicting, summarizing, visualizing) for images and short written text segments.²⁵ The topic of this second



Figure 3: Classroom Lesson Artifacts

module was one with which students had some familiarity due to the immigrant communities in which many of them lived: the migration of people to Chicago between 1830 and 1930. Paralleling the emphasis on observation versus inference that she had introduced for objects and photographs, Ms. H had students determine what texts said (literal meaning) and what they meant (inferential meaning). In particular, she focused on sequencing events and making inferences about why people live near water, without explicitly connecting these activities to what historians do. Having introduced these reading routines, the class then used them in the next module on Ancient Egypt, a less-familiar location.

<u>Informal Historical Reasoning Practices</u>. During the third module, Ms. H guided students through an informal version of sourcing by having them preview a primary source and address questions about who wrote the text, when it was written, and what type of text it

was.²⁶ In a later lesson in this module, Ms. H modeled her *historical* close reading, which included an "informal" example of sourcing: She thought out loud as she read, indicating what she noticed and her reasoning about the title and date of the document, but did not use the term "sourcing" with students. She then had the students discuss what they heard her doing as she was reading, guiding students in "going meta" about her processes.

As they had done in the previous module, students practiced claim/evidence reasoning with the longer texts that constituted the Ancient Egypt readings. They charted segments from the texts that supported their claims about what life was like and inferences about population density near water (i.e., the Nile River).

The introduction of informal historical reasoning practices continued into January with the fourth module on the Great Chicago Fire of 1871. Ms. H started this module by re-foregrounding the work of the class as "doing the work historians do" and explaining that they were closely reading texts to address "the same questions a historian might ask." She introduced the "SOAPSTone" sourcing mnemonic as a tool that would help them do that, unpacked what each letter referred to (Speaker, Occasion, Audience, Purpose, Subject, Tone), and modeled her thinking for each letter while reading a newspaper article about the Chicago Fire. Again, Ms. H did not link this to the formal label of "sourcing," but relied on everyday language as illustrated in this excerpt from her think aloud modeling:

So now I want to think about the questions a historian might ask. The speaker, well the speaker is a writer—the newspaper...the person who wrote it is a reporter.

The occasion—what time period?...I see the occasion was on October 10, 1871. I remember that the fire started on Oct. 8 and lasted until Oct. 10. I'm thinking this was written right after the fire. I'm thinking that makes a difference, not 10 or 20 years later, right after.

Audience? With a newspaper, the audience is who?²⁹

This process continued for the remaining components of SOAPSTone. When she concluded, she asked the students what they had noticed in her thinking out loud.

Ms. H also brought in a variety of different sources (e.g., newspaper articles, testimonies, memoirs, letters) and had students discuss and chart the advantages and disadvantages of these different

types of information resources. From January through March, there was a gradual increase in what students did independently to practice informal sourcing using the SOAPSTone tool prior to sharing with one another and the whole class.

Formalizing Historical Reasoning Practices. From March until the end of the school year, Ms. H moved from informal ways of referring to sourcing practices to introducing more formal language. As she began a new topic, Ancient Mesopotamia, Ms. H reminded the students of their focus on doing the work of historians and again modeled SOAPSTone, after which students engaged in their own independent sourcing. The class then discussed and developed a formal definition of sourcing, during which issues of reliability of different types of documents emerged. For example, students determined that a textbook author was "fairly reliable" since an Amazon search for him indicated that he "had a bunch of books published and was part of a college."30 Students also noticed that the document they were reading was excerpted from a longer one and they wondered aloud about what was missing. They discussed the nature of "stories" that were passed down orally and how details may have changed over time, influencing the reliability of what eventually became part of the written historical record.³¹

As had been done with Ancient Egypt, students constructed claim/evidence charts based on the information resources they were reading and made inferences about the lives of people in Ancient Mesopotamia. Toward the end of the module, Ms. H introduced categories of societal systems (e.g., economy, government, social life, religion) and had the students compare the two ancient civilizations (Egypt and Mesopotamia) with respect to these categories.

In the last module of the school year, about the Chicago Haymarket Affair of 1886, Ms. H formally introduced corroboration. She used a process similar to the one she had used to introduce sourcing: she first modeled corroboration and then had students discuss what they noticed her doing—making the practices visible to the students and having them "go meta" on her thinking. Ms. H modeled her thinking about a primary source newspaper, guided by questions from a corroboration poster she created (see **Figure 4**). In commenting on what she was doing, students noted that she was connecting the text she was reading to other texts they had read. Ms. H elaborated

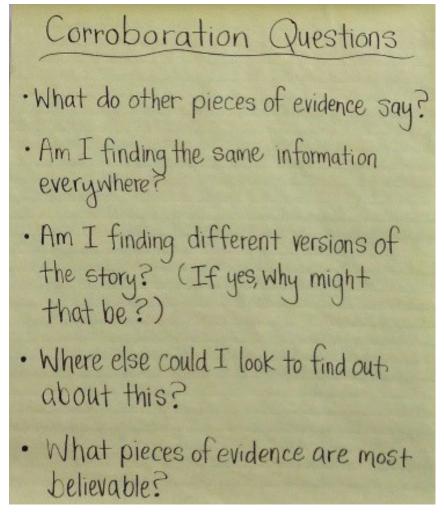


Figure 4: Corroboration Questions Poster

on the kind of connecting she was doing: "When I was reading the source, even though this was the only one in front of me at the time, I was thinking about the information in there and comparing those ideas, because that's really what corroboration is...I was going back in my mind...and I was thinking about what information was in there [other sources]. Is it the same or is it different?"³² In this way, Ms. H was connecting sourcing and corroboration, comparing

different source attributes (author/date/type of source) to support her reasoning about the likelihood of the accused men throwing the bomb in Haymarket Square.

After her think aloud in this lesson, Ms. H reified the definition of corroboration, stating, "even though this was the only [text] in front of me at the time, I was comparing it to other sources I've already read. I was thinking about the information in there and comparing those ideas, because that's really what corroboration is." Students concluded that corroboration is important because "once we start to find the same evidence multiple times, we start to think that maybe it's more reliable or that it might be closer to being accurate." ³⁴

Iteration 1 Summary. Overall, IT1 reflects Ms. H's selective "trying out" of a limited set of historical inquiry practices. Ms. H focused students on what historians do and the kinds of questions they seek to answer (Goal 6). She introduced close reading and annotation as general comprehension strategies (a form of Goal 1). The practices Ms. H introduced were limited to making observations and inferences relevant to particular claims using information from multiple types of historical records (Goal 2), with synthesis across records (Goal 2) introduced shortly before the winter break. Upon returning from winter break, Ms. H presented the SOAPSTone mnemonic tool using informal language to introduce and then engage students in sourcing practices, including considerations of the affordances of different types of sources and implications for reliability of the information (Goal 5). Explanatory concepts (Goal 4) were introduced only briefly in the context of comparing two ancient civilizations. Sourcing became a formalized historical reasoning practice over the course of the second semester, with a formal definition being developed during the last month of school. Ms. H repeated a similar process with corroboration in a truncated time frame, introducing and formalizing it as a practice during the last week of May.

Transforming History Curriculum and Instruction: Iteration 2 (IT2)

The rightmost column of **Figure 2** details the inquiry focus month by month for IT2. As with IT1, three major shifts in the focus of historical inquiry emerged from the data analyses. The first focus is notably different from IT1 in that Ms. H integrated "What is History?"

together with "Informal Historical Reasoning Practices" during IT2. She then transitioned to "Formalizing Historical Reasoning Practices" five months earlier than in IT1. As a result, the last third of the year in IT2 focused on "Deepening Historical Reasoning Practices," a focus that was not present in IT1. Furthermore, and unlike IT1, close reading strategies were integrated with historical explanation and argumentation from the beginning of IT2. Ms. H continued to use the four instructional strategies that she had used in IT1: build on students' knowledge, make historical thinking visible, keep complexity manageable, and employ social supports.

What is History? and Informal Historical Reasoning Practices. As in IT1, Ms. H's initial lesson module on Artifacts engaged students in thinking about what historians do and how they do it. Unlike IT1, however, Ms. H's questioning pattern in response to students' contributions suggested that she had a clearer vision of the key ideas she wanted to get on the discussion floor to support students' historical inquiry (i.e., Goals 1, 2, 3, and 6). This was reflected in a lesson early in the year, during which Ms. H intentionally prompted students to consider the need for multiple sources for historical inquiry, thereby informally introducing corroboration as a way to "get us closer to an understanding of the past."35 For example, when examining a particular artifact, Ms. H asked students questions about whether they could "find out more about this artifact, what it is, and how it was used in the past." The first student to respond "was certain that it's better not to have too many sources because they would probably all say the same thing and you'd be wasting your time seeing the same information over and over again." Ms. H then asked, "Does anyone else have a different idea?" Some students elaborated on the single-source-isbest idea, but others offered an opposing response: "if many sources repeated themselves," it would "be a good thing because it makes it more likely that the information is accurate," indicating informal introduction of the role of source comparison in determining reliability.³⁶ During IT1, these ideas were not even hinted at until the middle of the second semester.

Throughout the first two modules in IT2, Ms. H informally engaged students in sourcing and corroboration by building on everyday language and students' noticings. She emphasized

purposeful close reading to support historical inquiry, especially with respect to information pertinent to sourcing and contextualizing. For instance, during the second module (on Chicago Migration, 1830-1930), after noticing that a student circled the date of a source in his annotations, Ms. H asked the class, "Is it important [to know the date]? Why?" Students reasoned, "If we look at the date, it helps us to notice how Chicago is changing over a period of time."³⁷

Ms. H's awareness of changes from the prior year in how she was approaching historical inquiry instruction was noted in her reflective journal. She wrote that in comparison to the previous year, she was generally more attuned to recognizing and capitalizing on what students were spontaneously doing that reflected historical inquiry.³⁸ With this more well-defined sense of what historical reasoning looked like in her sixth-grade classroom, she had redesigned the Chicago Migration module to include primary and secondary sources that were confirmatory. When she saw that students were "already naturally doing some corroboration" with this text set, she decided to include a teacher modeling think aloud emphasizing corroboration across sources.³⁹

Formalizing Historical Reasoning Practices. The informal engagement in sourcing and corroboration during the first two modules of IT2 set the stage for formalizing these practices much earlier in the year than had been possible in IT1—beginning in mid-October. Ms. H modeled the SOAPSTone heuristic in the third module (on Ancient Egypt) and included a discussion of information reliability and the role of corroboration in determining such reliability, reiterating the connection between sourcing and corroboration. For example, Ms. H asked students, "What is important to notice before we even get into our close reading?" Students determined that the text they were about to read was a textbook excerpt based on text features like "little captions" and "subtitles," and that it showed a representation of an ancient Egyptian social pyramid that was similar to one in another textbook excerpt they had read. Through discussion, students reasoned that even though the authors of textbooks "don't know what really happened," textbooks might be "more true" and have a "higher chance of being reliable" because they are "written by historians" who "look at artifacts and corroborate with [the artifacts]."40

To support students' in comparing and contrasting information across texts, Ms. H had them use a "corroboration tracker" tool. Students recorded things they "already knew" (from a previously read text), as well as when something "contradicts" or "says something different" from the other text. When students noticed differences between the two texts, they brought up issues of reliability. For instance, they suggested that "you can't really trust the text" and posited that "not every text is right," "maybe none of them are correct," and that "we'll never know [which is correct]." Ms. H emphasized that we cannot "know 100% for sure every detail," but that "people who wrote the textbooks did the same things we do... they looked at a lot of different kinds of sources, pictures, artifacts and came up with best interpretation."

With the fourth module (on the Great Chicago Fire of 1871), Ms. H continued the explicit/formal emphasis on sourcing by having the class develop and chart a formal definition of sourcing. Consistent with the strategies of building on students' experiences and keeping complexity manageable, using the context of the Chicago Fire offered an event and location more familiar to her students than ancient civilizations. For example, students determined that sourcing meant "to closely read and think deeply to find important historical attributes of a text that help you understand it." They also noted that "noticing dates" was a particularly important historical detail that sets close reading apart from what they do in language arts. 42

Deepening Historical Reasoning Practices. The work of formalizing sourcing and corroboration continued during the fifth module in IT2 (on Ancient Mesopotamia). Ms. H and her students continued to discuss the need to source and practiced sourcing and cross-source corroboration. During this module, Ms. H introduced a third important historical inquiry practice: contextualizing. She modeled contextualization and had students "go meta" on her modeling. To assist students in relating and distinguishing among sourcing, corroboration, and contextualization, Ms. H had students create charts for each, indicating the purposes and the kinds of questions each practice could address (**Figure 5**).

Ms. H then turned to familiar content for an activity in which students relied on all three inquiry practices. Students wrote their own "primary" accounts of a shared event that happened at the

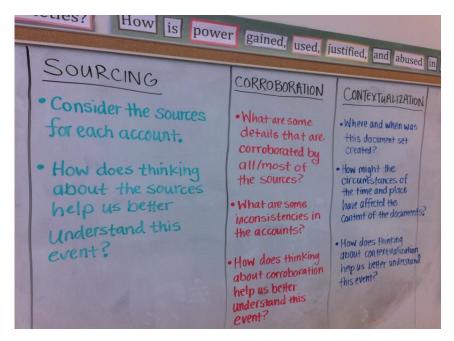


Figure 5: Classroom Charting of Purposes and Questions for Sourcing, Corroboration, and Contextualization

school. Ms. H then wrote a "secondary" account based on the students' primary accounts. Students compared these primary and secondary accounts, charting similarities and inconsistencies guided by questions to prompt their sourcing, corroboration, and contextualization (see Figure 5). In discussion, students reasoned that some information was more prevalent across the students' primary source accounts because those details were "key" or "interesting" to everyone, but that some details differed because of individual students' "points of view" or what was "important to them."43 Ms. H reiterated, "Sometimes, we find one source wrote something different because it's one person's perspective" or because "how [that person] experienced it."44 Ms. H then had students use these historical reasoning practices to make comparisons of primary and secondary accounts of life with a less familiar topic, Ancient Mesopotamia. Discussions before and during the reading of the primary and secondary sources informed the students' "claim paragraphs" about life in Ancient Mesopotamia.⁴⁵

The earlier introduction and deeper exploration of sourcing, corroboration, and contextualization in IT2 opened space for a final module that had not been conceivable in IT1. For the last module, Ms. H engaged students in a brief yet full inquiry that included students applying their historical reasoning practices to develop an evidence-based argument in more independent ways. The essential question of this four-day module asked whether enslaved people built the Pyramids of Giza. Students engaged in independent reading of a packet of texts, integrated sourcing and corroboration, and developed claim/evidence written responses. On the last day of the module, working in small groups, each student presented their own argument about whether enslaved people built the pyramids and provided their evidence and reasoning from the sources packet. They then discussed "the most convincing pieces of evidence" to support each side of the argument, prompting students to debate the validity of evidence presented by their peers in relation to what they knew about the historical context based on what they had studied earlier in the year (i.e., social hierarchy, burial rituals).46

In the context of this investigation, Ms. H took the opportunity to introduce one complexity of historical contextualization—the need to avoid presentism, the tendency to impose contemporary values, ethics, and definitions on the past. She noted that an "important issue" was brought up in the discussion: whether an enslaved person was the same as a "peasant" and if it mattered whether they were "paid or not." She explained, "This is a contextualizing piece. We have to put on a lens of another time and place. We know what 'slavery' means to us. But do we know what it meant to be [an enslaved person] in ancient Egypt?"⁴⁷

Iteration 2 Summary. During IT2, Ms. H effectively infused and integrated the Project READI history learning goals with her sixth-grade curriculum. She was more intentional about introducing and deepening sourcing and corroboration (Goal 2), beginning the year by engaging students in informal versions of both to address substantive essential questions about patterns of migration and settlement. Students were thus able to access a deeper understanding of why historians consult multiple historical sources when they are attempting to reconstruct the past from the historical record (Goal 6). Furthermore, by introducing contextualization midway

through the second half of the year, Ms. H brought added depth to sourcing and corroboration processes as students began to ask when something was produced and what else was going on at the time, enabling them to consider that information when evaluating claims and evidence appearing in the historical record (Goal 3). The earlier introduction and integration of these three key historical reasoning processes, along with chronological comparisons using organizing societal frameworks (Goal 4), prepared students to take on their own historical inquiry as a final project.

Another significant feature of IT2 was the emphasis on close reading for purposes of historical reasoning (Goal 1). That is, Ms. H continued to refer to reading strategies (predicting, summarizing, questioning) as she had in IT1, but she modeled them in service of interrogating records and accounts of the past with respect to the perspectives, motivations, purposes, and reliability of the information. In other words, she used these strategies as a means of engaging in historical inquiry practices for purposes of generating evidence-based historical accounts of what happened and why. Likewise, mnemonic tools like SOAPSTone were introduced not as procedures, but as substantive epistemic reminders of why information about historical artifacts is as important as their content for understanding and thinking critically about the historical context and explanatory accounts.

Ms. H's Learning Through Co-Design and Implementation

Throughout IT1 and IT2, Ms. H was involved in her own learning process as she participated in design team meetings and met with the second author for reflective conversations about the instruction she implemented in her classroom. Analyses of the records of those meetings indicate that during the first iteration, Ms. H grew more knowledgeable about what the historical inquiry process entailed. These changes involved discussions with the researcher as her thought partner, as well as with the design team regarding her instructional practices—specifically, how to use this new knowledge about historical inquiry in designing and implementing specific ways to support her middle schoolers' engagement in the inquiry process. The process of developing this practical know-how⁴⁸ involved acting on design decisions in classroom instruction, followed by reflection

about the consequences and their implications for what to try next. This enactment-reflection process guided Ms. H's decision making as she learned more about history as a discipline and historical inquiry practices as strategies for interrogating incomplete records of the past. As her own knowledge changed, she acted on these changes in her classroom practices. Her perceptions of what happened in her classroom, along with interactions with the researcher(s) about design, implementation, and effects on students, informed both her short-cycle, immediate redesign of next steps of instruction during IT1 as well as revisions to her overall future, longer-term redesign for IT2.

We provide two extended examples of what this redesign process looked like, as they illustrate the close relationship among Ms. H's changing knowledge of historical inquiry, her views of what students could do, and her role as a teacher in supporting student engagement in historical inquiry.

Example 1: Redesign to Highlight the Need for Multiple Sources. One example of Ms. H's process of developing her practical knowhow through consecutive cycles of enactment and reflection involved her short- and long-term redesign of ways to support her middle schoolers' understanding of the need for multiple sources to guide evidence-based historical inquiry. As indicated, IT1 began with a lesson in which Ms. H guided students in making observations and asking questions about a set of artifacts. In debriefing with the researcher after the lesson, Ms. H reflected that it was a good "first example" for students to "build on" when they would subsequently define the term "source" and discuss how sources are used in history.⁴⁹ In her reflection on the lesson, Ms. H proposed moving students toward understanding that historians need to use multiple information resources by asking them to consider, "How can we get more certainty about these artifacts?" She anticipated that the question would "naturally lead [students] to starting to think about" the need for more information and resources than just the one artifact under scrutiny and serve as an informal introduction to corroboration.⁵⁰ In enacting this subsequent lesson, Ms. H posed additional questions to students (e.g., "What would a historian do?" and "How could they get closer" to learning more about the artifacts?). In her reflections afterward, Ms. H noted that students were "able to somewhat" get to the idea that there could be "different interpretations" and that "getting their ideas on the table" was "not a bad start" to understanding the nature of historical inquiry.⁵¹ Ms. H also explained that she purposefully sprinkled language such as "source of information" and "interpretation" in the class discussion to serve as a "bridge" to later introduce students to the formal language of "sources" and "sourcing."⁵²

In redesigning the Artifacts module for IT2, Ms. H was more intentional from the start about leading students to the conclusion that multiple sources are necessary to learn more about artifacts of the past. Her reflection journal indicated that she incorporated several "formative assessment questions at key points in the lesson to gauge whether students were internalizing the key idea from the lesson: that multiple sources can get us closer to an understanding of the past than one source can. I posed questions like, 'Yes or No: I could probably find out more about this artifact, what it is, and how it was used in the past, if I could find another source about it.'"⁵³

Example 2: Redesign for Integration of Historical Inquiry Practices. A second example of the cyclical process of developing practical know-how involved Ms. H's short- and long-term redesign of ways to support her middle schoolers' historical inquiry practices. Ms. H focused first on the practice of sourcing. Throughout the first part of IT1, Ms. H expressed concerns about how to implement sourcing. She made statements indicating that it was "elusive" to her how to get sourcing "to click" and that it was difficult to "approximate" what sourcing was supposed to "look like in sixth grade" and therefore felt she was "blindly trying things." ⁵⁴ Through discussions with the researcher, Ms. H decided that as a way to "reinforce some concepts of sourcing" and to be more systematic with sourcing, she would introduce students to the SOAPSTone heuristic that was commonly used with high school students.⁵⁵ Ms. H modeled her use of the mnemonic to students on several occasions, each time revising her approach to "reflect some of the thinking of SOAPSTone" rather than necessarily addressing every letter of the heuristic like a "graphic organizer."56

It was not until the end of IT1 that Ms. H indicated that students were "sourcing in a more purposeful way." She then shifted her attention to corroboration and introduced it as a formal practice. As students took up corroboration in the last history module of the

school year, their questions indicated to her that they were gaining insights into how sourcing practices were important to explaining areas of agreement and disagreement across different documents in the historical record. Ms. H took note of this and it entered into her reflection on redesigning for IT2:

I don't think there's any reason why I'm just now introducing corroboration questions. It's not like [students] couldn't have handled that before. And the sourcing, I think it was valuable to spend a little time understanding there were different kinds of sources, but we spent half a year just understanding there are different kinds of sources. Where I think I could have layered that in with everything else earlier. And it's partly because I didn't understand how to do all those things at the same time. But now I do.⁵⁸

Ms. H went on to say that for the next year, she wanted to focus on "those skills like sourcing and introducing SOAPSTone" in a way that "wouldn't take so long to get all those things out." Indeed, this was one of the major changes in IT2 as compared to IT1.

Discussion

Ms. H's case instantiates a change process whose aim was to engage students in historical inquiry as the vehicle for content learning. The change process reflected a strong commitment to infusing and integrating the inquiry orientation across the entire academic year rather than limiting inquiry to several "drop-in" topics or units. This commitment to infusing and integrating was undertaken as an ongoing and evolving process that was fueled by the interplay of changes in Ms. H's knowledge, beliefs, and attitudes about the discipline of history and her views of the supports and teaching strategies her students needed to engage in historical inquiry. It exemplifies David Clarke and Hilary Hollingsworth's interconnected model of teacher change, which represents pathways among personal, practice, consequence, and external domains. 60 That is, Ms. H's initial ideas were realized via her practices as she enacted lessons and modules in her classroom; her reflection on the consequences in terms of what happened with students during those enactments informed her thinking, beliefs, and attitudes with respect to just-in-time planning for the "next" lesson, as well as the redesign of an overall plan for a second year of work—transforming her history classroom.

Importantly, this enaction and reflection process also made visible to her the questions she had about historical inquiry and, thus, the kinds of conceptual resources she herself needed from sources external to her. These external resources, in the form of her researcher partner and the larger Project READI design team, provided critical interpersonal opportunities to co-construct and deepen knowledge through interactions with others.⁶¹ This professional learning experience connected more abstract discussions about how historians interrogate the historical record, about criteria for reliability, and about well-reasoned arguments and explanations of the past to the module designs and lesson plans that came to life in Ms. H's classroom.

Ms. H undertook the work with Project READI out of a desire to educate herself about history instruction, having recently transitioned from English language arts teaching to social studies. She recognized her own need for learning in order to be able to support her students' learning. This personal disposition brought her into contact with the external domain offered by the larger project. The project itself approached the work with teachers as a mutual exploration of instructional models for historical inquiry, in contrasted to the more frequent top-down model of researchers designing for teachers to implement. The insights and wisdom of the classroom teacher partners throughout design and implementation were vital to creating instructional models that were feasible and effective in classrooms. The project approach was essentially "try it so we can improve it." Quite possibly, this made it a safe space for Ms. H to try things and learn what, where, and how to improve from her iterative enactments.

The opportunities for Ms. H's professional learning that Project READI provided align with an abundance of research that points to the benefits of teacher professional learning communities and lesson study groups. ⁶² Furthermore, instructional coaches available in many districts can provide an "outsider" perspective and serve as thought partners for classroom teachers. ⁶³ Regardless of the particular form of professional learning opportunities, what seems critical to the change process is that teachers have the chance to enact and reflect on their enactments from the perspective of their own learning, as well as that of their students. That is, what we see in the case of Ms. H is that reflection on and interpretation of student

thinking and learning in the context of enacted instructional designs informed decision making about what to do next with students, but also made visible questions about her own knowledge of historical inquiry practices and what she needed to learn more about. These iterative enactment and reflection processes were critical to Ms. H gradually deepening her understanding of how to introduce and engage students in taking up developmentally appropriate forms of historical inquiry practices. Manifestations of this learning are evident in the major shifts Ms. H made from IT1 to IT2, as well as in the general instructional strategies that she maintained across the two years. Initiating the transformation process with the foundational question of how historians learn about the past changed the epistemic focus of instruction and made it possible for her to guide students to informally "discover" the kinds of inquiry practices needed to create valid explanations of the past. The net effect of this process was that a small number of new concepts were introduced at any one time, making otherwise difficult instructional and learning processes manageable for both teacher and students. As such, historical inquiry was infused and integrated throughout the social studies curriculum.

Notes

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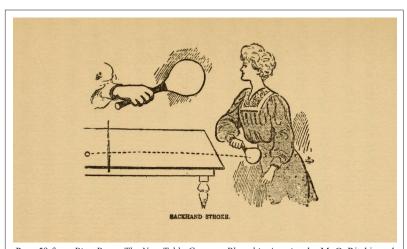
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