

Deepening What it Means to Read (and Write) Like a Historian: Progressions of Instruction Across a School Year in an Eleventh Grade U.S. History Class

Cynthia Shanahan, Michael J. Bolz, Gayle Cribb,
Susan R. Goldman, Johanna Heppeler, and Michael Manderino
University of Illinois at Chicago

HISTORY EDUCATORS, researchers, and literacy experts have repeatedly espoused the notion that teaching students to read and write like historians will improve their ability to learn history independently and think historically, as well as participate in civil society and a rapidly changing world. They contend that students who read, understand, and think historically about print and non-print primary, secondary, and tertiary sources and who learn to communicate their ideas about these sources in writing will be far ahead of those students who do not read or write in history class. This notion has become the focus of research, with promising results.¹

Far too often, though, history teachers discover that students have difficulty reading not only their history textbooks, but also the primary documents (e.g., legal briefs, first-person accounts) and artifacts (e.g., photographs, maps, relics) that are the backbone of history. And, it follows that students who cannot read single documents well will have even more trouble synthesizing across documents, finding disparities among accounts, reasoning their way

through the complexities, creating evidence-based interpretations of history and engaging in historical argumentation. Therein lies a problem. If students can't read history texts, how does a teacher help them learn or think about history? It is easy to see why many history teachers lecture, explain, show films or videos, and generally shy away from assigning reading or, if they assign it, don't expect students to complete the assignment. It is easy to see why, even if reading is done in class, one person does the reading while the class listens, or the teacher ends up explaining everything the text said.

With the advent of the Common Core State Standards, however, these adaptive practices are no longer a viable solution to a vexing problem. The Common Core State Standards not only include literacy standards for the English Language Arts, but also for History/Social Studies, and in Science and Technical Subjects. They include writing standards to be applied to each discipline.² The inclusion of history reading and writing standards ensures students engage in the literacy activity of history. But for those history teachers who were never taught how to teach history reading, the idea seems daunting. The standards specify outcomes, but not how to teach students to reach those outcomes: so what and how does one teach?

Project READI, a five-year reading comprehension research project funded by the Institute of Education Sciences (IES), a branch of the U.S. Department of Education, is in its fifth year of exploring answers to these questions.³ This paper explains the work we have done regarding what kind of literacy to teach in history and provides an example of how one teacher built history literacy instruction into her already existing curriculum.

Project READI and the Discipline of History

The acronym READI stands for ReadIng, Evidence, and Argumentation in Disciplinary Instruction, and the goal of this IES multi-site grant research project is to study ways to help sixth through twelfth grade students read and write evidence-based arguments in three subject areas: literature, science, and history. The project acknowledges that reading, writing, and argumentation are different within these three subject areas—an outgrowth of the different ways that the disciplines create, communicate, and evaluate

knowledge. For example, historians use evidence from sources such as documents and artifacts to interpret the past. Because these documents might not provide a complete picture of the past, might be contradictory, and were created for varying purposes, audiences, and perspectives, this means that cause/effect, significance, and even the details of events themselves are often murky. One's historical imagination may be needed to come up with a plausible account, and so historians know that interpretations of history are forever contested and contestable. Reading, then, takes place with a healthy dose of skepticism. Historians engage in sourcing (thinking about the perspective of the author and venue for texts), contextualization (placing each document within a particular time period), and corroboration (looking for corroborative evidence within and across documents).⁴ They also note how complete and coherent the information is—at least partially for the purposes of determining the trustworthiness of what they are reading and the perspective the document adds to the total picture.

The processes of creating, communicating, and evaluating knowledge are quite different in the sciences and in English. Because scientists rely on systematic experimentation and observation of present phenomena, they often write about their findings knowing the probability of observing the same phenomena in the future if the same conditions are encountered. And they often weigh evidence and make arguments based upon how rigorously scientific methods are applied, whether the results have been replicated, and how well the model explains the data. Authors of literature, on the other hand, draw on human experiences to create their works, and use literary devices that help them emphasize themes that they draw from those experiences. A literary author has the freedom to write without evidence that an event occurred, so a critique of literature often relies on a critique of the craft of writing and a reader's interpretation of meaning. Because of these and other epistemological differences among the disciplines, the Project READI team knew they would have to focus on history argumentation separately from literary and scientific argumentation.⁵

In the first year of the project, the researchers formed three design teams—one for history, one for science, and one for literature. The history team was composed of literacy and education researchers, historians, and history teachers. Together, the team read and

discussed existing literature to determine the salient knowledge, skills, and practices that were involved in comprehending history texts and constructing history.⁶ These analyses produced a set of “Core Constructs for History” that helped to determine what students needed to know and be able to do in order to comprehend and construct evidence-based arguments in history. The Core Constructs assumed general comprehension strategies as well as history-specific literate practices, such as paying attention to when, why, and by whom a particular document was produced. We also looked at Standards 7, 8, and 9 in the Common Core State Standards (the ones that deal with “integration of knowledge and ideas”) and aligned our analyses with those.

During the second year of the project, the team developed two history literacy modules designed to foster evidence-based argumentation. These units were designed to: (1) help students understand the beliefs and practices of historians, (2) provide instruction in reading and writing using history-specific analytic lenses (such as cause/effect and categories of societal structures such as political, social, or economic), (3) highlight various genres used in history (e.g., primary documents, such as newspaper accounts, memoirs, maps), and (4) provide student-friendly tools for analyzing and writing about history. The history teachers on the team used the units in their classrooms and participated in the research team’s process of documenting and reflecting on students’ reactions and performances, as well as the challenges faced in doing the implementation. These challenges included the use of “drop-in” modules that did not mesh well with their required curriculum.

In the third year of the project, the team developed READI learning goals that the teachers incorporated into their existing content units. The teachers were asked to teach the units and take reflective notes on teaching and learning through the year. The rest of the team spent time videotaping, taking field notes, and documenting student experiences.

The next part of this paper describes the READI learning goals for history, while a section later in the paper discusses the way in which they were incorporated by one eleventh grade U.S. history teacher. The team started out the year expecting each of the learning goals to be taught, but they were unsure of how the teacher would deepen students’ experiences with them as the year progressed. This

idea of a progression of discipline-based literacy skills is fairly new. Numerous document-based resources exist for history reading and writing activities (for an excellent example, see the Stanford History Education Group website at <<http://sheg.stanford.edu/us>>). Yet the idea that discipline-based literacy practices should not only be initiated, but also built upon by asking students to engage iteratively in more complex forms of these practices using primary, secondary, and tertiary texts is one that seems not well instantiated in the various teaching materials now available.

READI Learning Goals for Instruction

The READI team developed six learning goals that reflect an integrated instructional approach to the Core Construct knowledge, skills, and practices that drove the development of the initial units. The learning goals were intended to guide the instructional design as well as the assessment of progress toward the goals. The six READI learning goals in history are:

1. Students engage in close reading of historical resources, including primary, secondary, and tertiary documents, to construct domain knowledge. Close reading encompasses meta-comprehension and self-regulation of the process.

Reading closely is just as important and relevant to the study of history as it is to the English Language Arts. Through close reading in history, students learn what the text says (literal comprehension), what the text is doing, and its larger meaning. These processes inform analysis and evaluation of the information, processes that are detailed in additional learning goals (Goals 2-6) discussed below. Close reading is in service of these other goals.

When prompted, historians have been found to be actively reflective about the processes they use to read history text, and they explicitly regulate how they read.⁷ Thus, a close reading goal includes these attributes. We wanted students to engage in the process of close reading as historians do.

2. Students synthesize and reason within and across historical resources using comparison, contrast, corroboration, contextualization, sourcing, and other historical inquiry processes.

Historians have particular ways of interpreting what they read and study about the past. They consult many sources of information because they know that no single source tells the whole story. They compare one version of events with another, looking for consistencies and inconsistencies across different versions. They interpret a document based upon its place in history, about what was happening at the time and how the document fits into that milieu, the chronology of events and activities, and how it helps them make claims about aspects of history such as cause/effect and significance. Like historians, we wanted students to engage in these processes in order to identify, understand, and make claims about significance, cause/effect, and other insights into the past.

3. Students construct claim-evidence relations, using historical evidence and explaining the relationship among pieces of evidence and between evidence and claims. Historical claims interpret the past. The interpretations are grounded in historical evidence (written documents, eyewitness testimonies and artifacts from the period of study) and informed by the work of historians on the subject. These claims, which form historical argument, may be expressed as descriptive, explanatory, or narrative accounts.

Historical arguments explain the relationships among pieces of evidence and the reasoning that connects evidence and claims. For example, a historian may describe and discuss the evidence itself, show how various pieces of evidence together build a cohesive picture, or show how a particular perspective made sense within the context of the times. We wanted students to engage in historical argumentation themselves by learning to analyze evidence, create claims, and explain how the evidence connects to the claim.

4. Students use interpretive frameworks such as societal structures (e.g., political, economic, technological), systems (e.g., feudalism, colonialism, Jim Crow), patterns (e.g., periodization, individual vs. mass agency, immigration, industrialization), and schools of historical thought (e.g., idealism, material determinism) to analyze historical claims and evidence.

Interpretive frameworks are the lenses historians use to analyze the past. These lenses allow them not only to analyze claims and evidence, but also to create their own arguments and even their own

interpretive frameworks. We wanted students to become aware of all of these kinds of interpretive frameworks and use them in the development of their own arguments.

5. Students evaluate historical interpretations for coherence, completeness, the quality of evidence and reasoning, and perspective.

In order for historians to create plausible interpretations of the past, they must evaluate what they read, and so must students. In order to evaluate a historical interpretation (argument), they must be able to read the argument closely and analyze it on a number of levels. We want students to recognize the work of historians as argument, as well as have the tools to comprehend, analyze, and evaluate them.

6. Students demonstrate understanding of the 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.

This last focus is the most overarching of the six—encompassing understandings gleaned from each of the prior points. Students will be hampered in developing historical inquiry practices and achieving the other five learning objectives if they do not take up the epistemology of historians. However, many students view history as a set of facts to memorize.⁸ Rather than just hope that students, by working toward the other five goals, will come to view history as interpretation, the epistemology needs to be made explicit through document sets that contradict one another (provide conflicting accounts), through discussions about why historians read and write the way they do, and through opportunities to engage in reading, thinking, and writing like a historian.

Johanna, a high school teacher working with us in Project READI, co-designed and implemented instruction over the course of an academic year that was intended to provide students with opportunities to achieve these learning objectives. The design and implementation constitute an instructive case, because they illustrate how she introduced the goals and then deepened students' understanding of them, progressively improving their understanding and practice of history as the year unfolded. Johanna began by highlighting the sixth objective—confronting students' beliefs

about what history is—during the first week and then came back to students’ notions of history repeatedly though the year.

Johanna and her Eleventh Grade U.S. History Class

In the third year of the project, Johanna taught non-selective Advanced Placement classes in U.S. history at a school in the Midwest located in a working-class neighborhood with a large Latino/a population. Non-selectivity means that any student, regardless of achievement level, can opt into the course, and, thus, the achievement levels of students within her classes were wide-ranging, but overall somewhat lower than might be expected in a selective AP course. Johanna was expected to get students ready to take the AP exam, nonetheless, and, given the nature of writing on the AP exam, Project READI seemed a good match due to its emphases on argumentation and on the reading and writing of history. Johanna had taught history for twelve years (eight years at the same school), and had already participated in her own district’s disciplinary literacy initiative. In addition, she had spent the two previous years on the Project READI history team. As a member of that team, she had engaged in reading and discussion about the discipline of history. In the second year of the project, she helped to design and she taught the two units the team developed. During the third year, it was her task to move her students toward the six learning goals within the parameters of the College Board’s curriculum requirements.

As the year progressed, Johanna kept track of the instructional moves she made regarding these goals, noted students’ reactions to and performance on the history literacy tasks she gave them, and reflected on how such instruction might proceed in the future, given what she had learned from observing her students. At the same time she was teaching, she participated in bi-monthly meetings with the team where she reported on her progress, asked the team to weigh in on issues that concerned her, and discussed her next moves. Also, members of the team videotaped a number of her classes, debriefing those lessons with her. Members of the team acted as mentors and collaborators helping with the design of instruction and the gathering of appropriate materials.

At the end of the year, Johanna assembled her reflections and notes about instruction. What follows is a description of Johanna’s

first unit, so that readers can understand the interaction among the learning goals within the context of a unit. Then, we will explain the way each one of the goals was deepened as the year progressed and her units unfolded.

Unit 1: Exploration and Settlement

Johanna began the year with the idea that she wanted to disrupt students' previous notions of history as a static collection of dates and facts in favor of a dynamic view of history as interpretation and argument (Goal 6: Epistemology). So before instruction began, she asked students to reflect in writing an answer to the question, "What is history?" She asked this question to get students' current views on the table. As they proceeded through the unit, this topic (What is history?) came up at several points, and she asked the same question at the end of the first set of readings to see if she was, indeed, successful in initiating students' shifts in their original views about history. Johanna knew that students also needed to distinguish between inferences (claims) and observations (evidence); this distinction was critical if students were going to understand the way in which historians interpret (what they infer) from the historical record (what they observe). She had students bring in artifacts, and to generate observations, inferences, and questions, she asked them to explain the role of artifact in historical analysis.⁹ Johanna noted that students had a difficult time discerning differences between observations and inferences, and she would have to provide more instruction.

Since the College Board curriculum specified beginning with the exploration and settlement of America, she decided to teach students about Columbus' exploration of land off the coast of the American continent, knowing that there were conflicting interpretations of his interactions with the Taino population who resided there. Students wouldn't be able to hold onto a view of history as "Fact" if they negotiated among the conflicting interpretations and varied assemblage of evidence in a document set. She began her unit with a question, "Were the Spanish interactions with the Native Americans better defined as contact between the two groups or conflict?"—reflecting two dominant interpretations by historians. Students would need to engage in historical inquiry to answer the question,

using sourcing (paying attention to who wrote the documents, for what purpose, to what audience), corroboration (agreements and disagreements across documents), and contextualization (the period in which the documents were written and what was going on at the time). These historical inquiry skills are in service of Goal 2: Synthesize Across Historical Resources.

In order for Johanna's students to answer the focal question, they had to do close reading of the documents she provided (Goal 1: Close Reading). Finding that her students had difficulty understanding the concept of close reading, she modeled *how* to engage in it in a think-aloud with a text, focusing on questioning the text and clarifying meaning. Then, she explicitly discussed with students *what* she was doing and the way it helped her understand the document (*why she did it*). As she presented the texts they would read, she asked them to engage in close reading, and they discussed and engaged in close reading through the rest of the year.

The texts Johanna had her students read are described below, in the order in which they were assigned:

- *Columbus, the Indians, and Human Progress*.¹⁰ This text is a secondary source. Howard Zinn argues that the Spanish colonization brought more harm than good to the indigenous people of North, Central, and South America, relying on evidence from the journals of Dominican Friar, Bartolomé de Las Casas. Zinn describes the Spanish colonization as a ruthless moment in world history.
- *History of the Indies*.¹¹ An excerpt from de Las Casas' journal, this primary source document presents strong opposition to the Spanish encomienda system, describing in detail the horrific treatment of the natives at the hands of the Europeans. The British commissioned the journal fifty years after Columbus' first voyage. Zinn relies heavily on this document as evidence for a "conflict" interpretation in his chapter.
- *The American Pageant*.¹² This AP history textbook chapter is a tertiary source (drawing from primary and secondary sources) and provides evidence supporting both "conflict" and "contact" interpretations. Like Zinn, this text uses the de Las Casas journal as evidence, but also includes other evidence to achieve a balanced view, with somewhat more weight on the notion of contact and the notion of a Columbian exchange.

- *Columbian Exchange Map*.¹³ A secondary source, this map details the exchange of products from Europe, Africa, and Asia to the Americas and vice versa, showing the “Columbian Exchange”—a “contact” interpretation.

Johanna’s inclusion of multiple texts with different source types (primary, secondary, tertiary) and genres (map, journal, textbook, trade book) was necessary to address Goal 2: Synthesize Across Historical Resources. But Johanna did more than just assign the readings and ask them to synthesize. She also asked students to consider how the type of source might impact the message. For example, a textbook normally presents a broad view of history with a more balanced interpretation, fewer details, and less discussion of primary source evidence than might be found in a trade book. A journal or other primary source document would be even more focused than a trade book, often presenting a one-sided perspective. This discussion addressed aspects of Goal 2, but also led to an awareness of the varied kinds of claims and evidence to be found in different source types, beginning to address Goal 3: Claims and Evidence. These discussions took place across the unit, as they encountered the different texts.

As students read and discussed the documents, Johanna provided them with various supports in line with Goal 2: Synthesize Across Historical Resources. For one, she introduced the SOAPStone approach—Speaker, Occasion, Audience, Purpose, Subject, and Tone—to support students’ ability to engage in *sourcing* and *contextualization*, practices of historians.¹⁴ As she watched students use the acronym with the de Las Casas primary source document, she found that, whereas they *did* attempt to make sense of the speaker, they left other source information untouched, and very few students marked information in the text that helped them identify tone or perspective. Her response was to engage in a think-aloud where she explicitly noted *what* sourcing the document meant, *how* to work through the elements of the acronym, and *why* it was necessary. Her end goal was to be able to tell students to “source” the document and have them not only identify the elements in SOAPStone, but also think about what each meant for a document’s perspective and credibility. At this point, however, they were still struggling with the acronym at a more rudimentary level. Johanna also provided them with instruction in annotation (marking the text and writing in

the margins) and in the use of various notetakers (graphic organizers such as charts and idea maps).

One important aspect of the question, “Were the Spanish interactions with the Native Americans better defined as contact between the two groups or conflict?” is that, in order to answer it, students must make a *claim* and support the claim with *evidence*. But students had very little experience identifying written claims and evidence in the history text, much less in making their own claims and choosing the best evidentiary support from information across texts (Goal 3: Claims and Evidence). Johanna originally helped them first construct a claim (The Spanish exploration of the New World is an example of *conflict/contact*), then asked them to look for support in the texts, using an “evidence” notetaker. Doing so required students to return again and again to the texts they had read to reweigh the evidence in light of new information. This took time, so Johanna intentionally limited the number of texts. But when she read their responses to the question and their completed notetakers, Johanna saw that, whereas students were capable of making a claim, very few actually supported their position with evidence *from the texts*. She realized it would be better if she had required them to weigh the evidence for “conflict” against the evidence for “contact” before making a claim, and she vowed to make that change in future instruction. What she was successful at doing, however, was to introduce the idea of claim and evidence.

In reading about what happened to the Taino population as a result of their being “discovered” by Columbus, Johanna’s students began to grapple with the notion of sourcing and its relation to perspective (Goal 2) and the idea that historians studied history through different interpretive frames (Goal 4: Use Interpretive Frameworks). Students read that Zinn liked to interpret history from the position of the underdog. This understanding about Zinn helped students contrast his approach to history with that of Bailey in *The American Pageant*, and they were able to look at Zinn’s word choices as a way to see how his approach became evident in his writing. Later in the unit, Johanna introduced *cause and effect*, teaching that these could be further categorized as political, social, economic, religious, etc. (Goal 4: Use Interpretive Frameworks). As students began to study English exploration, for example, she focused on social and economic causes, discussing how these could be defined and asking

students to complete a “causality” notetaker where they indicated if the cause was social or economic. Because students still struggled with this assignment, she noted that she would in the future ask students to indicate their reasoning for calling particular causes social or economic. Johanna’s ultimate aim was to expand students’ notions of frameworks, including other kinds of historical patterns, in line with Goal 4. At the end of the first unit, however, they had just begun to *identify* some historical frameworks.

To provide a reasonable answer to the guiding question about contact or conflict, students had to be able to choose the best evidence in support of their claim, and choosing this evidence entailed corroboration (looking for agreements and disagreements across texts), which was a historical reasoning skill (reflecting Goal 2: Synthesize Across Historical Documents), and evaluation (reflecting Goal 5: Evaluating Historical Interpretations). An interesting thing about the texts she assembled was that both historians, Bailey and Zinn, used the de Las Casas journal as evidence, but in different ways. Zinn used it as his primary source of evidence, whereas Bailey mentioned it along with a number of other pieces of evidence, ultimately supporting both contact and conflict (a balanced approach), with perhaps slightly more emphasis on a “contact” interpretation. The difference in evidence used by these two authors really jumped out at students, who were surprised that the authors could have such different takes on Columbus, and this surprise led to interesting discussions about the interpretive nature of history, the practices of historians, and the reasons why these two sources might have differed (Goal 6: Epistemology). They also began to make some distinctions about the weight of evidence and began to evaluate somewhat negatively the coherence and completeness of Zinn’s argument, addressing Goal 5: Evaluate Historical Interpretations, albeit at a fairly superficial level at this stage.

Johanna ended the lesson about Columbus with their answers to the guiding question about contact and conflict and their reflective writing on the question, “What is history?” She found movement reflecting changes their notions of history as fact, but she had only introduced them to historical frameworks, reasoning across resources, claims and evidence, close reading, and evaluation. Although she was able to help students *begin* to engage in historical thinking and argumentation, students ended the unit still as beginners. Johanna

had quite intentionally focused on *all* of the goals in the first unit, because she knew this broad focus would give her information about where her students stood on each one. As students completed the unit, Johanna was constantly assessing, taking stock of what students had learned and what the next steps should be, reflecting on what she had done well and on what she could improve. At the end of the first unit, she was already refining her ideas about how she wanted to deepen the goals as the year progressed.

What follows is an explanation of the way in which she deepened instruction on each goal. The goals are discussed separately, but this discussion of the first unit should help you understand that the separation is artificial—they are always interacting.

Deepening the Goals

1. Engage in close reading of historical resources, including primary, secondary, and tertiary documents, to construct domain knowledge. Close reading encompasses meta-comprehension and self-regulation of the process.

Johanna taught students close reading primarily in the first unit. However, close reading practices were reinforced with each subsequent unit, as it became “the expected common practice.” That is, Johanna would ask them to give a “close read” of the texts for each of the particular units and she would expect them to know that close reading meant to dig into the text for disciplinary purposes, even though these disciplinary purposes might change somewhat based on what a text could afford. For example, a close reading of a map or a photograph or a memoir would proceed somewhat differently, and she helped students understand this by asking such questions as, “How will you go about making sense of this source?”; “What will this kind of document tell you that another kind of document might not?”; “What information is left out of sources like this one?” As the year progressed, Johanna slowly increased the number of and complexity of the texts and text types they read, so that by the end of the year, students were reading longer, more complex texts and larger text sets, including texts the students chose themselves.

Johanna asked students to annotate as they read and she also provided them with notetakers to guide their reading. As she reflected on the year, she noted that some students didn’t annotate

very much, and she planned in the future to emphasize more strongly the role of annotation in revealing students' thinking about the text, thus providing her a window into at least an approximation of their reading processes.

Johanna also stressed the kind of persistence and collaborative environment necessary for close reading to succeed. Students were grouped in fours, and they grappled with text meaning together. Her personal challenge, which she continued to work on as the year unfolded, was to step back and let the grappling proceed. A dynamic teacher, Johanna was used to jumping in and explaining difficult text and concepts to students, and she had to constantly remind herself that always providing students with *her* interpretations wasn't going to help them develop their own.

In summary, Johanna began the year by having students read only a few texts at a time, carefully choosing them with disciplinary purposes in mind, and modeling and providing practice in reading closely for those purposes. As the year progressed, she increased the number, length, and complexity of the texts students were assigned to read and ensured that students had the opportunity to read and reflect on most of the genres of text that historians used. She also helped them to engage in reflective text choice. By the end of the year, students were reading longer, more complex texts in a variety of genres, many of which they chose themselves and without constant modeling and reminders.

2. Synthesize and reason within and across historical resources using comparison, contrast, corroboration, contextualization, sourcing, and other historical processes.

In the second unit, Johanna continued to work on the connection between who an author was, what they said, to whom they were speaking, etc., to the perspective they presented, using the SOAPStone acronym. She asked students to *source* and *contextualize* a document and also look at an author's word choice. She found that students could identify particularly loaded words and what they might mean for an author's perspective, but couldn't actually point to evidence in the text that they were right about what they meant. She modeled how one might look for evidence in the text to support their interpretations and worked with students on the process as they grappled with the ideas in small groups.

Johanna reinforced the processes of sourcing and contextualization as the year progressed, and added corroboration. If students found discrepancies in interpretations across sources, then their explanations of those discrepancies had to take into account who wrote the document, for what purpose, and under what contextual circumstances. In Unit 3: Early Republic, Johanna had students read multiple documents to answer an essential question. As in the first unit, students were able to note the inconsistencies among the texts, but they needed support to explain the inconsistencies in a reasonable way. Johanna believed that students' lack of information about the *context* of the information in the texts was hindering their reasoning, and so, in Unit 4: Jacksonian Democracy, she modeled reading the textbook as a way to gain critical contextual information about the time period and possible purpose of the particular documents. At this point in the year, she began to introduce students to Document-Based Questions (DBQs), and to do this, presented them with a notetaker by a fictitious student who had assembled evidence to answer the question. Students had to critique this evidence, and one of the questions asked, "What outside information could be added to make this more complete?" She asked this question in order to reinforce the necessity for contextual information when reasoning about evidence. In Unit 5: Manifest Destiny, students examined the source information of four historians who had written at different times. Again, Johanna wanted students to understand how what was happening at the time of the writing (the context) could impact a historians' interpretation. She found that students didn't really know when the major events of the twentieth century occurred, so they couldn't look at the date a text was written and draw connections to what was happening. She had to construct a timeline of the most important twentieth-century events with them in order for them to make those connections. She modeled the process of reasoning using the first author, then had students work on the rest in small groups, but later decided she should have asked them to practice using the next author as a whole class. To make it clearer to students why an author's perspective is important, she let them read a primary source and asked, "Would each of these authors use this source, and, if yes, how would they use it?" This assignment motivated thinking about an author's perspective and how that affected their use of evidence. In Unit 5:

Jacksonian America, she asked students to find their own primary sources to help them answer an essential question. Students had to have some criteria for choosing the sources and had to explain their reasoning.

She came back to the idea in Unit 6: The Civil War. In this unit, Johanna had students examine source information of four primary sources, all written by the same speaker, in order to study how the context of the time affects what one person says. She wanted students to understand that a speaker's position often changes over time as the context changes, and she wanted students to be able to explain the changes in tone and meaning, pointing to places in the text that signaled the change. How did students do? Johanna found that they were able to source and contextualize each document in isolation, but students had a difficult time chronicling the change over time across the documents. To help them, she focused their attentions to one issue at a time (e.g., slavery) and engaged in think-alouds, sharing with them her process for noting changes across documents.

By March, in Unit 7: Reconstruction, Johanna again asked students to assemble evidence, this time across both primary and secondary sources, to answer an essential question in a debate setting. Students had to engage in a more complex assemblage of evidence across documents in order to find the best evidence to defend their positions, and this required paying attention to the source and context of each document and their level of corroboration.

As students progressed through the year, each time they were presented with new texts, they were prompted to "source" them. Also, whereas at the first part of the year, she had made sure that necessary sourcing and contextual information was a prominent part of each text assigned, as the year progressed, she did not provide the information if it was not on the text already.

Johanna noted that students finished the year with a definite understanding of source and context and the role that each plays in interpreting possible messages in a text. They could automatically source documents, even when not prompted, and even when they had to search for sourcing/context information. They were also able to note inconsistency in the way history was interpreted across sources and had begun to use reasoning about the source and context to explain these inconsistencies. However, progress on the instructional progressions was not universal nor uniform. Johanna reported that

some students continued to have difficulty pointing to direct textual evidence of the role source and context played, and in synthesizing changes in perspective that could occur over time and identifying places in the texts that signaled those changes.

In summary, the progression of instruction began with sourcing and contextualization as a way to identify a historian's approach to the past and to look at the perspectives of the authors of historical documents. Students also began to look at authors' choices of words as a reification of their perspectives. The progression continued as Johanna continued to help students refine the way they thought about sourcing and contextualization and helped them develop a contextualized understanding of an event if they did not have one initially. It continued still as she introduced the idea of corroboration, asking them to compare and contrast the perspectives of different authors and to note the changes in perspective of the same authors over time. The progression ended with students being asked to use sourcing, contextualization, and corroboration to choose information across texts that they could use in forming their own arguments.

3. Construct claim-evidence relations, using textual evidence and explaining the relationship among pieces of evidence and between evidence and claims. Different types of historical sources (primary, secondary, tertiary) provide difference kinds of evidence.

Readers may have noticed that claim-evidence relations are a large part of what drives historical reading practices such as sourcing, contextualization, and corroboration. In making a claim to answer a historical question and supporting the claim with evidence, students must read across documents, synthesize, and, when there are disparities in the claims and evidence they see, try to determine what drives those differences, so that they can choose the best evidence and create a claim based upon it. That means, of course, that students have to recognize claims and evidence in primary, secondary, and even tertiary sources.

Student discussions of claim-evidence continued from Unit 1 into Unit 2, where students were asked to pay attention to the "kind" of sources that might best answer particular questions. For example, she asked students to note the differences in a diary, an official government document, and a letter to a personal acquaintance in terms of the kinds of information these primary sources could offer

and the perspectives that were portrayed. What claims could they make, given the information in them and the perspectives they represented? Johanna also engaged students in a discussion about what it means to *evaluate* versus *analyze*, so that they could provide more accurate claims in response to writing prompts. Johanna was surprised at this point that students were wrestling with how to explain why particular information was evidence for a particular claim. That is, they had difficulty explaining the reasoning (their warrants) behind choosing certain evidence as most relevant to their claims. As well, she noted that the difference between observations and inferences still often confused them.

Because of the difficulty students were having, in Unit 3: Early Republic, Johanna again had students consider the difference between observation and inference (she had first introduced this at the beginning of the year). She modeled the process of observing and drawing inferences, and students completed an observation/inference chart. She decided at that point that she should use non-text sources with students to provide more concrete practice in the skill. In Unit 4: Jacksonian Democracy, she asked students to make observations and draw inferences from an election and a voter map. At the same time, she continued to work on analyzing a data-based question. Students focused on the kind of evidence that one would gather to answer the question, including evidence from outside the text, and they worked through an exemplar essay to note the various elements of argument writing. In Unit 5: Manifest Destiny, she shared the citation page from each historian's works and students discussed the kinds of evidence each historian had used. She reflected after that lesson that she should have focused more on comparisons and contrasts among the texts cited, but this lesson did give students a view of how historians thought about evidence and where they found it. In Unit 6: Civil War, she expanded the notion of claim and evidence to encompass one's views on "change across time" questions. A "change across time" question is difficult because students have to have some way of discussing change, such as chronology (e.g., "But by 1865, the union no longer...") or comparison/contrast (e.g., "Whereas before the Civil War, the North...*after* the Civil War, they..."). To make the idea more concrete, Johanna created a scenario chronicling the changes a fictitious student might go through during her high school years.

At the end of the year, students were still struggling a bit with explaining *why* they chose certain pieces of evidence (their *warrants*) to support their claims, and Johanna noted the necessity of additional instruction on this part of argumentative writing in future years.

In summary, the progression of instruction in subsequent years would begin with a focus on the difference between observing something and making an inference or a claim that is based on that observation, progressing to an evaluation of the strength of the tie between the observation and the claim. Then students would discuss affordances of various kinds of primary documents in providing evidence for claims. As the year progressed, she would complicate their ability to make claims by introducing them to various kinds of claims, including those involving “change over time” and the evidence one needed to back up those kinds of claims.

4. Use interpretive frameworks such as (1) societal structures (e.g., political, economic, technological), systems (e.g., feudalism, colonialism, Jim Crow), patterns (e.g., periodization, individual vs. mass agency, immigration, industrialization), and schools of historical thought (e.g., idealism, material determinism) to analyze historical claims and evidence.

After the first unit, Johanna didn’t bring up interpretive frameworks again until Unit 4: Jacksonian Democracy. When students analyzed the fictitious student’s preparation for a DBQ mentioned earlier, the piece they analyzed was a student’s attempt to categorize evidence as political, social, and economic. Some of the information was miscategorized, and this allowed students to discuss the characteristics of each of the categories. In Unit 7: Reconstruction, they engaged in a categorization process again. This time, as they prepared for an in-class debate, she had them pre-categorize the evidence they were going to use and explain why they categorized it that way. Johanna noted that this activity really seemed to help them make points in the debate. She encouraged them to look beyond simple categorizations such as political, social, or economic, but to see the nuances in these. For example, a social argument could be about gender, class, race, or other social media. By the end of the year, however, Johanna saw that she could deepen students’ ideas of interpretive frameworks even more. Students still needed to consider other kinds of interpretive lenses in historical

arguments such as schools of historical thought or overarching themes, and they still had not considered their own interpretive lenses. In subsequent years, she planned to require students to take on a particular lens as they collected evidence, made a claim, and wrote an argument.

In summary, the progression of instruction moved from the identification of the way historians classified causes and effects by societal structure (such as saying a cause was political or economic), to their being able to use those classifications to reason about history on their own, to their being able to think about subcategories of the structures. In subsequent years, Johanna would have the progression continue so that students would begin to think about their personal lenses on history and to develop some awareness of themes that recur across different eras and geographical boundaries (such as the movement of peoples).

5. Evaluate historical interpretations for coherence, completeness, the quality of evidence and reasoning, and perspective.

At first, Johanna was mainly interested in students being able to recognize evidence so that they could evaluate it. In Unit 4: Jacksonian Democracy, she had students identify evidence as they read a textbook chapter and an excerpt from a historian's work. She was pleased that they were drawing connections between the two readings. Both texts were using similar evidence to make different claims about Jacksonian Democracy, so she had students engage in small-group discussion to answer questions about the evidence using historical reasoning, and then asked them to write an exit slip explaining that reasoning. She noted, however, that her questions failed to elicit discussions that addressed type and *quality* of evidence. So, within the same unit, Johanna asked students to read and critique a student-written essay, focusing on the evidence and interpretive lenses represented there. She provided them with a set of discussion questions to prompt their evaluations. Students were highly critical of this piece of writing in a general way, even though it was well written, so, in whole-group instruction, Johanna helped them focus on particular details and engage in a critique of specific aspects of the writing. She returned to the process of evaluation in Unit 5: Manifest Destiny, where she had students write a list of criteria to judge historians' arguments, with specific emphasis on the

evidence each historian uses. They brought up those elements of evaluation they had discussed in Unit 4, and she probed their thinking about criteria in order to get an optimal list. They then used this list in subsequent units to remind them what they could evaluate. By the end of the year, students were becoming more sophisticated in their evaluation of historical claims and evidence and in making choices about the evidence they would use in their own writing.

In summary, instruction progressed from students' working on identifying claims and evidence and the differences in these across two texts by different authors (Goals 3 and 4) to being able to evaluate the quality of evidence, beginning with a guided identification and evaluation of the evidence and lens in a student essay through a set of focused questions. Instruction progressed with a list of evaluation criteria they then used to evaluate future reading and to guide their own writing of arguments.

6. Demonstrate understanding of the epistemology or underlying beliefs, seeing history as inquiry into the past, seeing it as competing interpretations that are contested, incomplete approximations, open to new evidence and new interpretations.

Each of the previously described activities in some way facilitates a student's adoption of the epistemologies of historians. For example, In Unit 4: Jacksonian Democracy, Johanna helped students understand the notion that historians use interpretive frameworks when gathering evidence from the historical record by asking the students to consider the historian's process of constructing historical narratives using these frameworks. She noted, however, that she also needed to have students consider *why* historians used them in order to reinforce the idea that a historian's framework influences their interpretation. In Unit 5: Manifest Destiny, students discussed contextualization as a window into historian's reasoning. Johanna had students compare the work of four historians in that same unit to highlight the notion that different historians use different sources of information, and that this variation in sources, as well as variation in the context within which they are writing, can lead to different interpretations of the same event. In evaluating the source and quality of evidence, students were engaged in critiques of the plausibility, completeness, and coherence of historians' interpretations. These, in sum, all led students to conclude that history is the "creation and

defense of evidence-based interpretations of past events,” Johanna’s preferred definition of history. Students both adopted and acted within this perspective of history throughout the year.

In summary, the progression of instruction began in Unit 1, with Johanna’s attempt to disrupt common notions of what history is by presenting students with accounts of the past that didn’t agree. The progression continued through the work already discussed in relation to the other five goals, so that each time instruction was deepened regarding those goals, Johanna used that as an opportunity to bring students back to reconsiderations of the definition of history. She had them write their thoughts about history numerous times throughout the year so that by the end, the creative and dynamic nature of historical interpretation was well instantiated.

The progression of instruction is summarized in the **Appendix** and illustrates how the goals progressed in tandem, deepening student understanding over the year. The rows depict the deepening of each learning goal across the year. The columns show the foci of the six goals at three points in the year.

Analyzing Johanna’s Work

The six goals Johanna deepened throughout a year’s worth of instruction provided opportunities for students to be introduced to and to increase their command of the literacy practices of history. The big picture outcome is that these students ended the year with some idea of *how* to approach the reading, reasoning, and writing involved in historical argumentation. They had been able to adopt, to an extent, the literacy practices of historians. The skills and abilities they worked on for the year should help them to engage independently in the type of historical reasoning expected of sophisticated college students and, as well, to allow them to become informed citizens. Johanna’s instruction had these unique aspects.

Planning

Having had long discussions of Johanna’s instructional plans, the history team can vouch for the thoughtful way in which Johanna assembled her instruction. For each lesson, she had to be clear about what learning goals she was highlighting and she had to choose texts

that afforded instruction in those goals. Text choice was sometimes a daunting task. Note, for example, the interplay of texts required to disrupt students' naïve notions of history in Unit 1. These texts represented different types (primary, secondary, tertiary), different genres (textbook chapter, monograph, map, journal), and different positions (conflict, contact, balanced). Too, they were focused on the historical era the College Board required her to study (Exploration and Settlement) rather than about a topic of convenience, and they were optimally challenging for students given their levels of reading achievement. Before choosing the texts, Johanna had to read these and a number of others carefully with her learning goals and all of these other concerns in mind. Needless to say, Johanna spent many summer days doing this work.

Johanna also had to be sure that the tasks in which she asked students to engage were actually focused on the goals and that her assessments gave her information about the extent to which the goals were met. In other words, she had to ensure explicit connections among goals, tasks, and assessments. If she had not connected these, she would not have been able to understand what her students could and could not do, and she wouldn't have been able to adapt her instruction to their needs.

Adaptability

Johanna would be the first to tell you that she did not always get things right. Sometimes, students surprised her in their lack of uptake of the instruction, and she had to make both instantaneous adaptations to her lessons and long-term planning changes. She was able to do this because she paid attention to her students, using a number of informal assessments to gauge how they were doing. These assessments took the form of exit slips, in-class and homework assignments, group and individual projects, and observations of group and whole-class discussions. She looked at these assessments as windows into student thinking; she used this information to try to meet them at the points of understanding they demonstrated. Often, Johanna noted that she had not been quite explicit enough in her probes and discussion starters, so that students misinterpreted the task. Sometimes her lack of specificity was taken up by students as permission to be under-analytical. Sometimes, she found that

students lacked knowledge; for example, they didn't know when many of the major events in history took place, so that they weren't able to contextualize a piece of writing. Sometimes she found that students experienced conceptual confusions. For example, they were unable to distinguish observation from inference or to differentiate social, political, and economic causes and effects because they did not have clear criteria for each. In each of these instances, Johanna reflected on what she could change in her instruction to clarify confusions and move students' thinking forward.

Focus

Even at the outset in a year in which she was trying out many new instructional moves, Johanna had an idea of where she wanted her students to end up in June. She had already thought about ending points for each of the instructional goals, and this allowed her to focus her instruction on getting there. Sometimes she had to alter her expectations, however, deciding ultimately to move students further than she had originally planned. For example, as the year progressed, Johanna began to think about historical frameworks in much more nuanced ways than she had at the beginning of the year. Whereas she had originally expected students to identify political, social, economic, and other categories of causes and effects, to recognize an author's preferences, and to use those categories in their own writing, she added instruction to help students recognize more specific categories (e.g., race, gender, and class being finer grained social categories) and ended the year knowing that she needed to move students even further, toward using different kinds of lenses such as philosophical or thematic ones and perhaps to reflect on their own unique lenses into history. In the next year, she altered her instruction with this new ending point in mind.

Sometimes, Johanna's expectations were not met. As the year ended, Johanna was still somewhat disappointed in students' ability to explain the reasoning or the *warrant* behind choices of claims and evidence. She knew that, to meet her expectations in subsequent years, she would need to provide instruction in historical warrants. Without an idea of what she wanted to see by the end of the year, however, Johanna would not have been able to track and adapt to students' progress, because progress is a movement towards a goal.

Knowledge and Beliefs

In order for Johanna to teach history and its literacies, Johanna had to understand, herself, the epistemologies of historians and the ways in which they interpret, communicate, and evaluate what happened in the past. She had to understand how unique the literacy practices of historians are and recognize that, in order for students to be sophisticated, independent learners of history, they, too, have to understand those unique literacy practices. Johanna had to believe that teaching students to read and write history would improve their understanding of history, in line with a growing number of research findings.¹⁵ Johanna was lucky enough to have had a number of opportunities to gain these insights, but not all history teachers have had those kinds of opportunities. In addition, Johanna had to be receptive to change, so that, as she commented during our meetings, when the opportunities appeared, she embraced them, knowing that she would spend some uncomfortable moments as she confronted new ideas.

Conclusion

This paper shares the instruction Johanna used across a school year to provide opportunities for students to achieve the six READI learning goals in history. By describing the learning goals, instructional moves, and assessments Johanna used and how they changed across the year, the authors hope to have provided a rich example of the introduction and deepening of the literacy practices of history. The description is not meant to be a blueprint, series of lesson plans, nor “best practices.” Each district often has unique curriculum requirements, and the topics and texts Johanna used may not be appropriate. However, Johanna’s integration of these learning goals and topical content illustrates a means of providing students with access to opportunities to engage in reading, writing, and reasoning practices that embody the literacy practices of history. Johanna’s students learned history, to be sure, but they learned more than names, dates, and events. They learned the literacy practices needed to engage in historical thinking through analyses of the kinds of rich sets of documents that are the focus of historical inquiry.

Notes

The authors participated in the writing of this paper; however, the work described here evolved over multiple years of Project READI activities that involved the entire history instructional design team, listed here in alphabetical order: Michael J. Bolz, Gayle Cribb, MariAnne George, Susan R. Goldman, Gina Hale, Johanna Heppler, Jodi Hoard, Michael Manderino, Jacquelynn Popp, Diane Puklin, and Cynthia Shanahan. Project READI is a multidisciplinary, multi-institution collaboration supported by the Institute of Education Sciences, U.S. Department of Education, through Grant R305F100007 to the University of Illinois at Chicago.

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Appendix

Progressions of Six Goals Across a Year in Johanna’s Classroom

Goal	Beginning	Middle	End
Close Reading	<ul style="list-style-type: none"> • Few texts • Few text types • Modeling and practice in close reading/annotation 	<ul style="list-style-type: none"> • More texts • More text types • Discussions about affordances of text types • Longer, more complex texts • Reminders about close reading 	<ul style="list-style-type: none"> • Student choice of texts
History Processes	<ul style="list-style-type: none"> • <u>Source/Context</u>: Identification of source and context; discussion of meaning • <u>Corroboration</u>: Identification of agreement/disagreement on one issue • <u>Relations among events</u>: Introduction to cause/effect 	<ul style="list-style-type: none"> • <u>Source/Context</u>: Discussion of characteristics and reliability of different text types; Author perspective changes across time (Same/different authors); Building context when it is lacking • <u>Corroboration</u>: More comparisons/contrasts • <u>Relation among events</u>: Identification of chronology; cause/effect; change over time 	<ul style="list-style-type: none"> • Student choice of text based upon sourcing, contextualization, corroboration; Building context on their own when it is lacking • Students writing of arguments that use chronology, cause/effect, change over time
Claims and Evidence	<ul style="list-style-type: none"> • Introduction to claim and evidence • Difference between observation (evidence)m and inference (claim) 	<ul style="list-style-type: none"> • Discussion of affordances of different types of text for particular kinds of claims and evidence; Introduction to different kinds of claims—chronology; cause/effect; change over time 	<ul style="list-style-type: none"> • Claims and evidence used by students in historical arguments they write

Interpretive Frameworks**	<ul style="list-style-type: none"> • <u>Societal Structures</u>: Classification of cause/effect into <i>political</i> and <i>social structures</i> 	<ul style="list-style-type: none"> • <u>Societal Structures</u>: Reasoning about more societal structures; Thinking about subcategories of societal structures 	<ul style="list-style-type: none"> • <u>Theories</u>: Identification and use of personal lenses and theories of history in writing arguments • <u>Themes/Patterns</u>: Identification, analysis, and writing about patterns across time and geography
Evaluation	<ul style="list-style-type: none"> • Evaluation of claims and evidence and the differences across two texts 	<ul style="list-style-type: none"> • Guided identification of characteristics of quality claims and evidence • Creation of a list of evaluation criteria 	<ul style="list-style-type: none"> • Use of the list of evaluation criteria in reading and in writing own arguments
Epistemology	<ul style="list-style-type: none"> • History defined by students • Disruption of students naïve notions of history 	<ul style="list-style-type: none"> • Reconsideration of definition of history 	<ul style="list-style-type: none"> • Reconsideration of definition of history

Note: Writing about history occurred throughout the entire year, but is not represented in this chart. Students engaged in informal writing and formal writing practices as they learned each new skill, so that by the time they were at the end of the year, they could write arguments independently without support.

**Johanna felt her students did not achieve everything she would have liked them to regarding interpretive frameworks in the first year of teaching, but expanded her work on the items in this section in subsequent years.