This is to certify that the

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One Veteran Teacher's Learning to Teach Across Her Career: Promoting Student Thinking in Middle School History Instruction

presented by

Helene M. Anthony

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Linda M. Anderson
Major professor

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# ONE VETERAN TEACHER'S LEARNING TO TEACH ACROSS HER CAREER: PROMOTING STUDENT THINKING IN MIDDLE SCHOOL HISTORY INSTRUCTION

By

Helene M. Anthony

A DISSERTATION

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ABSTRACT

ONE VETERAN TEACHER'S LEARNING TO TEACH ACROSS HER CAREER:
PROMOTING STUDENT THINKING
IN MIDDLE SCHOOL HISTORY INSTRUCTION

By

Helene M. Anthony

This study employed case study theory and techniques to describe and understand how one middle school teacher learned to teach US History over a career. Three broad questions shaped this study: (1) What teacher knowledge developed over the course of the teacher's career? (2) What appears to have brought about changes in the teacher's knowledge bases? and (3) How is the teacher's instructional practice influenced by her knowledge bases?

To explore these questions I observed the teacher throughout one unit of US History, and interviewed her about her teaching and her career. I collected the following data: (1) field notes of classroom observations in two class periods, (2) transcripts of interviews conducted over a three-month period, and (3) archival documents, for example, curriculum materials, school documents, and personal papers.

My analyses show that the most significant change in this teacher's history instruction over her career was the transformation of content to promote students' active processing of concepts and relationships. This professional development was influenced by three factors: teacher dissatisfaction, availability of knowledge and resources, and collaboration with a departmental colleague. The change in transformation of content was the result of the

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teacher's acquisition of general pedagogical knowledge from which she generated subject-specific pedagogical knowledge. The data suggest that the teacher may be on the verge of another significant change in her practice as she addresses new concerns about her students, and new resources in the school.

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To all the "Karen's" who have dedicated their lives to helping students learn.

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Completing a dissertation from a distance enlarges the circle of people who help you deal with paperwork and deadlines. I would like to thank Jo Colby, Geneva Spears, and the other wonderful people working in Erickson Hall, for their efforts to assist me with registration and the variety of forms that needed to be completed. I also want to thank Betsy Becker and Ralph Putnam for arranging my long-distance comprehensive exams. The second time around was made a little less stressful thanks to your cooperation! Finally, to my colleagues at Concordia College in Moorhead, Minnesota who covered for me when I had to be gone, and celebrated all my successes, thank you for your support and confidence.

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Taking this long to finish a degree gives a special responsibility to family and relatives as well. They want to put a little pressure on you without

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discouraging you, while still appearing hopeful. I always felt 100% supported by my relatives, and appreciate the fact that my parents and my Aunt Lena made the trip to Michigan to celebrate my graduation. Thanks for caring so much. To my husband, Bill, I want to say thanks for believing in me when I doubted myself. Surely you tired of hearing about the trials and tribulations concerning finishing my degree. Yet, you were there for me whenever I needed your support. To my step-daughters, Kira and Rachael, who have only known me as a doctoral candidate, I'm looking forward to spending time with you as someone who no longer thinks about working on papers, studying for exams, or writing a dissertation over holidays!

My final thank you goes to the wonderful 8th grade social studies teacher who volunteered to be the subject of my dissertation. Your willingness to allow me into your classroom, into your mind, and into your heart, was much appreciated. Had I not met you and been so inspired by your dedication to teaching, I may never have proposed a dissertation study to complete my degree. I have grown tremendously from working with you and value the friendship and professional relationship we have built. Thank you for allowing me to make your teaching experiences a learning experience for me.

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# CHAPTER 1

# INTRODUCTION

> Cognitive research shows that knowledge cannot be given to students. Before knowledge becomes truly generative - knowledge that can be used to interpret new situations, to solve problems, to think and reason, and to learn - students must elaborate and question what they are told, examine the new information in relation to other information, and build new knowledge structures. (Resnick & Klopfer, 1989, p. 5)

The view of knowledge and learning reflected in the above quote is dramatically different from earlier behavioral views, and has significant implications for what might be considered effective instruction in our school's classrooms. Just as knowledge cannot be given to students, new knowledge about teaching and learning cannot be given to teachers. The focus of this study was to examine the different types of knowledge developed by an experienced teacher over the course of a career, the factors that influenced that development, and the ways in which such knowledge may impact one's teaching. A veteran middle school teacher was interviewed about her twenty-nine years in teaching. She was also observed teaching a four-week long unit in US History for two 45-minute periods each day, and was interviewed before, during and after the observed unit. The following background information provides a rationale for this study.

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**Instruction for Conceptual Understanding and Active Learning**

During the past twenty years cognitive research has contributed to a gradual and growing consensus about the nature of learning. The behaviorist perspective has slowly been replaced by a cognitive-mediation perspective which emphasizes the active construction of knowledge by the learner as well as the social nature of this act (Anderson, 1989a; Bruner, 1990; Resnick, 1991; Rogoff, 1990). The characteristics of knowledge that is useable rather than inert have also been addressed (Resnick & Klopfer, 1989; Marzano et al, 1988; Wittrock, 1992). For example, there is general agreement that students should be developing networks of highly-interconnected and elaborated information rather than pursuing the memorization of isolated facts or routines. Students should also be developing knowledge of and about their own learning strategies. Finally, how teachers can facilitate students' active construction of usable knowledge in classrooms has been addressed (Anderson, 1989b; Brophy, 1989; Cohen, McLaughlin & Talbert, 1993; Jones, Palincsar, Ogle & Carr, 1987; Marzano, 1992). In classrooms where students are actively constructing knowledge,

> students talk with one another, as well as in response to the teacher, and they learn to talk about and reflect upon their own thinking, questioning, negotiating, and problem-solving strategies. (National Center for Research on Teacher Learning, 1993, p. 3)

In addition to the professional literature which attests to the need for this kind of meaningful learning to take place in our schools, there has also recently been considerable attention given to what this type of teaching might require of teachers.

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## Teacher Mediation of Curriculum

Research on both teacher thinking (Clark & Peterson, 1986; Elbaz, 1991; Fenstermacher, 1994) and curriculum development (Connelly & Clandinin, 1988; Snyder, Bolin & Zumwalt, 1992) has demonstrated the important role of the individual teacher in planning and implementing curriculum. The teacher's role is not merely as a technician who efficiently follows guidelines and directives in textbook materials. Rather, the teacher's role

> is as a curriculum developer who, together with his or her students, grows ever more competent in constructing positive educational experiences. ... The externally created curricular materials and programmed instructional strategies at the heart of the fidelity and mutual adaptation perspectives [of curriculum implementation] are seen as tools for students and teachers to use as they construct the enacted experience of the classroom. (Snyder, Bolin & Zumwalt, 1992, p. 418)

These studies have drawn attention to the fact that the teacher mediates the curriculum by using her own knowledge and beliefs about subject matter, learners and teaching, for example, to create the curriculum in practice (Hawthorne, 1992; Thornton, 1991).

Shulman's (1987) work on teachers' pedagogical thinking, and the knowledge bases used in this thinking, sparked a number of studies that explored how teachers transform their subject matter knowledge into instructional practice (e.g., Grossman, 1990; Gudmundsdottir, 1991; Wilson, 1991). This line of research, as well as others (e.g., Peterson, Fennema & Carpenter, 1989), has demonstrated that enacting a curriculum that promotes conceptual understanding through active learning demands extensive subject matter knowledge as well as awareness of students' perceptions of concepts in the subject and their ways of learning. Since these knowledge bases play such

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an instrumental role in how teachers perceive, plan and implement instruction, research has also addressed questions related to developing various knowledge bases in teachers.

## Teacher Change in Knowledge and Beliefs

A number of programs for prospective teachers have addressed the need to develop subject matter knowledge and subject-specific pedagogical knowledge that will support teaching for meaningful, active learning (Ball, 1990; Bird, Anderson, Sullivan & Swindler, 1993). While these studies have reported some significant changes in preservice teachers' knowledge and beliefs of subject matter, they have also indicated that it is overly optimistic to believe that preservice teacher education alone will result in the knowledge and beliefs actually required to teach in a nontraditional way (Ball, 1990). Additionally, since the average teacher in our public schools has more than ten years of experience, understanding the inservice teachers' ways of changing toward more conceptually-oriented teaching is needed.

Wilson and Wineburg's (1993) analysis of two history teachers' responses on performance-assessment measures of teacher knowledge highlights the importance of the issue of teacher change for inservice teachers. One teacher in the study, Mr. Barnes, received a BA in speech in the 1950s, an MA in history in 1961; and he had 27 years of teaching experience at the time he completed the assessments. The other teacher, Ms. Kelsey, received a BA in history in 1983, an MA in education in 1985; and she had 3 years of teaching experience. The assessment exercises included evaluation of student papers, use of documentary materials, and textbook analysis. Although Ms. Kelsey had

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considerably less teaching experience, the authors found her responses more in line with their conceptions of "good" history teaching than Mr. Barnes' (while at the same time noting that a response to an exercise is not teaching itself).

In explaining the differences that were found in the pedagogical reasoning of these two teachers, Wilson and Wineburg suggest that the differences "represent major shifts in how we, as individuals and as members of academic communities, conceptualize teaching, learning, and the discipline of history" (p. 755). Wilson and Wineburg state that given the differences in their preparation, "it would have been remarkable for someone like Mr. Barnes, trained when he was, to emerge with the kinds of knowledge and the *view* of that knowledge that Ms. Kelsey displayed" (p. 756). Ms. Kelsey entered teaching with a very different knowledge base from the one Mr. Barnes had when he began teaching. Mr. Barnes' knowledge base at the time of the assessment project did not reflect the types of changes that had transpired in the education and social science fields during his career. Given the importance of teachers' subject matter knowledge and subject-specific pedagogical knowledge to their curricular decision-making, it seems imperative that we learn more about how experienced teachers undergo change. Talbert and McLaughlin (1993) raise important questions in this regard:

> What factors in the environment of classroom teaching influence how a teacher defines the goals and means of teaching and learning and how well she or he realizes the new vision of educational practice? ... What conditions in the multiple context of teaching ... make it more or less likely that a teacher will embrace a vision of "teaching for understanding," will venture the long and risky process of relearning to teach this vision, and will persist in the endeavor? Answers to these questions are crucial if we are to foster and design teaching contexts that enable, rather than constrain, the new vision of teaching and learning. (pp. 167-8)

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Some of the work done with experienced teachers indicates that, indeed, significant changes in teachers' knowledge, beliefs, and practice can occur (e.g., Ball, 1993; Wood, Cobb & Yackel, 1991; Hunsaker & Johnston, 1992; Wilson, Miller & Yerkes, 1993). Wood and colleagues documented the change in beliefs and practice of a 15-year veteran teacher as she participated in a staff development-based research project to improve her approach to teaching mathematics to second graders. Through the course of the study this teacher moved from a traditional, computationally-oriented approach to a more conceptual, problem-solving orientation. Her students became active collaborators in constructing mathematical knowledge. This teacher, having taught second graders for many years, was genuinely impressed with the level of mathematical thinking of her students. Interestingly, the changes in her mathematics instruction were not at all evident in her reading instruction which remained a basal-based, skills-oriented approach.

Hunsaker and Johnston (1992) report on the changes in practice and beliefs of a first grade teacher who had been teaching for 13 years before she enrolled in an experimental master's program conducted with a cohort group of elementary teachers for a two-year period. This teacher's literacy program changed from ability-grouped, basal-guided reading instruction and individual seatwork with desks in rows, to literature-based reading instruction including buddy-silent reading and writer's workshop with desks in groups. The teacher in this study notes

> When I entered the master's program, I was looking for "the right way" to do things; I found something quite different. I think I was ready to make some changes, but the changes have been more dramatic and very different in character than I ever would have predicted. (p. 358)

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While the positive results of these studies and others are encouraging, it is important to note that the teachers who were studied elected to participate in staff development-based research projects, graduate work, or were faculty in a Professional Development School, all of which are intended to bring about change. Additionally, there is research indicating that even when teachers express an interest in changing their practice in a specific direction, such change may not take place. Putnam, Heaton, Prawat and Remillard (1992) found that teachers intending to change their practice to incorporate the national standards in mathematics experienced great difficulty in doing so. Indeed, some of the issues raised by these authors in a series of case studies (Elementary School Journal, 1992, (2)) address the problematic role of the teacher as curriculum mediator when there is insufficient mathematical subject matter knowledge, and/or the holding of beliefs about teaching and learning that are contrary to those reflected in the mathematics standards.

What is needed is a better understanding of what makes teachers want to change and how that change can productively take place when there are no direct interventions such as coursework, staff development-based research projects, and so forth, to support the change, which is the situation for most of our inservice teachers across the nation.

## Social Studies Instruction

While the teaching of reading, writing, mathematics, and even science has been researched fairly extensively, the research on social studies instruction actually conducted in classrooms remains relatively sparse (Cuban, 1991). Reviews of descriptions of teaching that are available, however, do not suggest

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images of teaching for conceptual understanding. Armento (1986) concluded that methods and materials have remained constant over many years:

> Social studies classrooms of today are little different from those 20 years ago, despite the expenditure of millions of dollars and the involvement of many creative minds in the development of innovative curricular materials... Lecture and discussion are still the most frequently used strategies in social studies classrooms with teacher talk dominating; and the conventional textbook remains the primary instructional tool. (p. 944)

Five years later, Cuban (1991) reported that "social studies instruction has been (and is) marked by more stability than change" (p. 197).

In his review of textbook and workbook materials used in elementary social studies instruction, Brophy (1990) found

> worksheets that emphasize recall of memorized facts or practice of isolated skills rather than integration and application of knowledge; suggested questions that are likely to focus classroom discourse on factual recitation but not on critical thinking about the content; suggested activities that use content to provide occasions for practice of skills rather than providing opportunities for students to use the skills to apply the content; and evaluation components that provide only minimal attention to higher order applications. (p. 395)

Similar concerns have been raised with regard to the materials that are available and used at the secondary level (Tyson-Bernstein, 1988). Yet,

> at least 60 percent of high-school class time in social studies is spent using textbooks. Covering the material - just plain getting through a long, tedious list of topics - is the major driving force for harassed social studies' teachers, especially in high schools. (Jenness, 1990, p. 21).

Parker (1991) has traced a long history of scholars criticizing the memorization of facts with little attention to critical thinking (e.g., the Commission of Seven of the American Historical Association, 1900; the National Council for the Social Studies, 1942; Taba, 1967, and Newmann, 1992). At the same time, other critics of social studies instruction point to

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students' scores on assessment measures of historical information and suggest that students' factual knowledge is seriously lacking as well (e.g., Cheney, 1987; Hirsch, 1988; Ravitch & Finn, 1987). Add to these issues, Wilson and Wineburg's (1993) recognition of the major shifts that have taken place in the social science fields as well as social studies education in recent years, and the need to study teacher change in social studies teaching is apparent.

## A Study of Teacher Change

To research the topic of teacher change in social studies instruction, a case study approach was selected.[1] This choice was made to allow for a rich description of a teacher based on interview and observational data which would include information on the various factors that influenced teacher change over a career as well as the different knowledge bases reflected in instructional practice. As Hawthorne (1992) points out in the introduction to her own study of teachers' curriculum development:

> Most of the research relevant to teacher curricular choice examines one isolated source or influence on classroom curriculum, such as teacher knowledge, organizational policy, or student ability. ... By focusing on one source of influence, much of the research literature loses sight of the image of teachers as active agents who construct classroom curriculum in response to client, organizational, professional, and personal obligations converging in the classroom setting. ... Only through the individuals involved can we gain insight into the influence on curricular decision making of various factors and their competitors. ... Acknowledgment of multiple sources of influence and of teacher choice as a personal, interpretive process points to the inherent complexity of any such inquiry. ... A complex web of influence entangles classroom teachers' curricular choices. The point of disentanglement must be classroom teachers themselves. (Hawthorne, 1992, pp. 5-6)

The teacher selected for this case study, Karen, was known by the researcher for several years before the study. Karen was asked to be the case study subject for several reasons. First, she had a lengthy career in middle school

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social studies teaching. Secondly, Karen had revealed in conversation that while she had experienced doubt about continuing in teaching at different points in her career, she was currently quite committed to staying in the profession as long as she could. Karen also revealed intentions behind her teaching that reflected a view of teaching that would have been quite different from what she was exposed to in her initial teacher preparation. For example, a paper written by Karen and a colleague, entitled *Cognitive Coaching*, was distributed to other teachers in her school building about five years before the study began. The paper provided the reader with a thorough review of the research in thinking skills, metacognition and instructional scaffolding from the 1980's. These comments and actions of Karen's suggested the possibility of some type of change having occurred in Karen's views toward teaching during her career. Finally, while Karen participated in the school district's normal staff development workshops, she had never been part of any special program intended to bring about teacher change. She had no mater's degree, and, other than an occasional student teacher in her classroom in recent years, had had no systematic contact with faculty from the local universities before this study. All of the above suggested that Karen would make an interesting subject from whom to learn about teacher change and development.

Three broad questions guided the data collection and analyses in this study:

(1) What has developed over the course of Karen's career, specifically, how has Karen's knowledge about social studies, teaching and learning changed?
(2) What appears to have influenced or brought about changes in Karen's knowledge bases, specifically, what factors seemed most critical to Karen's professional development?
(3) How is Karen's instruction influenced by her knowledge bases, specifically, how has her teaching of history been affected by

changes in her thinking about subject matter, teaching and learning?

The design of this study, as well as data analyses and interpretation, were influenced by a thorough review of the literature in three areas: the nature of conceptual understanding in social studies, the role of teacher knowledge in social studies instruction, and, the broad literature base in teacher change and development. Each of these areas is reviewed in the next chapter.

## Notes

[1] All teachers, students, and schools in this case study are identified by pseudonyms to provide confidentiality to the participants.

# CHAPTER 2

# LITERATURE REVIEW

> The current reforms challenge the educational system at many points, and teacher education is one such critical point. ... Even when professional development - and here we refer to the ongoing education of practicing teachers - is mentioned, it is rarely seen as a linchpin. Yet both preservice teacher education and professional development are central to any change effort in schooling, and there is a growing awareness of this point on the part of policy makers, administrators, parents, and teachers alike. (Wilson & Ball, 1996, p. 134)

As mentioned in the introduction to this study, reports on social studies education suggest little change has taken place in the approach to teaching the subject since it entered the school curriculum:

> A plausible inference to be drawn from the available evidence on the teaching practices of secondary school social studies teachers is that a few key patterns continued to dominate teaching in the closing decades of the 20th century as they did earlier in the century. (Cuban, 1991, p. 203)

At both secondary and elementary levels research indicates that social studies is taught in fairly traditional ways: heavy reliance on textbooks and worksheets, extensive teacher talk, and an emphasis on lower-level objectives and rote memorization of factual information (Brophy, 1990; Cuban, 1991; Goodlad, 1984; Jenness, 1990; Ravitch & Finn, 1987; Thornton & Wenger, 1990). There is evidence that elementary teachers make use of additional materials and some

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group work in their teaching of social studies (Stodolsky, 1988; Thornton, 1992). However, the percentage of teachers employing this instructional variety appears to be small, and the focus on student acquisition of factual information remains.

As in other subject areas, there is currently a reform movement in the field of social studies to change the dominant instructional approach. The professional organization in social studies (National Council for the Social Studies) has recently proposed a new set of standards to guide the social studies curriculum, and a vision of "powerful social studies teaching and learning" in the form of a position statement (NCSS, 1993, 1994). It is with such a reformed vision of social studies teaching in mind that Wilson and Wineburg (1993) assessed teacher knowledge in subject matter and pedagogy, and judged more favorably the knowledge base of a recently prepared teacher over a teacher with many years of classroom experience. Their findings helped to prompt this dissertation study of learning to teach social studies across a career. Informing the development of the study and the analysis of data was the literature on the reforms in social studies, the role of teacher knowledge in teaching social studies, and, teacher development.

## Teaching for Conceptual Understanding in Social Studies[1]

The vision of social understanding and civic efficacy described by the National Council for Social Studies in its position statement is in stark contrast to the dominant emphasis on recalling names, dates, and events which characterizes the approach to social studies knowledge in most textbooks:

> Powerful social studies teaching helps students develop social understanding and civic efficacy. Social understanding is integrated knowledge of social aspects of the human condition: how they have

> evolved over time, the variations that occur in various physical environments and cultural settings, and the emerging trends that appear likely to shape the future. Civic efficacy - the readiness and willingness to assume citizenship responsibilities - is rooted in social studies knowledge and skills, along with related values and dispositions. (NCSS, 1993, p. 213)

As the NCSS position statement continues, the influence of a cognitive-mediation view of learning is evident:

> By itself, the idea of cultural literacy construed in a narrow, name recognition sense is not considered an adequate basis for content selection. Instead, content is included because it promotes progress toward major social understanding and civic efficacy goals, and it is taught accordingly. That is, instructional methods and activities are planned to encourage students to connect what they are learning to their prior knowledge and experience, to think critically and creatively about it, and to use it in authentic application situations. Learning activities are introduced so as to make them minds-on activities that engage students with important ideas, not just hands-on activities that may or may not have educational value. (NCSS, 1993, p. 215)

In an effort to explicate the nature of such instruction, the statement describes powerful social studies learning and teaching as integrative, meaningful, value-based, active, and challenging. Succinctly, this involves the study of connected networks of knowledge with depth of development of important ideas across disciplines. This instruction connects the past with the present and the future, addresses controversial issues, and encourages students to respect well-supported positions. Students develop new understandings through a process of construction facilitated by interactive discourse around authentic activities.

Brophy (1990) developed a somewhat similar picture by interviewing experts in social studies instruction. From his data, he suggested the following five guidelines for effective social studies instruction:

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(c) emphasize the relationships between ideas
(d) have students process information and construct meaning and
(e) embed higher order thinking skills (p. 409)

Even though Ravitch and Finn (1987) have focused much of their criticism of traditional social studies instruction on students' lack of factual information, their description of good history teaching reflects the ideas of Brophy and the NCSS, highlighting the need to examine topics in depth:

> "History teachers should teach history in context so that people and events are seen in relation to consequential social and economic trends and political developments. A richly drawn portrait of a given time and place must also include a sense of the life of the times: the ideas that influenced people's behavior; their religious, philosophical, and political traditions; their literature, art, and architecture; the state of their knowledge and technology; their myths and folk tales; their laws and government" (Ravitch & Finn, 1987, p. 205).

Similarly, a description by Spoehr and Spoehr (1994) of learning to think historically also emphasizes the importance of context and depth:

> History is about facts much in the same way that reading is about the alphabet: Facts (and letters) are essential building blocks; without them you cannot do history (or read). But, just as reading necessitates looking at how the letters and words stand in relation to one another (so that you can see the difference between a horse chestnut and a chestnut horse), thinking historically requires going beyond chronology or chronicle and looking at the relations that the facts bear to one another. (p. 71)

Newmann's work (19990a, 1990b, 1992) provides some of the few examples of how this type of thoughtfulness might occur in actual social studies teaching. Based on classroom observations, he compiled a list of factors that indicated thoughtful social studies instruction, identifying six factors as minimal requirements of a thoughtful lesson:

(1) Sustained examination of a few topics rather than superficial coverage of many.
(2) Lesson displayed substantive coherence and continuity.
(3) Students were given an appropriate amount of time to think, that is, to prepare responses to questions.
(4) Teacher asked challenging questions and/or structured challenging

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(5) Teacher was a model of thoughtfulness.
(6) Students offered explanations and reasons for their conclusions.

Newmann's factors indicating thoughtfulness resonate with many of the other descriptions of social studies teaching described above.

There is far less agreement, however, on the topics to be addressed in social studies (Marker & Mehlinger, 1992). The NCSS has published a set of K-12 standards using ten thematic strands that encompass all the social science disciplines. The Center for the Study of History Education at the University of California at Los Angeles (1996) has published standards in both US History and World History which are organized around time periods. Meanwhile, geography standards around five central themes have been developed, and economic and government standards are being planned. For the social studies teacher, such multiplicity of standards may in fact confuse as opposed to clarify. Additionally, the US History standards were a source of political controversy for their emphasis on inclusion of women and people of color, and their presentation of multiple viewpoints of events. Stodolsky and Grossman (1995) surveyed English, social studies, science, mathematics, and foreign language high school teachers about the features of their disciplines and discovered

> in keeping with a long history of disagreement about what social studies is, social studies teachers score lower on agreement about what should be taught than teachers of all other groups. (p. 243)

The arguments about the appropriate selection and sequencing of content (e.g., whose stories to tell in history, when to teach world geography), and the relative emphasis on factual knowledge will probably continue, but there seems to be a convergence around the importance of teaching for understanding in

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social studies. A synthesis across the recommendations of the authors mentioned above, as well as others (e.g., Leinhardt, 1993; Parker, Mueller & Wendling, 1989; Wilson, 1991; Wineburg & Wilson, 1988), generates two themes in the new approach to social studies teaching which are similar to current recommendations in other subject areas such as mathematics and science. First, the content of social studies should be focused on significant topics that are addressed in depth, emphasizing the relationships between concepts, and their relevance to students' lives. That is, instruction should be directed at developing rich conceptual frameworks of knowledge. Secondly, students need to be active learners, processing the content of social studies in meaningful ways, and developing thinking skills which allow them to become more effective self-directed learners who can apply information to new situations.

Many researchers have suggested that this type of teaching, whether in social studies or in other subject areas, places heavy demands on teachers in terms of their professional knowledge.

## The Role of Teacher Knowledge and Beliefs in Social Studies

As Wilson and Sykes (1992) point out in their reference to the descriptions of effective history teaching proposed in the Bradley Commission's Historical Literacy:

> The image of the teacher emerging from these chapters is one who deeply understands the subject matter to be taught, who wants to communicate that understanding to students, and who also understands that this is possible only through a variety of pedagogical strategies that are appropriate for the particular content and students at hand. Such teaching requires, in turn, elaborate understanding of schools and schooling, students and subject matter. ... It is not sufficient to proclaim what should be taught in history classes and how. It is also crucial to consider the many sorts of understanding and skill that teachers need in

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Shulman (1987) helps elucidate the understandings and skills required of teachers through his discussion of pedagogical reasoning and the knowledge bases teachers use during this reasoning process. According to Shulman, pedagogical reasoning is composed of a set of distinct processes. Comprehension involves the understanding of a set of ideas to be taught and how they serve educational objectives. Transformation is the act of changing the understood subject matter so that it can be represented to specific students. Evaluation occurs when teachers check for student understanding during and after instruction, and reflection follows when the teacher compares the results of her instruction to her intentions. The process of pedagogical reasoning may conclude with a teacher achieving a new understanding of the subject, the students, or the instructional strategies used.

Adapting Shulman's work, Grossman (1990) proposed four general categories of teacher knowledge which influence a teacher's pedagogical reasoning and action: general pedagogical knowledge, subject matter knowledge, pedagogical content knowledge and knowledge of context. General pedagogical knowledge involves knowledge of learning and learners, general principles of instruction and management, and beliefs about the purposes of schooling. Subject matter knowledge includes one's understanding of content as well as the organization of the field and the modes of inquiry. Pedagogical content knowledge is specific to a subject, and focuses on one's beliefs about the subject matter, knowledge about students' understandings in the subject, curricular knowledge, and understanding of instructional strategies and representations for particular topics. Knowledge of context is situation-

specific, and relates to a particular teacher's district and students.

While research on teacher knowledge is relatively new, the work has been substantial, particularly with regard to teacher subject matter knowledge (Grossman, Wilson, & Shulman, 1989). In several content areas, specifically, science, math, and English, as well as social studies, differences in teachers' discipline knowledge have been shown to have a significant effect on how teachers plan, organize, and represent content to their students (Carter, 1990). More significantly, Ball and Mosenthal (1990) believe that recent research "suggests that teaching in new ways, in ways focused on understanding, is highly dependent on the teacher's own understanding and conception of the subject matter" (p.2).

Wilson and Wineburg (1988) studied four novice history teachers with different areas of academic preparation (i.e., anthropology, political science, history), and found that these differences in preparation were related to different conceptions about the nature of history knowledge and how to teach it. The teacher who had majored in anthropology taught history with a strong emphasis on culture while the teacher who majored in political science treated history as a collection of facts about the past. Both of the teachers trained in history presented lessons that focused on the important role of interpretation in historical explanation. The different preparations of the teachers also appeared to affect what parts of the textbook were used and how much they relied on it. Other studies (Evans, 1988, 1990; Gudmundsdottir, 1992; Thornton, 1988) have also indicated that social studies teachers' conceptions about subject matter influence what they plan to teach and what they actually provide in the classroom.

In related studies, Wineburg and Wilson (1988) and Wilson (1991), explored the characteristics of expert subject matter through the stories of two experienced teachers and a novice teacher. They concluded that social studies teachers need to have deep knowledge in one of the social science areas and an understanding of the nature of each of the disciplines in social studies. Wilson and Sykes (1992) provide a description of what deep knowledge means:

> Teachers whose responsibility is to teach American history should have studied American history in depth. But usable knowledge of American history is not easily measured. It is not simply a matter of quantity - the ability to recite more dates, recognize more name, recall more events. Rather, it requires elaborated, coherent understanding of historical phenomena. (p. 271)

They suggest that useable subject matter understanding is differentiated (e.g., recognition of multiple explanations for a specific event in history), elaborated (e.g., awareness of interesting details surrounding a particular topic), qualified (e.g., understanding that historical knowledge is tentative), and integrated (e.g., knowing how events are interrelated). These researchers also recognize the importance of subject-specific pedagogical knowledge, suggesting that social studies teachers should know how to transform the subject matter and know how to evaluate curricular materials critically. The direct relationship between these knowledge bases and the pedagogical reasoning processes of comprehension and transformation is apparent.

While some might suggest that the use of general pedagogical knowledge by teachers has been studied extensively, for example, Grossman (1990) suggests that it "has been the focus of most research on teaching" (p.6), the research has frequently been limited to narrow and highly prescriptive teacher behaviors (i.e., use of wait time, analysis of levels of questions asked), while on other

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occasions, its role as a knowledge base may be masked within the research on pedagogical content knowledge. Within studies of social studies instruction, Thornton (1992) found that social studies teachers made different choices in their curriculum planning and instruction based on their conceptions about the nature of knowledge and how students learn (e.g., technical versus constructivist views), as well as their beliefs about student ability. Wineburg & Wilson (1993) have also indicated that teachers' responses to hypothetical curriculum planning questions reflect different beliefs about student learning and ability. Overall, however, it appears that teachers' general pedagogical knowledge and how it may combine with subject matter understanding to create pedagogical content knowledge is not well-studied.

An understanding of how teachers, in particular, practicing teachers, will develop and use new knowledge bases will be crucial to any efforts at reform in social studies teaching.

## Teacher Development

One could divide the research on practicing teachers' development into two different views of teaching: one, bureaucratic, the other professional (Darling-Hammond, 1986). The former view is probably best represented by studies of curricular innovations. The national movement in the 1960's to dramatically reform the school curriculum viewed the teacher as the technician who would implement the curricula developed by experts, a model that by-passes the teacher in the curriculum development process. Attempts during this period to effect change in social studies instruction (i.e., the New Social Studies) and in other areas failed. Most teachers did not adopt the instructional materials or used them in ways not intended by the developers (Berman & McLaughlin,

1978). As was true in other subject areas, "many researchers drew the lesson from the New Social Studies movement that teachers were at the heart of curricular instructional change" (Thornton, 1992, p. 86).

Even with the recognition of the role of teachers as important mediators in the curriculum development process, the bureaucratic view is still prevalent in current approaches to staff development. Guskey (1985) proposed that attempts to change teacher knowledge and beliefs should first focus on change in teacher behavior, surmising that only seeing the results of a change in behavior will lead a teacher to make cognitive and attitudinal changes. Other staff development approaches from this paradigm have focused on providing the best conditions for teachers to engage in successful ongoing implementation of innovative programs. These conditions include attention to both how to help teachers acquire the knowledge and skill requirements and how to affect teachers' valuing of and commitment to the program (e.g., Joyce & Showers, 1980; Porter, 1986; Stein & Wang, 1988). In essence, the key to success became a more effective delivery system.

The typical approach to teacher development remains the staff development workshop in which teachers receive "a transferable package of knowledge to be distributed to teachers in bite-sized pieces" (Lieberman, 1995). The type of teacher knowledge and understanding alluded to in the previous section does not lend itself to packaging in this manner. Teaching for conceptual understanding and active learning is not amenable to such a prescriptive notion of pedagogical knowledge. The teaching behaviors associated with the new visions of teaching cannot be easily delineated and consumed in a staff development workshop, then implemented as if they were nothing more than

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'increased wait time'. As Wilson, Miller, and Yerkes (1993) indicate in describing efforts at teaching social studies for understanding, "There exist no easy answers, no recipes for action that guarantee results" (p.86).

Such a vision of teaching relies on a different view of teacher development:

> The alternate view [The professional view] depicts teachers as skilled professional who engage in thoughtful analysis about the needs of children, taking into account issues of subject matter, pedagogy, and child development. In making decisions, teachers draw on a rich knowledge base similar to the knowledge bases of professionals in other fields. (Wilson & Wineburg, 1993, p. 731)

With this professional view of teaching comes the recognition that teachers have a role to play in their own development. In the introduction to Rebecca Hawthorne's book, *Teachers as Curriculum Decision Makers*, Cuban (1992) asserts that "for curricular innovation to take place the teacher is the person who must be changed and the teacher must also be the agent of change" (p. ix).

One group of studies on teacher development that reflect this view of teacher as the agent of change are the stories of teacher development written by practicing teachers themselves. Herbert Kohl (1984) shares his sense of constraint by the rigid time schedule in his elementary classroom, and his belief that the curriculum did not connect with his students' inner-city lives. He transformed his room into a place of dialogue, both spoken and written, and let his children's life experiences influence the direction of the curriculum. Sylvia Ashton-Warner (1963) felt that the official workbooks at her school were destructive to her young Maori children so she developed materials based on their experiences that they could relate to and understand. Eliot Wigginton (1985) felt like a failure in reaching his high school students in rural Georgia. He gradually developed his "Foxfire" approach which put his students in the

role of inquirers, researchers and reporters of the rich traditions and histories around them. Each of these teachers' stories, and other teachers' stories as well (e.g., Atwell, 1987; Calkins, 1990; Paley, 1979), reveal cases of teacher development spurred by experiences of real conflict and self-doubt. Each teacher reached out to his or her students and within himself or herself to find direction. While these stories are certainly informative, they represent the lives of fairly remarkable teachers, that is, teachers whose writing about their work in the classroom has garnered them national attention. To what degree their stories of development are alike and different from the careers of more typical practicing teachers is worth investigating.

Studies of the professional life cycles of typical teachers (Adams, 1982; Ball & Goodson, 1989; Fuller & Brown, 1975; Huberman, 1989, 1992, 1993) do show some of the same patterns of disillusionment or dissatisfaction leading to teacher change. In a study of the career paths of over 150 middle school and high school teachers in France, Huberman (1993 [1989]), based on five to six-hour interviews with each teacher, identified various phases of teachers' careers, for example, stabilization, self-doubt, experimentation, renewal, disenchantment, and positive resolution. According to Huberman, 42% of the teachers in his sample experienced sufficient self-doubt to consider leaving the profession (i.e., teachers with less than 5 years of experience and teachers who resigned from the schools under study were not part of Huberman's sample, so the total percentage of teachers who considered leaving would have been even higher). In addition, 83% indicated that they had colleagues who experienced serious doubts about teaching. Interestingly, teachers who experienced serious doubts were significantly more likely to end their careers in disenchantment.

While Huberman did explicate some of the factors that were mentioned by teachers for changing their practice in different phases of their career, his data analysis did not lend itself to rich descriptions of individual teacher's development. We know very little about what factors would steer an experienced teacher toward successful experimentation and renewal rather than disenchantment.

More recent studies of teacher change have focused on case study approaches that provide the rich detail not possible in Huberman's large studies. Some of these studies have involved teachers as collaborative researchers (e.g., Campbell, 1988; Hunsaker & Johnston, 1991), while others have involved researchers as collaborative teachers (e.g., Louden, 1991; Wilson, Miller & Yerkes, 1993).

Wilson, Miller and Yerkes' (1993) documentation of their collaborative efforts to plan and implement an integrated curriculum in two third-grade classrooms provides a window into the realities of individual teacher change. The trio explains that even though they work in a professional development school which has intellectual, financial and organizational supports for teachers, "we have found the process of changing our practice to be difficult and slow. It is our collective experience that changing one's teaching practice, no matter what the conditions, is difficult work" (p. 86). However, the collaboration with colleagues had a powerful impact. Excerpts from a memo by Miller reflect this change:

> When ITIP [Instructional Theory Into Practice] was offered to teachers within the district, I took the class, embracing Madeline Hunter's approach to teaching children. ... I filled my teaching with all that I learned to help students.
>
> ... [However] I had no one to communicate with about what was

> happening in my classroom. Yes, I could tell another teacher about certain aspects of my teaching, but it was never a serious discussion. It was superficial and usually consisted of passing comments.
>
> When I became involved in the professional development school efforts, I went through that process much like I went into ITIP. It was just part of my desire to see what someone else had to offer about student learning. Now 3 years later, I'm beginning to see a bigger idea. This process that I've been involved with over the past three years is not only about student learning - but about teacher learning. Not teachers being informed and told to try a certain idea, but teachers developing many exciting and stimulating avenues for learning. (p.89)

As mentioned in the introduction, the studies reviewed above reported on the development of teachers involved directly in change efforts. While studies that investigate the effects of teachers and researchers working together are certainly important, this represents a small minority of practicing teachers. The goals of educational reform described in the beginning of this chapter would also be well served by a better understanding of how change takes place for individual teachers over the course of a career without this type of interaction.

## Notes

[1] Descriptions of meaningful social studies understanding and recommendations for change in social studies instruction generally fall into two categories: general social studies and history. Since this study involves a social studies teacher currently teaching history, I use information from both categories interchangeably.

[2] I will use the phrase teacher knowledge to connote teacher beliefs as well. Certainly, there is a distinction to be made between the terms, as described by Richardson (in press):

> "In the traditional literature, knowledge depends upon a "truth condition" that suggests that a proposition is agreed upon as being true by a community of people. Propositional knowledge has epistemic standing; that is, there is some evidence to back up the claim. Beliefs, on the other hand, do not require a truth condition"
> (p. 5 of chapter draft).

However, in terms of exploring the influences on teachers' pedagogical reasoning, I will use the term knowledge as Alexander, Schallert and Hare

(1991) have proposed:

> "*knowledge* encompasses all that a person knows or believes to be true, whether or not it is verified as true in some sort of objective or external way" (p. 317).

Therefore, a teacher's subject matter knowledge would include the teacher's substantive knowledge of a particular discipline's structure and modes of inquiry, as well as the teacher's conceptions or beliefs about that discipline.

# CHAPTER 3

# METHODOLOGY

> To say that teachers are the ones who understand, know, and can say seems so obvious that it is beneath reporting. But in the often odd, sometimes upside-down world of social research, the obvious news must be reported and repeated: The secret of teaching is to be found in the local detail and the everyday life of teachers; teachers can be the richest and most useful source of knowledge about teaching; those who hope to understand teaching must turn at some point to teachers themselves. (Ayers in Schubert & Ayers, 1992, p. v)

The intent of this study was to explore what one veteran teacher understands, knows, and can say about teaching across her career. The study was also intended to capture the everyday life of teaching social studies. A case study design was selected to provide the rich detail desired.

## Study Design

Karen was selected for this study as an instance drawn from the class of teachers who, with no extraordinary support for development, continue to show evidence of teacher development and change toward the end of a lengthy teaching career (Merriam, 1988). In previous interactions with Karen I had found her to be highly reflective about her teaching, willing to share her ideas, and committed to her work; all characteristics which make her a good candidate for a case study of teacher thinking (Elbaz, 1983). Because the intent of the

investigation was to discover Karen's perspective of the knowledge and beliefs that guide her teaching, as well as the factors that have influenced her development over time, naturalistic methods including field work in the classroom and intensive interactions with the teacher were selected (Lincoln & Guba, 1985).

## The Teacher under Study

Karen received a BA in pre-law in 1964. She has taken courses now and then over the years but has never pursued a graduate degree. At the time of the study Karen was in her 29th year of full-time teaching, and in her 28th year teaching 8th grade US History in the same school. I developed a relationship with Karen during the two and a half years before the study began. Karen had agreed to supervise students from my social studies methods course who observed her teaching several hours a week during the fall semesters. I was also the university supervisor for a student teacher who was in Karen's room during the spring. By the time I approached Karen about the possibility of being the subject of my dissertation, we had a professional and personal relationship.

During the year of the study Karen was the team leader for her interdisciplinary team of four eighth grade teachers, all of whom shared essentially the same students. Included on the team was a math teacher, a science teacher, and an English teacher. Also during the year of the study Karen was serving on an advisor/advisee committee which was looking into how to implement an advising program at the school. Finally, Karen was also part of a committee looking at how to promote protect/respect, a program directed at non-violent conflict resolution and respectful behavior.

## The Setting of the Study

### The Site

Thomas Jefferson Middle School is located in a city of approximately 70,000 within a metropolitan area of about 150,000 in an otherwise primarily agricultural area in the Upper Midwest. The school, which serves 7th, 8th, and 9th graders, has had an enrollment of approximately 950 students for the past several years. The school has two floors of classrooms and gymnasiums above ground level, and a basement level where the cafeteria, teachers' lounge, and teachers' workroom are located.

There are seventy-six classroom teachers in the building, including fourteen working special education and support services. Seven teachers are teaching social studies, and three are teaching at least one section of 8th grade US History, for a total of twelve sections of this class. During the year of the study, there was a new principal at Jefferson who had worked her way up through the ranks within the district. The previous principal who had been at the school for many years had become the principal of a new middle school on the south side of town, in the rapidly-growing, and more affluent, residential area.

The student population of the school is primarily white. There are small numbers of Native American and Hispanic students, very small numbers of African-American students, but a growing refugee population, mostly from Asia and Eastern Europe. The school draws students from several elementary schools in middle class and lower-middle class neighborhoods. Approximately 20% of the students in the school receive free or reduced lunch. The school has a non-tracking policy, and, according to the district policy guidelines, is

committed to "full utilization" of the least restrictive environment. About 11% of the student population has Individualized Education Pans.

**The Two Class Periods**

Karen was teaching the same preparation, 8th grade US History, five times a day. I elected to observe her teach during two periods because I felt this would give me the best sense of Karen's "common" curriculum as well as ideas about her interactive decision-making which I could explore during interviews. Karen suggested two periods which differed rather significantly in terms of the students in those classes.

It seems that because of the scheduling of other classes, the make-up of the students in Karen's fourth and fifth periods represented two fairly distinct groups. While it is true that Thomas Jefferson has embraced a non-tracking philosophy for the school, there is still a type of tracking that takes place when students elect to take orchestra and/or advanced math classes. The more highly motivated students tended to be in orchestra and advanced mathematics classes. Because these classes were scheduled only once per day, the students in advanced math and/or orchestra were not available during those times for other classes. There was a significant number of these students placed in Karen's fourth period class, a class of twenty-eight students, and only a few in her fifth period class, a class of twenty-one.

## Types of Data

**Observational Data**

I observed a full unit of Karen's second semester course in US History in both fourth and fifth period to document her day-to-day approach to teaching social studies. I was in Karen's classroom for twenty days over a five-week

period. I returned for two lessons later in the semester, one in each of the next two units, and I also observed the review days for the final exam as well as the final exam.

**Interview Data**

There were three types of interviews in the study: course interviews, unit interviews, and professional experience interviews. Two course interviews were conducted, one at the beginning of the study and one at the end, to understand some of the factors that influenced Karen's yearly and unit planning decisions for each of her semester courses in US History. Karen was also interviewed before, during, and after my observations of the 20-day unit on Change to elicit the planning, interactive, and reflective reasoning surrounding her instructional choices. Finally, four professional experience interviews were conducted to develop descriptions of changes in thinking and practice, and the factors that had contributed to those changes, over the course of Karen's career.

**Other Data**

Throughout the study other pieces of data became available for my investigation. For the most part, these were documents that corroborated statements Karen had made in an interview or pinpointed a specific time period for an event. For example, Karen made available to me copies of papers she had written with her colleague, Laurie; she gave me the school's report for an NCA evaluation that occurred in the late 80's; she showed me different supplemental materials she used for planning, and so forth.

## Data Collection and Initial Data Analysis

In this section I discuss my procedures for data collection and initial data analysis which occurred during the time of data collection. I want to present

the procedures employed for initial analysis but distinguish this process from the more formal analyses described under final analysis (Bogdan and Biklen, 1992).

**Observations**

I usually arrived about ten minutes before class and set up my tape recorder during Karen's preparation period. Karen would frequently come into the room and talk with me during this time and I would later indicate the topics of our discussion on the top of my field notes for that day. These notations about before-class conversations would usually be discussed when we met for a "during" unit interview.

During observations I sat in a corner of the room along the back wall at Karen's desk. This was a good location for me to see the entire room while at the same time not being obvious to the students. I was introduced to the students on the day I visited to explain the study and the permission slips. Once I began my observations, I did not interact with the students unless directly asked a question, usually by a student sitting at one of the two tables on either side of Karen's desk. For example, I was sometimes asked if I could loan a student a pencil, if my tape recorder was turned on, if I could hand a student the three-hole puncher, and so forth. In general, the students appeared to take little notice of my presence.

I started the tape recorder right after the bell rang in each class. Throughout the class period I wrote in a field note tablet. During my observation I was guided by recommendations from Taylor and Bogdan (1984):

> Pay attention.
> Shift from a "wide angle" to a "narrow angle" lens - that is, focusing on a specific person, interaction, or activity, while mentally blocking out all

> others.
> Look for key words in people's remarks that will stand out later.
> Concentrate on the first and last remarks in each conversation.
> Mentally play back remarks and scenes during breaks in the talking or observing.
> (p. 54)

The content of my field notes followed the guidelines of Merriam (1988) and I was influenced by these recommendations both during the initial collection of data and the initial analysis:

> Verbal descriptions of the setting, the people, the activities.
> Direct quotations or at least the substance of what people said.
> Observer's comments - put in the margins or in the running narrative and identified by underlining, bracketing, or the initials "OC." Observer's comments can include the researcher's feelings, reactions, hunches, initial representation, and working hypotheses. (p. 98)

Since my focus was on Karen, I attempted to capture verbatim dialogue, her position and movement around the room, and her interactions with students. While my attention was not on individual students unless Karen was interacting with them, I would periodically note the general engagement and behavior of the students around the room. I wrote down the time throughout the class period, approximately every five minutes, but not on a set schedule. While I was taking notes of the classroom events, I would also write comments on my paper that would include ideas about patterns I was seeing in Karen's practice, notes to transcribe a particular section of dialogue, questions I wanted to ask Karen during an interview, and so forth.

As soon after an observation as possible, I would begin informal analysis by listening to the tape and filling in my field notes, for example, inserting the verbatim dialogue, noting how much time passed between specific events, and so forth. As Bogdan and Biklen (1992) recommend, I avoided summarizing and evaluating and instead made my "best effort to objectively record the details of

what occurred in the field" (p. 119). In most cases, revised field notes were typed into the computer. In other cases, revisions to the field notes were made directly on the original sheets, but included the same information as typed field notes (Figure 1). Each observation write-up was labeled by unit, day of the unit, and class period for future reference. The times were indicated in the furthest left column, followed by the counter number on the tape recorder, and the number of the cell for that observation. Filed notes were divided into cells for easier reading. The widest column included the observational information as well as observer comments which were labeled by "OC." Each observation write-up was filed in a folder, one for each day, along with any handouts Karen had distributed to students. Original field notes were always kept and were also placed in the daily folder.

**Interviews**

With the exception of two interviews which were conducted in Karen's classroom (one after school and one during her preparation period), and one additional interview which was conducted in a restaurant, all interviews were done in Karen's home. Since Karen is a smoker and she can't smoke in school, meeting in her own home seemed the most comfortable for her. The two school interviews were approximately forty-five minutes, but all other interviews ranged from ninety minutes to three hours. I went to each interview prepared with some preliminary questions and I would use this paper to write down any ideas or reactions that I felt I should record during the interview.

Each interview was tape-recorded, transcribed in its entirety, and formatted as a table. Each table had three columns on the left side for periodic tape recorder counter numbers, cell numbers, and speaker designation. On the right

Unit VI, Day 4, Period 4, Page 1

| Time | Tape | # | Observation Field notes | Coding |
|---|---|---|---|---|
| 10:43 | | 1 | Most sts are in their desks. Bell rings.<br>T: OK, let's come to order, please.<br>Many sts are opening notebooks to their notes.<br>T asks sts for their News Games.<br>T: Make sure you have the one for this week and not the one for last week; they're the same color.<br>Sts sit quietly with News Games while T organizes papers at the podium. She quickly collects News Games from each table. Sts talk very quietly during this time.<br>T: Make sure your name's at the top. | |
| | 25 | 2 | T: Open your notebooks to your notes which are due today.<br>T picks up clipboard and stands in the front.<br>T: OK, a reminder. I want all of you to look at your notes and be prepared with at least one question you can ask when I'm done checking. Now, your question can focus on something you don't understand or something that you're just curious about. I can't promise I can answer them but I'll try. Some of you still need to show me notes from last week. If you're in that category and have them, show me both.<br>*OC: A good example of her trying to explain to students that questions are more than just instances of not comprehending something. This is a connection to her focus on curiosity.* | |
| 10:46 | | 3 | T begins with sts in Group #1. She initials their notes quickly as sts turn the pages.<br>T to st at #1: I want your history binder here tomorrow. When we get to the end of the semester you'll want all of your history in one place.<br>T moves from one table to the next.<br>T to st at another table: You're supposed to be quietly reading your notes; you're not supposed to be visiting. | |
| | | 4 | T is with Group #5 now. I can see that several of the sts in that group use colored highlighters in their notes. Also, 2 sts at #4 do the same. All are females.<br>*OC: It's interesting to see the differences in the notes that students take. I'm not assuming that colored notes are better, but it does appear that some students take more time with their notes than others. All sts in this class have done their notes.* | |

Figure 1 - Sample Page of Observation Field Notes

side of the table next to the actual interview text, was a column for writing comments (Figure 2). Interviews were labeled as Before, During, or After (depending on when they occurred in the unit), Course, or Professional Experience. Whenever there was more than one interview of a given type, the interviews were identified by number. When more than one tape was used, this was noted by letter. For example, the third "during" unit interview had three tapes. The transcript of the third tape would be identified as During Unit Interview 3C. (See Appendix A for interview protocols.)

Course Interviews

During the first interview Karen was asked about the course outcomes, course topics, the organization of topics, assessment, and some indication as to materials and activities used in the courses. The interview was partially guided by a scope and sequence document I had from a prior year. Karen had decided not to print one for the year of the study, but the information in the old document was very comparable to what Karen was currently doing and provided a good source for discussion. Karen was also asked about changes she had made from the previous year.

During the second course interview Karen was asked to explain what she might do the following year, again touching on outcomes, topics, organization, assessment, and materials and activities. The questions I took to this interview were influenced by my review of the first course interview. At this time I paraphrased some of the conclusions I had drawn from the previous interview and asked Karen to comment on my interpretation. This interview was also influenced by events that had taken place during the study.

Syllabus Interview 2A, Page 1

| Tape | Cell | Sp. | Transcript | Comments |
|---|---|---|---|---|
| | 1 | I: | Before the phone rang I asked you about your comments during the first syllabus interview concerning whether eighth graders should take history. You started to talk about the adolescent's sense of time. | |
| 002 | 2 | T: | Yeah. I don't think they have a... They don't see themselves in time and they have a very poorly developed sense of time. So, I think that to throw at them a subject that involves a great deal of vocabulary development and um... and a sense of time. I mean you look at my tests and consistently the questions they find the hardest are sequence. And it's... I'm convinced that it just has to do with this sense that they live in the here and now. They are very present-oriented and very wrapped up in their own lives. | |
| | 3 | T: | Part of my feeling is also because my intuition tells me the course we ought to be teaching is law and justice. That they are at a point in their life where interesting them in the legal system and we don't teach that in our school system. Yet, I think more and more that's a subject... I would love to be teaching an Introduction to Law. I mean our whole society is based on the role of law and I... Now, I pick up magazines and I'm reading about these militia groups and the people in them and it strikes me that a lot of them don't have a basic conceptual understanding of a) democracy and b) the role of law. | |
| | 4 | I: | Eighth graders as well people in general society? | |
| | 5 | T: | Yeah. And not just the militia but a lot of the groups who are expressing dissatisfaction with our government um... I understand some of what they are saying but I think, you know, they are putting the blame in the wrong place. It just... To some degree, it's ignorance and I think that with eighth graders in particular a lot of them are having personal encounters with the legal system and that it would be... I think that would be much more relevant to them. I think that we could do some really neat things. | |
| 024 | 6 | I: | So what they have... I don't know what they have at Central but at West they have a law class. It's an elective I assume. John Smith taught it. | |
| | 7 | T: | Yes. He's gone and with him went the course. | |

Figure 2 - Sample Page of Interview Transcript

Unit Interviews

In the "before" unit interview Karen was asked what she hoped to accomplish in the unit and what her tentative plans were for materials and activities. During this interview she sketched out in general terms what would happen during the unit, indicating what activities she thought she would use and where she was still unsure of what she would do.

In the three "during" unit interviews Karen reflected on the lessons that had been taught since the last interview. Our interview was guided by the field notes from my observations. Before each interview I reviewed my notes and typed into the computer an outline of the activities that took place during each lesson I had observed (Figure 3). I was careful to note any differences that I

| DAY 1 | DAY 2 | DAY 3 |
|---|---|---|
| Test Corrections - reading<br>New Groups - select names<br>Mini-Lecture about Change<br>Reading about 'James' | Student Notes/ Questions<br>Mini-Lecture on Technology<br>Starting a Textile Mill<br>Bio Sketch of Slater | Channel 1 poll<br>Mini-Lecture on Infrastructure<br>Different Modes of Transportation Activity |

Figure 3 - Outline of Daily Lesson Activities

had observed between fourth and fifth period so that these could be raised for discussion. I began these interviews by sharing my outlines with Karen to see if she felt I missed anything and then we generally discussed each day, focusing on what Karen was thinking at various points in a lesson, why she made certain decisions, and how she felt the lesson went. Whenever students had completed quizzes or had written in their learning journals, Karen would discuss her

interpretation of this information. She also shared her plans for what she would be doing in the upcoming lessons.

In the "after" unit interview I asked Karen to discuss her evaluation of the success of the unit and what changes she might make in teaching the unit in the future. At this time we reviewed Karen's item analysis of the unit test the students had taken. I also conducted brief interviews with Karen at the conclusion of the last two units in her course which followed the unit on change.

Professional Experience Interviews

I began the first interview with Karen's decision to be a teacher and worked backwards and forwards from there to include her memories of social studies, her undergraduate degree and her teacher preparation program. The second interview included Karen's colleague and was conducted about halfway through the study on a day that was convenient for them as there was no school. During this interview we focused on their eight years of working together, but the parent conferences from the evening before provided lots of talk about the present as well. The third interview was completed at the end of the school year, when I focused on filling in the gaps between Karen's teacher preparation and her work with Laurie. The final interview was conducted at the end of the summer and focused on Karen's recent experiences and her thoughts about the future. While I attempted to structure these interviews around chronological periods, it should be noted that the conversation was essentially open-ended and Karen was free to take the discussion wherever she wanted. When the topics appeared to drift too far from information that I felt was pertinent to the study (e.g., discussions of the current political scene), I would direct the conversation

back to a former topic when there was a pause.

After each of these interviews I would sketch out Karen's career, placing events in chronological order. During the next professional experience interview I would check the information with Karen and correct any mistakes. I also frequently paraphrased what I perceived to be the most significant ideas from the last interview to be sure that Karen felt I was interpreting her statements accurately.

## Final Data Analysis

> Data analysis is the process of systematically searching and arranging the interview transcripts, field notes, and other materials that you accumulate to increase your own understanding of them and to enable you to present what you have discovered to others.
> . . . For most, the end products of research are books, papers, presentations, or plans for action. Data analysis moves you from the rambling pages of description to these products. (Bogdan & Biklen, 1992, p. 153)

I worked with different sets of my "rambling pages of description" in a slightly different fashion, guided by my research questions. Basically, professional experience interview data were analyzed to discuss Karen's changes throughout her career while observational data were analyzed as a set to describe Karen's practice. Course interview data and unit interviews were analyzed as a set to explore Karen's reasoning for her practice. However, as categories and themes emerged, information from one set that seemed to provide confirming or disconfirming evidence for another set was included in that analysis. For example, there were times when reflections about Karen's current teaching would come up in a professional experience interview, or, information about Karen's career and prior teaching would surface during a unit interview.

The professional literature on social studies instruction, teacher knowledge, and teacher development informed the choices of coding categories and themes for my analyses; however, in all cases, I attempted to let the data direct these selections. For example, while Huberman's (1989) study of teachers' careers influenced my search for 'phases' from Karen's professional experience interviews, I organized Karen's career into segments based on her descriptions of change in attitude, significant events, and so forth. Only afterwards did I go back to Huberman to look for possible similarities between Karen's experiences and the teachers in his work, which allowed me to explore themes of stabilization and experimentation.

**Observational Data**

I maintained a running outline of each day's activities throughout the time I was observing as these outlines were used in my "during" unit interviews with Karen. To decide on a coding scheme which would allow me to summarize Karen's practice over 22 lessons, I began by reading through my first week of field notes, and trying to identify categories. Using information from my notes, my reading, and Karen's own language in interviews, I continued to revise my categories as I analyzed more observational data. At first I identified a series of instructional events, but found that this did not reveal enough about the characteristics of Karen's teaching. Finally, after major revisions, I arrived at a set of categories that captured what I felt were the critical features of Karen's instruction and made a chart which displayed how frequently these features occurred on each day I observed.

**Course and Unit Interview Data**

I assembled the course and unit interview data in chronological order (Course 1, Before, During 1, During 2, During 3, After, Course 2) and read through each interview once. I wrote comments in the right column indicating what was being discussed (e.g., group work, course scope and sequence, mini-lecture) and the type of understanding reflected in Karen's statements (e.g., beliefs about learning, subject matter knowledge), similar to my first run through the observational data in which I marked what instructional events were occurring. After establishing the categories from the observational data, I placed these characteristics of Karen's practice on a large sheet of paper and read through the interviews again, indicating on the paper the location of any explanation Karen gave for a particular instructional feature. These statements were then pulled together and examined to reflect Karen's thinking accurately.

**Professional Experience Interview Data**

As each professional experience interview was completed, I sketched a visual organizer of Karen's career because I used this graphic in the interviews to ask Karen if the information was correct and to facilitate filling in missing events. When the interviews were completed, I reread each interview to finalize my selection of phases. Once that was accomplished, I read the interviews again to note the location of specific information related to each phase.

## Organization of the Remainder of the Text

The remaining chapters of the text attempt to shed light on the issues raised by the study's questions. Specifically, Chapter 4 is a description of Karen's career and addresses her professional development. It highlights the significant

changes in Karen's knowledge over time and the factors that appear to have influenced those changes. Chapter 5 is a description of Karen's instruction as reflected in the observed unit on Change. Several salient characteristics of Karen's practice are identified and clarified by referring to examples from the observational data of actual lessons. In addition, the reasoning behind Karen's practice is presented from course and unit interview data, linking specific knowledge bases of Karen's with her instructional choices. Chapter 6 describes several differences between Karen's 4th and 5th period classes, again drawing from both observational and interview data. This analysis provides the opportunity to examine Karen's on-going professional development as she wrestles with current dilemmas in her teaching. In Chapter 7, the findings and implications raised by the previous chapters will be discussed.

# CHAPTER 4

# BECOMING A MIDDLE SCHOOL SOCIAL STUDIES TEACHER: A PERSONAL JOURNEY OF PROFESSIONAL DEVELOPMENT

> In teaching, teachers weave together many different kinds of knowledge and belief: of students, of how students learn, of the teacher's role, of pedagogy, and of the subjects they teach. What they do is shaped by considerations of the context and their disposition to do particular things under particular circumstances. Their knowledge, skills and dispositions are, in varying measures, the product of what they experienced as pupils, whatever professional training they have received, and their experiences as teachers. Inservice teacher educators and policy makers bent on helping teachers change and develop their practice must consider how to influence most effectively this complex web of ideas, understandings, and habits in ways that will shape what teachers actually do in their classrooms (Ball & Mosenthal, 1990, p. 1)

The focus of this chapter is a description of the "complex web of ideas, understandings, and habits" that have shaped Karen's practice in social studies, and a discussion of how her knowledge and belief has changed over the course of her career.

## Phases of a Career

In gathering and analyzing the data to tell the story of Karen's career, I was most strongly influenced by the work of Huberman (1989, 1992, 1993) and by the researchers in teacher narrative and teacher lore (e.g., Schubert & Ayers,

1992; Witherell & Noddings, 1991). Most specifically, I was intrigued by Huberman's findings about typical phases in a teaching career, and the teacher lore researchers' emphasis on the role of personal events in one's professional development. I explored both of these in my interviews with Karen. However, asking Karen to break her career into phases and to provide a label for each one that suggests a theme for that time period, a successful strategy in Huberman's study, was not effective with Karen:

> I don't remember a lot of specifics. The years just sort of run together in my head. I have to stop and think about how many years I've taught and then I shudder. (Prof Exp, 1A, 1)[1]

Instead, I found it more effective to conduct semi-structured interviews with Karen in which we traced her initial interest in the social sciences and in teaching, and moved forwards and backwards in time. In this manner Karen recalled numerous specific events throughout her teaching career. Events in Karen's personal life were brought up by Karen as she talked about different time periods in her career, rather than through direct questioning about her personal history.

After each interview was completed, I organized information from my notes into chronological order indicating critical events that were discussed. These interpretations were checked with Karen at the next interview to be sure I was not interjecting a change at some point in her career that she, herself, did not see. Through this process of initial analysis while interviews were still being conducted, and then final analysis of the professional experience interview data, six distinct phases were identified in Karen's career: (1) An Interest in People, (2) Falling into Teaching and Surviving, (3) A Supportive Environment,

(4) Somebody's Baby, (5) Close to Leaving, and (6) A Fateful Confluence (Figure 4). As each phase is described, the changes in Karen's knowledge and beliefs that appear to have taken place, and the factors influencing that development, are discussed.

**Phase I: An Interest in People**

> I was always a good student in math and science. I mean I got good grades and I'm interested in science. I always read the science column in the news magazines. In a lay way, I'm interested in that. I thought at one time I wanted to be an archaeologist but really when you come right down to it, it's always been people that interest me. (Prof Exp 1A, 1)

To this day, Karen recalls reading a biography of Clarence Darrow when she was in eighth grade and how that inspired her to think about a law career as a way to "defend the underdog." Toward that end, Karen began her college career at a small, two-year liberal arts college in the South. This school was selected because her parents had both taught there, and its location met Karen's criteria of being 1,000 miles from home. Karen remembers her favorite courses as "The Bible as Literature, Greek Mythology, and Humanities."

Through professor friends of her parents, Karen became aware of a pre-law program at a large, state university in the northeast. The program required students to complete coursework in a variety of social sciences and English:

> I had history. I had to take US History or World, but I chose US I got political theory - political philosophy actually - political science, sociology and I had some psych. All my English courses and so forth transferred in. (Prof Exp 1A, 6)

Karen described in some detail her experiences with two professors at the college, both of whom she feels had a lasting impact on her thinking about teaching. Dr. A. taught courses in history and political science, Dr. M. taught survey research.

| Phase I<br>An Interest in People<br>~1960-1964 | Phase II<br>Falling into Teaching and Surviving<br>1964-1967 | Phase III<br>A Supportive Environment<br>1967-1971 |
|---|---|---|
| Clarence Darrow biography<br>Two-year liberal arts degree<br>Pre-law program | Teacher education program<br>Political Science graduate courses<br>Student teaching<br>Substitute teaching<br>First year of teaching | New faculty member at Jefferson<br>Smoker's lounge |

| Phase IV<br>Somebody's Baby<br>1971-? | Phase V<br>Close to Leaving<br>?-1984 | Phase VI<br>A Fateful Confluence<br>1984-1994 |
|---|---|---|
| Birth of first child<br>Rep for social studies committee<br>Curriculum development work | School-wide events:<br>Pete's Week<br>Excellent School award<br>NCA Evaluation | Laurie's arrival at Jefferson<br>ASCD articles on thinking skills<br>Summer curriculum development<br>Teacher presentations |

**Figure 4 - Phases in Karen's Career**

Dr. A was undoubtedly Karen's favorite professor in college. She describes him as a teacher who was so popular with students that literally hundreds of students who were not enrolled in his classes would attend his lectures. Despite her admiration for Dr. A there were two specific issues that Karen described that were troublesome for her: one focuses on evaluation, the other on what she feels she learned. With regard to evaluation she experienced frustration that Dr. A could not articulate how she needed to improve:

> T: I never got anything but a C from him. I had A's in everything else. ... I went to see him I don't know how many times. "What am I doing. Why am I not...?" He never could tell me what didn't measure up. All he could tell me was, "All you are doing is rehashing what I have told you and that's not what I want you to do." "Well, what do you want me to do?" He couldn't tell me except that old proverbial line from the Supreme Court Justice, "I'll know it when I see it." That made a big impact on me because it bothered me that he had this picture in his head, and it has bothered me continually now that I'm on the other side of the fence. If I can't articulate the expectation, there is something wrong. It's a violation of due process it seems to me to tell a kid, "This isn't good enough for an A but I can't tell you what is."
> I: So you remember consciously thinking back to him when you started to teach?
> T: I think that it has always been there in the back of my mind as a very influential factor. ... If I can't articulate it, then I will not hold the kids accountable. (Prof Exp 1A, 4)

Karen also expressed disappointment when she reflected back on what she felt she had learned in Dr. A's courses.

> He was a wonderful teacher. We loved his classes. But you know something, I don't remember anything from his classes. ... He was just fun to listen to. ... He had so many things going for him and there's a lesson in that to me. Despite the fact that I did every assignment he gave us religiously, I went to every lecture, I took reams of notes, I carried away very little in terms of long term knowledge. Which leads me to thinking, "We've got to change our style of teaching. (Prof Exp 1A, 6)

While Karen recognized that Dr. A's style of teaching made the subject appealing, she still emphasized the lack of memory of anything from the class:

> I did come away with a great deal of interest in those subjects but I

> really don't know much about them. What I remember from the course has nothing to do with the content. I remember the impressions. (Prof Exp 1A, 6)

Even though Karen clearly viewed Dr. A as an extremely talented lecturer, she obviously had concerns about the effectiveness of his style of teaching since she knows that she did not retain much of what he said, and she objected to his approach to evaluation because he could not articulate what he wanted his students to do. Yet, she appears to have appreciated him as a thinker, and perhaps that's the most important thing he offered her as a future teacher:

> Dr. A. was fascinating. ... The things that I remember about him were things like the fact that he got up every morning and read the major newspapers from Bonn, Paris and London and he had the world's greatest connections - this will date me - of Adenauer and DeGaulle. ... He would start out every lecture with these Adenauer and DeGaulle jokes. They were so funny and they were always topical. I mean straight out of today's news. That really impressed me. (Prof Exp 1A, 5)

The other memorable professor in her pre-law program, Dr. M, was quite a contrast to Dr. A in Karen's eyes. She clearly does not have the same positive feelings about this professor:

> I respected Dr. A in the fact that he would sit for hours trying to tell me what he wanted. He just couldn't do it. She [Dr. M.] wouldn't even try. (Prof Exp 1A, 5)

One incident in particular made Karen feel quite negatively toward Dr. M. According to Karen, Professor M had instructed the class to write a very concise summary of the Little Rock High School confrontation, no more than two pages. Karen remembers struggling, without the aid of computers, to write and rewrite this paper to conform to the page limitation, but in the end, the criteria was not enforced:

> But I'll tell you, I analyzed and re-analyzed and I finally got it down to two written pages. Now, there were no margins on the page to speak of but I got it down to two pages. I'd gone over it and over it and felt like I

> had really managed to keep everything that was essential. I got an A- and the kids who got A's were the ones who handed in 10 or 12 pages. I have never been so angry in my life. When I went in to see her, I said, "You specifically said...," and she denied it. She out and out lied that she had said that. At that point, I kind of lost all respect for her. (Prof Exp 1A, 6)

Again, an evaluation experience has made a lasting impression on Karen. Given that she received a good grade anyway, the real issue for Karen seemed to be her perception of the rules changing, particularly since that caused her to waste a great deal of time to meet the criteria.

Despite her negative reactions, Karen clearly feels that the courses taken with Professor M were quite important:

> I will tell you that the two most useful courses I ever took in terms of what I do [teaching] had to do with survey research, not education courses. (Prof Exp 1A, 5)

In addition, the approach that Professor M used in the courses contrasts sharply with Dr. A and Karen is clear on how she feels that affected her as a learner:

> I think the reason I got so much out of those courses is I had to do something. We had to specifically write and critique questions. We didn't just study polling. We studied about the mechanics and how to do it. I think that's why I carried something away from it. (Prof Exp 1A, 6)

When comparing the impact of these two professors on Karen, the picture is slightly confusing. On the one hand, she liked Dr. A as a person and found him approachable, and while she thought he was a charismatic lecturer she learned very little content in his classes. Dr. M, on the other hand, was perceived as unapproachable and unfair, but her courses were conducted in a way that made the content meaningful and memorable, and Karen has found the information from the course useful in her teaching, particularly in her approach to testing.

A lasting impression Karen carried from her own schooling was a sense of confusion about what constitutes learning:

> Based on my own perceptions of my own learning and my own history in school, my schooling was very frustrating in the sense that ... I remember hearing all the years that I was growing up that I was never working to my potential ... Bear in mind, despite the fact that I was a straight A student, I was never working up to my potential. No one could ever articulate to me exactly what it was that I was doing... in what way that was below my potential. The result was that I came out of college with a whole lot of skepticism about teaching and learning. (Prof Exp 1A, 1)

These apprenticeship of observation experiences (Lortie, 1975) are vivid memories for Karen. Whether they represent a cause and effect relationship with her future teaching is unclear, but most assuredly, they reflect current beliefs about the importance of stimulating student interest while also developing student understanding, as well as a belief that teachers should be able to clearly articulate their expectations to students and tell them what they need to do to reach those expectations. While Karen never articulated directly any pedagogical knowledge that may have developed during her K-12 experiences as a student, these college experiences provide evidence of the existence of such knowledge before Karen considered becoming a teacher. This phase of Karen's professional experience also seems to have contributed to development of her subject matter knowledge, although, at that time, for the purpose of practicing law, not sharing it with children.

Curiously, Karen appeared to give up her dream of being a lawyer rather easily. She was tired of going to school and wanted to invest time in a relationship back home. However, it seems that her decision was influenced in no small part by Karen's perception of gender inequities. There were few female lawyers at the time for role models, no law school near her home town, and no encouragement from anyone to pursue a law career:

> I never applied to law school. In those days, it wasn't easy for a woman

> to get into a law school. It was before the big change. I didn't get much encouragement from anybody to be honest with you. At that point, my eyes were on, believe it or not, a home and my china and my silver pattern. I was going to be the house frau. (Prof Exp 1A, 7)

**Phase II: Falling into Teaching and Surviving**

> My father said I should get my education credits because that was a good job for a woman and you could always teach. Okay, sounds good to me. As long as I was going to school, they were happy. ... I never intended to be a teacher. I fell into it. (Prof Exp 1A, 7)

After making the decision to earn a teaching certificate, Karen attended a nearby college for one year. She took classes for two quarters and then completed student teaching in the spring. While the focus of this return to school was only to earn a teaching certificate, Karen also indulged her love for political science:

> At first, all I took were education courses, what I needed to get certified. After one quarter of that, they were less than challenging, I enrolled in two graduate courses in Political Theory so I wouldn't die of boredom. I loved those so I took two courses in Political Philosophy, too. Other than that, I was just getting what I needed to be certified to teach. (Prof Exp 1A, 7)

Karen does not have fond memories of her teacher education coursework from thirty years ago. From her remarks, she found the content less than stimulating and she shared only memories of very inadequate teaching:

> I remember being very frustrated. I had to take a course in testing and measurement, which, after the two courses I'd taken in survey research were so pathetic by comparison. ... I remember I'd taught a 'class' that year unofficially in the student union because everybody else in the class could not understand the way she taught us to calculate standard deviation because it made no sense. ... Anyway, I survived those. (Prof Exp 1A, 8)

In this respect, Karen's story is quite similar to the five high school veteran teachers portrayed by Cohen (1991), who also disliked their teacher education programs:

> It was the love of subject, rather than a love of teaching per se, that initially drew these teachers into certification programs. In fact, it was the love of subject that kept them on track even when those programs became demoralizing or irrelevant. ... In every case teacher education courses were characterized as boring, useless and intellectually demeaning. (p. 98-99)

Karen's teacher education program did not include any field experiences with junior high or high school students. This occurred for the first time in her placement for student teaching:

> The only contact I had with kids is when I started student teaching. ... I will tell you that when I went out to student teach, I was totally unprepared. (Prof Exp 1A, 8)

For student teaching, Karen was assigned to a 7th grade geography class in a junior high. Even though Karen had completed an interdisciplinary pre-law degree and had taken four graduate level social science classes while taking her education coursework, geography was a subject she had not studied since she, herself, was in 7th grade. She felt her cooperating teacher was not a particularly good model and she basically began full-time teaching after a few weeks of observation with very little idea of what to do:

> I walked in and on the second day I was there he more or less turned the classes over to me if I wanted them. I took them and sort of did my own thing. I don't think I learned much but I got through it. (Prof Exp 1A, 9)

Karen has few memories of eventful experiences from her student teaching. She did recall a unit she taught on the Soviet Union for which she used some knowledge from her Russian course in her undergraduate program:

> I brought a bunch of things that I had that were in the Cyrillic alphabet. Of course, this was a real eye opener to the kids. They didn't even realize that the Russians used a different alphabet. I did sort of teach them a few words in Russian. (Prof Exp 1A, 9)

Another memory, also from the same Soviet Union unit, was the fact that her

cooperating teacher was extremely alarmed that a student in one of the classes had checked out Das Kapital from a local college library:

> David was scared out of his wits that the student's parents were going to think that he had assigned it. He had apparently been just enough older than me to have come through and remembered the McCarthy Era very vividly. I mean he was really terrified and I just couldn't imagine that. .. Nothing ever came of it but I remember how scared David was because I didn't tell the kid he couldn't read it. (Prof Exp 1A, 10)

Karen had no other vivid memories of her student teaching, other than she was engaged to be married on her last day. The wedding took place the following fall and Karen did not apply for a regular teaching position, still believing she would be a housewife. She spent that school year substituting at the high school on the north side of town:

> I rather enjoyed it. I don't know if I would have enjoyed it at the junior high level. I was doing it at the high school and I knew everybody, a lot of my old teachers. There hadn't been a lot of turnover yet. (Prof Exp 1B, 1)

At the end of the year both Karen and her husband reconsidered her lack of full-time employment:

> I realized a house frau was not my cup of tea and my husband, who had sworn that no wife of his was ever going to work, had decided that maybe there were worse things in the world than his wife working, like when she'd go to the library and check out fifteen books and he'd come home and I'd still be in bed at 5:00 in the afternoon reading a book that I had started that morning or as the case might be, my second book of the day. (Prof Exp 1B, 1)

Karen sent in an application to the school district but received no interviews. Three days before school was to start she was called into the junior high on the south side of town. She was hired to teach 7th grade geography and 8th grade US History. Similar to her descriptions of surviving her teacher education courses (despite boredom) and "getting through" her student teaching experience, Karen described her first year of teaching as "sheer survival."

Ill-prepared in her teacher preparation program for actual contact with students, disappointed with the model she had observed during student teaching, and once again responsible for geography, as well as US History, Karen found herself in a basement classroom of an overcrowded school. The classroom was called "the dungeon" by other members of the faculty. It was actually a converted locker room with a cement floor and a drain in the middle of the room. The ceilings were so high Karen couldn't reach the bottom of the windows standing on a chair. Although apparently an overwhelmingly negative experience altogether, two broad areas of dissatisfaction with her workplace emerged from the interviews: the treatment of students and the treatment of faculty.

Karen was disturbed by what she perceived to be blatant discrimination against students:

> If you were a member of what I call the country club elite, your child would never get anything lower than a B no mater what they did. The principal would see to that. ... And yet, the school had a very mixed student body. We had a lot of kids from the northside elementary school who were dirt poor. Those kids couldn't do anything right. (Prof Exp 1B, 2)

Karen felt that this discrimination was also revealed in teacher assignments and in materials as she saw distinct differences between the lower track geography class she had and the other classes:

> They had tracking of course and the lowest track, every one of their teachers except one were first year teachers right out of college. That was, in the principal's eyes, how you earned your stripes. The English teacher was an experienced teacher who took them [the lower track] because she was a very professional person who cared and worried about those kids. .. The principal told me when I was hired that their were no textbooks [for that class] but I could have all the construction paper I wanted and basically my job was to keep them busy. (Prof Exp 1B, 3)

The principal in the school was very controlling, right down to overseeing teachers' materials:

> Teachers were not allowed to use any of the duplicating equipment and no secretary could run off your dittos until the principal had initialed them. (Prof Exp, 1B, 2)

Perhaps most alarming to Karen was that the principal actually refuted the authority of his teachers in his pursuit of differential treatment of students. Karen descried two specific occasions on which this happened. The first event took place during a test:

> One day I was giving a test and that was a day that the principal came in to observe my class. He walked in and he started going around the room to see how kids were doing on the test, and he was giving them answers. At which point, I went up and tapped him on the shoulder and asked him to leave. I was so mad. I said, "I'm sorry but I'm not testing to see what you know." (Prof Exp 1B, 5)

Karen described another incident which involved a particular student from one of her classes. This student had not turned in assignments or even completed tests so Karen put an F on his report card only to see that grade changed:

> All report cards went across the principal's desk. This was a kid in my homeroom so it came back to me to hand out. I looked at his report card and sure enough, the principal had erased my F and changed it to a B. (Prof Exp 1B, 5)

This incident spiraled into a major conflict with her principal as she shared her displeasure with him, changed the grade back against his direction, and then was chastised by the principal when he found out the grade had been changed.

Perhaps because of this antagonistic relationship with her principal, Karen discovered the comfort of talking with peers. She had become a smoker in college. While the smoking lounge in the school was "the men's smoker," Karen met with two other women smokers in the teachers' shower area of the girls' locker room. These smoking breaks, particularly the conversations with a

social studies teacher who was in her second year, were Karen's opportunities to talk about teaching. Mostly though, conversations revolved around larger issues in the school rather than day-to-day teaching, and frequently the meetings were a way to vent displeasure with the principal.

Karen was not able to reveal too much about her day to day teaching. She apparently spent a great deal of time trying to find materials for the low track class which did not have textbooks, and the other geography class which had an outdated textbook:

> I went down to the Chamber of Commerce and got a whole bunch of maps of the city and decided, if nothing else, I was going to teach them the meaning of maps. So I started out with that. ... Then we graduated to a state map. We learned highways and so forth. Then we graduated to maps of the United States. This was a fast as I could come up with them. ... I went to the district office to the instructional resources and found some workbooks and I was able to have things copied down there. By Christmas time, I had come up with some things and then was basically able to get through the year. (Prof Exp 1B, 4)

Karen seems to have stumbled upon a style of teaching. Although she described a desire to have her students active, the activity has more of a flavor of keeping students busy than meaningfully processing information. Karen described instruction which consisted of having students read the texts and do quizzes, using ready-made supplemental materials, and, in history, sharing her background knowledge with students. In some way, Karen was probably dipping back to what she saw teachers do when she was a student.

Given Karen's descriptions of the classrooms and the students, the principal, and the staff, her first year seems to fit Huberman's (1989) description of a "painful beginning" to a teaching career:

> Painful beginnings are made up of role overload and anxiety, difficult pupils, heavy time investment, close monitoring by administrative staff, and isolation inside the school. (p. 42)

Karen's first year of teaching was so painful, in fact, that she decided she would not return:

> I told the director of personnel that I heard there was an opening at the other junior high and I was very interested, and if I could transfer there, I would sign my contract, otherwise, I was going to resign. He said, "Consider it done." So I came to Jefferson the following year. I probably would not be teaching today otherwise. No, I just would not have gone back there for anything. (Prof Exp 1B, 8)

This three-year phase of Karen's career, which could have ended with her leaving teaching, appears to be best characterized by the word survival, not a concept one associates with development and growth. Rather than observing models of exemplary teaching to imitate, Karen felt she learned what not to do from her teacher education professors, her cooperating teacher during student teaching, and her principal during her first-year of teaching. The experiences Karen shared from this phase, however, indicate some of her knowledge and beliefs at the time, and also suggest ways in which she was changing and why.

Karen's subject matter knowledge developed in two different ways. First of all, during her preparation for teaching certification, Karen completed four graduate courses in the social sciences. As in her undergraduate work, the focus for these courses was politics and political theory. Karen chose to take these courses out of interest and a desire for intellectual challenge and stimulation, something she felt was lacking in her education courses. She never made any comments that connected what she learned in those graduate courses to what she learned about teaching. It appears there was a clear demarcation between this pursuit of subject matter knowledge and pedagogy.

The second way Karen's subject matter knowledge developed during this phase was through learning on the job during her student teaching placement

and first year of teaching. Karen felt very unprepared to teach geography, a subject she says she hadn't really studied since she was in junior high, and somewhat prepared to teach history. Such lack of subject matter knowledge for what one is to teach is obviously of concern to all prospective teachers, but in the social studies, in particular, where certification usually covers six or seven different disciplines, the likelihood of teaching out of one's area seems great (Wilson, 1991; Wilson & Wineburg, 1988; Wilson & Sykes, 1992). Karen developed subject matter knowledge from the textbooks she was assigned and from the supplemental materials she located on her own. There appeared to be no systematic attempt on the part of school personnel to facilitate Karen's introduction to new disciplines. At one point during her student teaching experience, Karen designed instructional activities based on content from her undergraduate course in Russian. This is the only instance she shared of connecting specific subject matter knowledge learned at the university with her own teaching.

In terms of pedagogical knowledge, Karen gave no indication that she developed meaningful ideas about teaching in her education coursework. In fact, she reiterated her previous comments about the value of the courses in survey research she took, as opposed to her education courses. There is no evidence to support specific beliefs about learners that Karen developed during her teacher preparation program. In fact, she indicated that she had not worked directly with children before her student teaching experience, so she had had no opportunities to observe children and connect her observations with the information in her courses. Karen's experiences in her first year of teaching, however, suggest that she brought to teaching a belief in students' abilities to

learn that was strong enough to be tested on a daily basis by the contradictory beliefs held by her principal and others in the building:

> I look back on it [teaching the low track class] knowing what I know now - this class was a real mishmash. There was one boy in there certainly because he was severely emotionally disturbed. I mean this kid should have been under treatment. There was a girl who was in there because she was completely deaf. She could read lips if you could get her to look at you but that was easier said than done. The rest of the kids, out of the other 15, 12 of them were probably learning disabled, maybe dyslexic. They couldn't read. They were not dumb kids. There was nothing wrong with their intellect but they couldn't read and because of that they were classified as non-learners. The term that was most commonly used among the staff was doorknobs. (Prof Exp 1B, 9)

From Karen's perspective, she was surrounded by a climate of low expectations for certain students, and yet she did not develop these same beliefs, and, in fact, gravitated toward the few teachers who thought like she did about students. Perhaps the same feelings of helping the underdog that inspired her to pursue law, had been transferred to students whom she perceived to be underdogs, in this case, the students who were from less affluent families and the students in her low track class.

Karen had begun to experience collegiality during her first year of teaching, although with a very small number of fellow teachers, and mostly as a way to cope with a bad situation. As she entered the next phase of her teaching career, at Thomas Jefferson, she found a type of collegiality that was much broader.

**Phase III: A Supportive Environment**

> I would guess that the average age of the staff when I joined at Jefferson was probably in their late 40's and I was about 25, I suppose. They treated me very much as a youngster. They kidded me about my short skirts ... but it was certainly a much more supportive environment. (Prof Exp 1B, 12)

As the youngest faculty member, and someone who had student taught in the building two years earlier, Karen admitted to having a little trouble seeing

herself as a colleague. Once again, however, Karen's smoking habit put in her daily contact with other teachers. In this school such interactions with fellow teachers had a much different feel to them:

> I'll tell you, the smoke room at Jefferson for a good many years was probably one of the most intellectually stimulating places you could choose to be. There was an English teacher who was a very keen observer of kids, and a math teacher, and the man who is now the director for instructional technology in the district. There was a group of us who watched and reflected and talked and asked questions, and I think kind of goaded each other. Now, significantly, none of them were social studies teachers. But it was a very supportive environment because I was never ridiculed for asking questions. It was the sort of environment where you never worried about admitting that you were having problems or that maybe everything wasn't hunky-dory in your class. Yes, there were some jokes made about some kids but there was never the mean spiritedness that you hear about in teachers' lounges. (Prof Exp 1C, 4)

An important change that took place in this phase for Karen was that she was in a school where her fellow teachers had generally positive attitudes toward students. She perceived the school as a safe environment for sharing what was happening in one's classroom. However, as Karen noted, it is significant that none of the teachers with whom she regularly spoke was a social studies teacher.

Having come close to resigning at the end of the previous phase of her career, Karen had the opportunity in the supportive environment at Jefferson, to work toward stabilization (Huberman, 1989) as she committed to the field of teaching. With stabilization comes increased confidence, a sense of being at ease with one's performance in the classroom. Because I have no evidence to the contrary, I am assuming that Karen began to experience more comfort with her instructional competence after her first few years at Jefferson. It would seem reasonable to conclude that the collegiality at the school provided the

conditions for Karen to begin to develop a style of teaching, something which did not take place during her experiences of student teaching, substitute teaching, or her first year of teaching.

Karen was apparently able to talk to other teachers at Jefferson about what she was doing in her classroom and to ask questions, thereby taking advantage of their years of classroom experience. She was not in daily contact with a social studies teacher, however, so it is unlikely that she was developing much subject-specific pedagogical knowledge from these interactions. Instead, Karen mentioned that during this time in her career she read a number of books on classroom management and discipline. This certainly reflects the literature on the perceived needs of beginning teachers (Kagan, 1992; Veenman, 1984), and my assumption is that organization and management concerns were much of what Karen addressed in her discussions with other teachers during the early years of teaching.

While Karen continued to move toward stabilization into the next phase of her career, the birth of her daughter four years after joining the staff at Jefferson appears to be of such significance that it stands as a critical factor in influencing Karen's thinking about teaching, and therefore, warrants the beginning of another distinct phase in her career.

**Phase IV: Somebody's Baby**

> After Jessica was born, in the fall when I went back, I walked in and for the first time every single, individual child in that classroom was somebody's baby. I'd always tended to see them as groups, and that's all I saw, was the characteristics of a particular group. I started to see and to become much more aware of individual differences and the individual child. (Prof Exp 3C, 1)

Karen feels that the birth of her daughter changed the way she viewed her

students and triggered important changes in her thinking about teaching. During more than one interview Karen discussed the way that watching her firstborn made her think about her students. She was fascinated by the way her daughter enthusiastically explored her environment. After five years of full-time teaching, she returned to school in the fall with a different outlook. She began to focus on student learning and curiosity rather than "covering" history:

> After Jessica was born I was just fascinated with watching her learn and figure things out. And then I'd go to school and I'd look for what happened. Why don't these kids have that same compulsion to figure things out that an infant does? How have we killed it? They are born with it. That was the biggest change because I felt a compulsion to want to understand how do kids learn and particularly what do we do in school that influences that learning or lack thereof? That's really where I started to change because before her birth my whole focus was on history. Once I had children, my focus has not been on history other than in the sense of how do we acquire this knowledge. Why do some kids do it and others don't? So that's the big change. (Prof Exp 3C, 1)

Meanwhile, Karen was still experiencing feelings of comfort and having collegial relationships with other faculty. Karen expressed great admiration for a geography teacher who was in the building at the time:

> I had a lot of respect for her. She was the one who started teaching urban geography n 9th grade and had the students construct a city. I think from her I became real intrigued with the idea of *doing things*. (Prof Exp 1B, 12)

And about another geography teacher Karen said,

> She kept me going a lot of times when I would get discouraged. (Prof Exp 1B, 15)

However, in terms of working with another social studies teacher, particularly in history, that was not happening and Karen was still doing her planning on an individual basis:

> There was no one in the department who was interested in working with me and I wasn't interested in working with them because they had to many fill-in-the-blank worksheets. It was just too cut and dried and I

couldn't deal with it. (Prof Exp 1B, 12)

Perhaps as a way to interact more directly with social studies teachers, Karen volunteered to be the school's representative on the district-wide K-12 social studies study committee. The committee had the final say on textbook adoptions and approved or disapproved of motions brought by individual schools for changes to the district's scope and sequence. One complaint that Karen voiced about the study committee in social studies was that there seemed to be continual discussion over what should be in the social studies, similar to the ongoing debate she has seen in the professional organizations in social studies:

> You take any year's issues of the National Council for Social Studies journal [Social Education] and there's a sustained argument over what are the social studies? What should we teach? One thing that is never in there is how should we teach it. It's like they are a bunch of ostriches with their heads in the sand, and if you don't address the how, the what is irrelevant. (Prof Exp 1C, 2)

Karen also did curriculum development work during this time. Much of the work was completing during the summers with Karen working alone, or in one case, with elementary teachers. She remembers that during this period she focused on developing individual learning packets intended for students to use in a self-paced fashion. While Karen used these materials in her classroom, she had no memory of anything she ever developed being disseminated in any way. Interestingly, Karen reported that information from these packets she created in the early to mid-70's still exists in her classroom in another form:

> We were really trying to convert everything to behavioral objectives and learning packages. Basically, I constructed learning packages for eighth grade. And actually, that's where a lot of the stuff I now use was originally written. (Prof Exp 1B, 13)

This is a particularly interesting phase in Karen's career because of its complexity. The birth of Karen's daughter was a powerful personal event in terms of her thinking about her students and her role as teacher. Huberman (1989) reports that 62% of his sample of secondary teachers mentioned "having children of school age" as an "event in their private lives that had an impact on classroom life" (p. 52). For Karen, the impact of having school-age children is evident in her next phase. However, at this point in her career, it was the curiosity and exploratory behaviors she observed in her infant and toddler daughters at home that intrigued her. While Karen was learning from the environmental interactions of her children in a Piagetian fashion, she was in an educational milieu that was promoting the development of behavioristic learning packets.

In terms of learning about teaching, it appears Karen continued to gather pedagogical knowledge from other teachers in the building. Even though Karen had experienced "doing things" as a college student in her survey research class, seeing another social studies teacher trying this approach in geography made Karen take notice. Yet, there's no indication that she was able to translate this idea to her own history instruction. While Karen was clearly uncomfortable with the fill-in-the-blank worksheets being used in many of her social studies colleagues' classrooms, it seems that neither her professional experiences with the social studies study committee nor her curriculum development work was able to develop substantive subject-specific pedagogical knowledge to give her more direction in this area.

With regard to subject matter knowledge, Karen acquired a great deal of information during this phase in her career based on her interest in politics and

government. The events in the nation at the time provided Karen with the opportunity to investigate issues related to presidential powers and impeachment. During one interview Karen pointed to a shelf of books about Watergate. Of course, Karen's teaching assignment in US History was pre-Civil War, but she was clearly well-read on the current events of the time which could certainly be an asset in making connections between the present and the past.

Exactly when this phase in Karen's career ended is unclear, but gradually her concern about teaching classes full of 'somebody's babies' led to feelings of frustration and burnout.

**Phase V: Close to Leaving**

> Despite theses things that were essentially positive, I was very close to leaving. I mean if something had presented itself ... I wasn't out actively looking for other employment but I was sure thinking about it. And I was reading everything I came across in the professional literature about burnout. I was very close to abandoning ship. ... I think that there was such a wide gap between my picture in my head about what learning and teaching ought to be about and what the reality was. (Prof Exp, 2A, 6)

One thing that continued to influence the "picture" in Karen's head was her observation of her own daughters' journeys through elementary school. Karen's experiences as a parent made an impact on how she thought about her own teaching at the secondary level:

> I learned a lot from going to conferences when Jessica was in elementary school and the kinds of things these teachers could tell me about my child. I realized that I couldn't tell parents those things about their children. Part of it is, I don't see their children all day, but at the same time my whole thinking about conferences changed. I recognized that when I just hand a parent a grade sheet - it shows them this is what you get docked - what does that tell them? Not that much. (Prof Exp 2B, 3)

This comment reveals the sense of inadequacy Karen was feeling during this

phase of her career when she reflected on what she knew about her students compared to her colleagues at the elementary level. At the same time, the supportive nature of her own school environment continued to be a positive influence for Karen. In fact, several specific events happened during this phase that solidified the collegial nature of the school. A teacher in the building had been injured in an accident and the principal, along with a group of teachers, proposed that the school sponsor fund-raising events to help him remodel his home and purchase a van. The school faculty came together and organized a week's worth of activities to raise money:

> The PTA got involved. We staged a carnival. We had a raffle. We did all sorts of things and it sort of drew everybody together- parents staff, kids. (Prof Exp 1A, 11)

Pete's Week was such an affirming experience that seemed to have brought out the best in the faculty, that the principal decided to apply for the Excellent School Award out of Washington, DC the next year. Indeed, after all the paperwork was submitted and reviewed, Jefferson was cited as an excellent school and every teacher in the building received a medallion on a plaque:

> I think winning the award did sort of further the process, maybe building some self-esteem as a building and opening our eyes. (Prof Exp 1A, 12)

One or two years later, the school completed its first North Central Association evaluation. Once again, the results were positive as the evaluators were quite impressed with the school's report. However, Karen shared an interesting comment about what the NCA evaluation brought about:

> It was kind of an interesting experience in the sense that it was the first time that I ever remember that all of us really sat down and talked professionally and we did it in a context of some super committees and also by departments and really started to look at what we were doing or not doing as the case may be. (Prof Exp 1A, 12)

Curiously, even with the supportive environment and the talk about teaching to which Karen referred in earlier phases, this collegiality never really encompassed all the faculty nor did it involve people in truly reflecting on what they did each day and why. Despite all the collaborative projects, including the reflective meetings for NCA, it appears that Karen perceived herself as an outsider in her department in terms of her beliefs about learning and students, as this statement about one of her colleagues reveals:

> Well, Mary was a very strong social studies colleague but Mary was very strong in her particular content and she was not child oriented. She never had children. She didn't marry until late 40's or 50's. She was a former Army officer and very didactic. Although, she's the one that brought urban geography to Jefferson and she had the kids constructing cities and doing some really active learning things, but she was really heavy into standards and measuring and testing. Plus she was in geography and I was in history and they are different disciplines. She was a very, very professional teacher who certainly had influences on me but we didn't ever work together...I mean there was nobody I could brainstorm with in terms of what I did in the classroom. (Prof Exp, 2A, 8)

Karen was in a school that was supportive of faculty; she had participated on several projects that brought the school staff together; and yet she was not certain she wanted to stay in teaching. Huberman's (1989) description of a phase of reassessment in one's career seems to match Karen's experience. Huberman found that for some teachers, a phase of reassessment after stabilization leads to self-doubts so strong that they consider leaving the profession. As a matter of fact, in his sample, 43% of the respondents considered leaving. Karen's timing of this self-doubt falls into the later end of the pattern discerned by Huberman: "The 'peak' for such moments of doubt was between seven and fifteen years into the profession" (p. 45).

Huberman (1993) refers to a thesis by Sikes (1985) which proposes that

"teachers' desire to heighten their impact on the classroom leads to a heightened awareness of instructional factors blocking that objective and, from there, to attempts to press for more consequential reforms" (p. 7). In Karen's case there is reason to believe that she did have a heightened sense of not accomplishing her objective, an objective she had begun to develop ten years prior. Burnout, or a serious case of self-doubt, was caused by Karen's frustration to enact in the classroom what she thought should be happening:

> I knew what I was doing wasn't working. It was like I was spinning my wheels and I don't know any of us that will stick with something that's fruitless for too long. (Prof Exp 3C)

Karen echoes the research on teacher self-efficacy here. One is not inclined to persist at a task for which there is no apparent progress. Teacher efficacy grows from experiencing success with students, not merely from having the support of administrators and colleagues (Hoy & Woolfolk, 1993).

There is evidence that during this phase in her career Karen was trying to find pedagogical knowledge to experience more success with her students. She joined Phi Delta Kappan and the Association for Supervision and Curriculum Development, while she let her subscriptions to social studies journals lapse. As mentioned previously, Karen was tired of the continued arguments in the journals over what should be in the social studies curriculum rather than discussions on how to teach social studies. By joining these two organizations Karen was reaching out to other sources for assistance in her professional development. It is unclear, however, other than the literature on burnout, what Karen found in the professional journals.

It should be noted that Karen attended whatever staff development workshops were offered during this first half of her career. She was not able,

however, to identify any school-wide or district-wide workshops that had really impacted her thinking about teaching. Since the approach to much staff development at the time was a single workshop on a given topic, it may not be surprising that nothing appeared to have had a major influence on Karen's practice. While Karen had ongoing conversations with colleagues at school, these interactions also seemed to be lacking in terms of helping her reach her goals in the classroom. Her comments about the teachers' discussions for the NCA evaluation are revealing in this regard. For all the collegiality that Karen described at the school, there were apparently few conversations in which teachers actually reflected on their teaching.

Clearly something needed to happen for Karen to increase her sense of self-efficacy, to continue growing as a teacher, and to remain in teaching. That 'something' came in the form of a fellow social studies teacher who joined the staff the following year.

**Phase VI: A Fateful Confluence**

> The first year Laurie and I worked together is the year that we got all the thinking skills issues from ASCD [Educational Leadership]. I mean, we just sort of put them aside and said this is next summer's project. So it was sort of a fateful confluence that these things kind of came together because the next summer we really set out to read all of those. We were going to do something different. (Prof Exp 2A, 9)

The arrival of Laurie to the school staff represents a significant turning point for Karen, who was beginning her 18th year of teaching 8th grade US History at the school. Although Karen had collegial relationships with other members of the faculty, the relationship with Laurie was to be unlike any other professional relationship. Laurie, returning to teaching after taking a number of years off to raise a family, was hired to teach the same subject at the same

grade level as Karen, and she also happened to have Karen's daughter in her class. The two teachers began to have discussions about how they were teaching US History. In the beginning, the relationship was informal, sharing ideas in the hallway and supplying each other with copies of activities.

> Basically, I made everything I did available to Laurie if she wanted to use it. And she used a lot of it, not everything. I remember one thing she didn't use was my tests because she wasn't comfortable with those. (Prof Exp 2A, 10)

By the end of Laurie's first year, the two teachers had decided to work together during the summer on a curriculum development project to develop materials for thinking skills:

> I remember we started with Bloom's taxonomy and we didn't get anywhere until we decided to throw that out the window. We were going to be very systematic. We were going to make sure that the kids mastered every one of these skills and skill levels. ... by the end of June hadn't we thrown that out? [said to Laurie (Prof Exp 2A, 11)

Here we see again the influence of the "learning packet mode" on Karen's approach to curriculum development. Instead of this approach, however, the summer work created a much different product. Throughout the summer, Karen and Laurie read a collection of articles gleaned mostly from Educational Leadership issues from the 1984-85 school year. The authors of the articles and books they read included Barry Beyer, Art Costa, William Glasser, David and Roger Johnson, Bruce Joyce, Matthew Lipman, Richard Paul, David Perkins, Robert Sternberg, and Richard Strong. During this summer project Karen and Laurie developed a style of working together that they would continue for many years to come:

> We would get together [and decide on readings]. We'd both go home and read and we'd get together and we'd talk. Then, we'd go home and we'd both work and we'd write. Then, we'd get together and we'd compare notes and we'd polish. Then, we'd go home and each do our own thing.

> Then, we'd get together and we would continue like that. (Prof Exp 2A, 11)

As confusing as this sounds, it is merely a cycle of conversations in which the two teachers attempted to put theory into practice by first comprehending some conceptual knowledge about thinking and learning, and then transforming that into instructional representations for US History. This work was an invigorating experience for Karen and it cured the sense of frustration she had been feeling so strongly for a number of years:

> I remember very vividly what burnout felt like and it vanished the first summer we worked together. For the first time now, my job became... It had possibilities. It was intellectually stimulating. ... For the first time in my life, research meant something to me other than a burden, a hoop to be jumped through. It became something that was practical. (Prof Exp 2B, 1)

When the school year started up again, they met more formally, for example, at the beginning of a unit, to plan activities. They continued to read and think about how to transform theory into practice, but they also used their own practice, their own classroom experiences, as a basis for reflection. Eventually, they met almost weekly on Sundays to do their planning. They described their sessions this way:

> Laurie: We were really focused on developing new materials and activities for kids to do. The textbook gave us a subject or topic...
> Karen: ...it would give us the structure. I think we usually started with calendars and we knew that these were the reading assignments. Then, we would sit down and we'd focus on what ideas we wanted to address. I can think of numerous occasions where Laurie would come in with a new idea and I'd sit down at the computer and we'd brainstorm. We'd type something up and then we'd print it out. Then, I got the photocopier and we'd make copies. Then, we'd start editing and we'd talk. How would we introduce this? Is this going to work? (Prof Exp 2B, 6)

Some things changed for Karen immediately after the summer of 1985. One was the deliberate focus on thinking skills in the classroom using the new

activities they developed and a method of evaluation that focused on being prepared and participating. Other changes developed gradually over the teachers' long partnership together. For example, in their first years implementing their ideas in the classroom, they would ask students to push their desks into groups for specific activities. Gradually, they did most activities in groups and they went to the district's furniture warehouse to scrape up discarded tables and chairs for their classrooms. Eventually, students' final exams, and then unit tests, were given in groups as well.

Things started to happen to increase Karen's self-efficacy and to make this a renewal phase (Huberman, 1989) in her career, finally addressing her feelings of self-doubt. She saw in this partnership with Laurie, a way of thinking about teaching problems that she had not experienced before:

> Since Laurie and I worked together, we sort of fell into a problem solving mode and we found solutions that worked. Before that, the environment was very supportive in the sense of helping me recognize problems but nobody had any real solutions. We were real good at explicating problems but we were sort of at a loss for finding solutions. (Prof Exp 2A, 7)

Some of Karen's earliest concerns about student curiosity and exploration that she gleaned from watching her own young children were beginning to be addressed in her classroom. This is revealed in her comments about what she saw in the small groups:

> I think two things had an enormous impact on me. One was the fact that kids would try things that I couldn't get them to do before. A lot of the helplessness disappeared. That was one thing. The other thing that had an impact on me was listening and realizing that the kids had so much more thinking ability than I had ever seen before. (Prof Exp 2B, 9)

Such a response is similar to other teachers' remarks about their students when they have embarked on a change in the focus of their instruction and the

interaction patterns in the classroom (e.g., Wood, Cobb & Yackel, 1991; Hunsaker & Johnston, 1992; Wilson, Miller & Yerkes, 1993).

One reason that Karen and Laurie were able to try a different approach to teaching, was that through their working together they were experiencing what they wanted their students to experience:

> When I linked up with Laurie, I think the biggest change for me was that through our conversations with each other I began to understand a lot of things about myself and how I learned. I had a new vision of learning because I had never worked to learn. I'd never worked on a study group or with a study group. I had never worked with a partner. I had never learned in a cooperative way and it's very hard to go into a classroom and implement cooperative learning if you've never learned cooperatively. I think the biggest thing I got out of working with Laurie is that I got a vision in my head of how it might work. And from our work together, it would give me ideas that I could go in and try to implement in the classroom. How can I reproduce this with my students? (Prof Exp 3C, 1)

Through this work together, Karen and Laurie were able to realize new conceptions of teacher, student, teaching, and learning. On more than one occasion Karen mentioned that she was using many materials that were not so different from what she used in her earlier years of teaching. On more than one occasion I tried to pin Karen down on what she meant, sometimes with more success than others. This response rather clearly demonstrates some of the changes that took place in her knowledge and beliefs about teaching and learning:

> Fifteen years ago I would have handed it [an activity] out as a worksheet, I would have had each kid work individually, and then I would have collected it and graded it. And now, they work in groups, I don't grade them, and I've changed it [the worksheet]. When I say I use a lot of the same things what I'm really using are the statistics charts or the tables or the primary sources and what I have changed is the nature of the questioning. ... What we're doing is dealing with their metacognition. Making them aware of their own reasoning process, and usually, just the act of you know, if one group has said something's accurate, and another group says no, it's inaccurate, once they have explained why, usually the

> group that I would disagree with figures it out for themselves. And so, they do their own correcting in a way, and in the process of course, I'm becoming aware of their thinking; they're becoming aware of their thinking; and I'm leading them, but I'm not telling them. That's the biggest difference. (Prof Exp 3A, 4)

Karen and Laurie had changed their roles in the classroom. Karen spent most of her time listening to her students talk in groups. She became someone who facilitated student discussion through assignments, introductions, and debriefings. Through this change she got to know her students better, something that had been important to her since her own child was in elementary school:

> I spend a majority of my time over a given week walking around observing and listening. I found that I could tell a lot of parents [at conferences] a great deal about how their child's learning. (Prof Exp 2B, 4)

The role of this collegial relationship on Karen's teaching cannot be overestimated. These two teachers took it upon themselves to spend time reading professional articles and books and attempting to plan instruction in line with the ideas expressed in their reading. They then used their classrooms as testing sites and reflected back on their interpretation of the research and the worthiness of their implementations. They also represented a significant support system for one another, providing reassurance when things looked grim. In listening to them reflect back on this period, it was striking to hear how they felt they complemented one another's needs:

> Laurie: One of the things Karen helped me with, I don't think I ever told her this, is that...you know, you learn that intelligence is strategies, content, and neurological processing and she has shown me an amazing number of strategies in terms of thinking. I just simply didn't know them. She was a good student and I was an okay student because I worked hard but I lacked those strategies. So, she not only taught them to me but she taught me how to make them explicit to kids. I feel that I am a much better thinker than I ever was before I met her.

> Karen: She [Laurie] gave me the support network I needed to change. She was the idea person. She credits me much more than is justifiable because I never would have tried these things. I never would have come up with the ideas. Laurie calls herself a random thinker. Well, I think I'm more random than she thinks I am, but I'm not that creative. I'm very good at taking someone else's idea and translating it into a practical reality. But to come up with the original idea; I have never been a good originator. (Prof Exp 2B, 2)

Another factor that had some influence on what Karen and Laurie did in the classroom occurred when they were asked to be presenters at a local college's reading conference because they had gotten some press in the local paper for their attempts at teaching thinking, and people were beginning to hear about their work. This began a series of presentations that the two teachers did together across the state, and they expressed how beneficial this was in helping them think clearly about what they were doing:

> It's sort of like the accountability that we're looking for with students in a way when we ask them to do a project and write. We had to sit down and think what we were doing so that we could articulate it to someone else. It was the process then of becoming presenters that enabled us to develop the skill of articulating what we do. (Prof Exp 2A, 9 & 10)

> It was reflection. We had to stop and reflect on what we were doing. And because we had to stop and try to explain it to someone else, you become much more proficient at what you are doing. (Prof Exp 3C)

The fact that Karen moved from considering leaving the profession before Laurie came to Jefferson, to giving presentations for other teachers, indicates that Karen had moved from a phase of serious self-doubt to a phase of renewed interest in teaching. Huberman (1992) reports that one predictor of a teacher who ends her career with a positive focus is "the experience of achieving significant results in the classroom" (p. 131). I believe Karen's collaboration with Laurie exemplifies the criteria Huberman suggests for this phenomena:

> It had to do with a long, almost magical string of years in which

> apathetic students came alive, classrooms buzzed with purposeful activity, relationships with pupils were intense, and performance levels were well above the average. (1991, p. 131)

It would appear obvious that this phase of Karen's professional experience is the most significant in terms of her professional development. Karen's perception is that she developed a radically different view of the teacher and the nature of instruction during this period:

> I think as I saw my role when I started teaching, it was really to decide what we studied. To take this enormous field of history, and geography, which I taught that first year also, and decide exactly what we would focus on, and to provide the structure that would enable the kids to learn it. When Laurie and I gave our presentations, we talked about changing the kids' perception away from the teacher as the fountain of information, and instead to the teacher as a coach. And, I think, that also articulates what has happened in my own life, because when I started, I was the fountain of information. I showed them where to go to find information - I basically led them by the hand, and said, here it is, now you learn it. And now, my focus is to look at the content, to take what I know about how people learn and ask myself, what can I do to structure my classroom to facilitate that learning. I'm still the organizer in a way but the kids are the workers. (Prof Exp 4, 6)

It seems likely that Karen had fairly substantial subject matter knowledge in US History before her interactions with Laurie. She had had 17 years of exposure to the content, had done numerous curriculum development projects over the years, and had been through three different textbook series. What seemed most significant in this phase of her career was the development of pedagogical knowledge. Karen and Laurie had access to a body of professional literature that explored the nature of student learning and thinking: areas that concerned Karen and had not been adequately addressed for her by her own experiences in school, her teacher preparation program, or her interactions with fellow teachers either as a beginning teacher or a more experienced teacher. Karen and Laurie combined their own subject matter knowledge with their

developing general pedagogical knowledge, and created subject-specific pedagogical knowledge. They transformed their content by applying the principles they were coming to understand about learning and thinking.

Just as important as what Karen and Laurie did, is how they did it. The collaborative method they discovered for reading, interpreting, and applying research was an excellent model for the view of learning they were hoping to facilitate in their classrooms. It seems significant that Karen was working with a teacher who taught the same material at the same level. She had had many conversations over the years with other teachers, even other social studies teachers, but never had she worked with another US History teacher. They were able to share and reflect with one another about how activities worked in their classrooms. They shared perceptions about why something worked or didn't work, and they provided each other with continual support and encouragement:

> We constantly reminded one another to focus on the positives. It's so easy to look only at something that didn't work, and to lose sight of the big picture. ... One of the things we offered each other support on when we started with cooperative groups, was remembering that just because it didn't work with one group but it did work with the other thirty five, maybe we better not write this off. (Prof Exp 2B, 11)

The conceptions of teaching, the instructional skills, and the problem-solving attitude developed during Phase VI of Karen's career were evident to the researcher throughout the study. A detailed description of how the knowledge and beliefs developed throughout Karen's career have influenced her teaching is the subject of the next chapter.

## Notes

[1] Interview data is identified by the category of interview cited (i.e., Prof Exp = Professional Experience Interview; Before, During, and After = Before

Unit, During Unit, and After Unit Interviews respectively; and, Course = Course Interviews), the number of the interview and the tape (i.e., within categories interviews were numbered sequentially as they occurred, and, if more than one tape was used at a given interview, the tapes were labeled A, B, and C in sequential order), and the page number of the interview on which the cite appears.

# CHAPTER 5

# TEACHING HISTORY:

# TRANSFORMATIONS OF CONTENT

> "Shaping classroom practice - deciding what to teach and how to teach it - is the stuff of the teaching profession. Teachers make these decisions daily by selecting content, texts and materials, modes of presentation, learning activities, and evaluation methods to construct classroom curriculum. The autonomy associated with these choices characterizes our conception of teachers as professionals" (Hawthorne, 1992, p.1).

In this chapter I present a description of how Karen shapes US History instruction in her classroom, and attempt to elucidate the factors that underlie her practice. This description is based on my observation of a unit involving twenty lessons in both fourth and fifth period, plus two days of observation in later units, and, interviews with Karen conducted before, during, and after the observed unit. The literature on social studies reforms, teachers' pedagogical reasoning, and teachers' knowledge bases directed data collection and analysis. Specifically, I was interested in the way Karen transformed the content of US History for her learners, and the ways in which her knowledge and beliefs about subject matter, learning, and teaching had influenced these decisions.

I introduce this chapter with brief descriptions of Karen's classroom, the course, and the observed unit. These are followed by a vignette of a typical

lesson which provides the background for a description of the instructional events in Karen's class. In the final section of the chapter I describe three specific features of Karen's practice and discuss the knowledge bases that seem to support each.

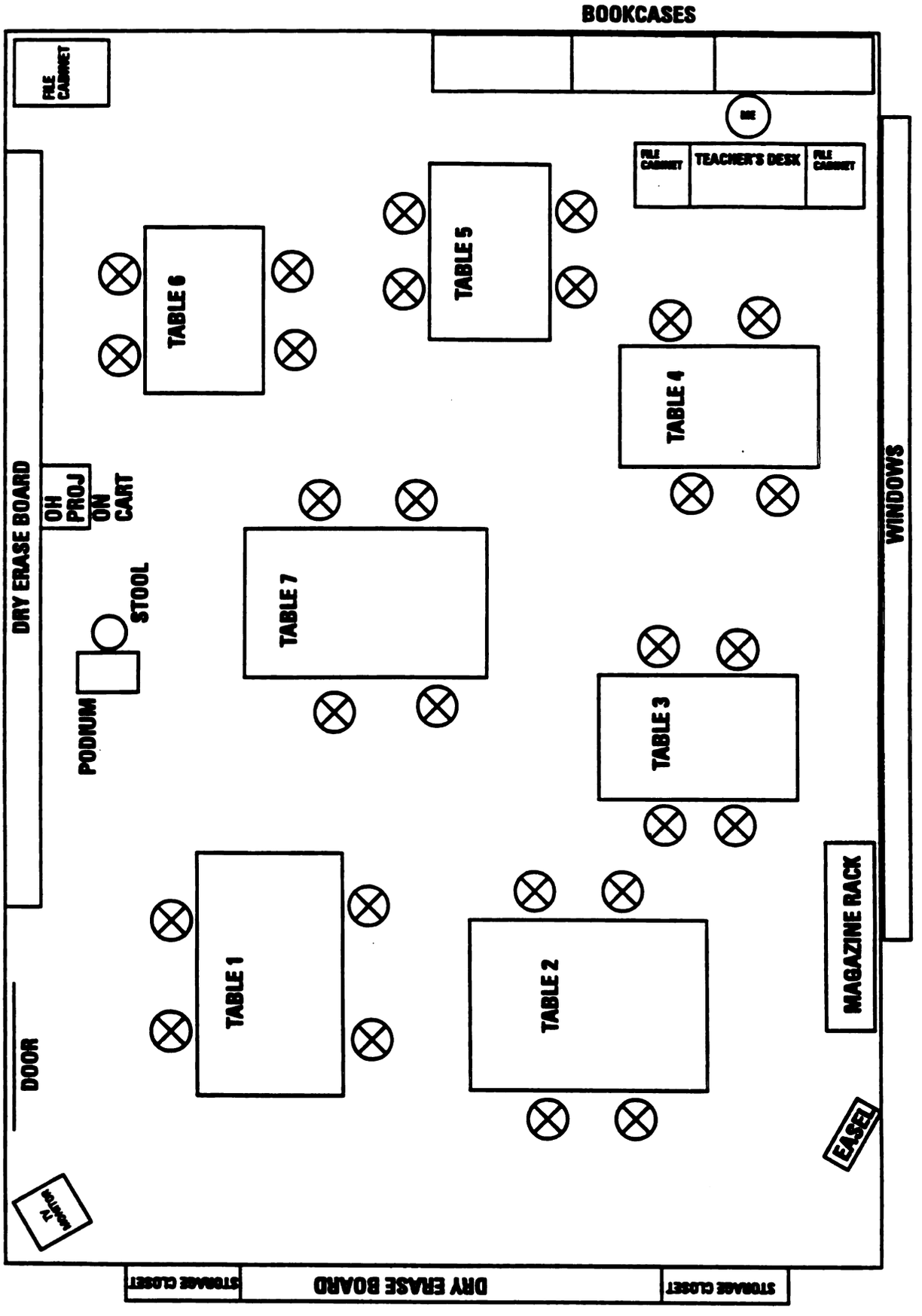
## Karen's Classroom

Thomas Jefferson Middle School is a brick building that sprawls along an entire block. Two additions have been added onto the building since it was originally constructed in 1957. The inside structure is fairly traditional with rows of square classrooms on either side of each hallway. The library is a large, fairly-open space with a computer lab in one corner.

Most of the teachers in Karen's building remain in the same classroom throughout the day and are not sharing rooms with other teachers. In general, the rooms tend to be a little more decorative and have more materials and storage in them than in buildings in which teachers float between classrooms. Like the other rooms in the building, Karen's room (Figure 5) has a linoleum-tile floor, concrete walls and a high ceiling. Acoustical tile was installed on the second floor the summer before the study, partly in response to a request from Karen because of the noise level in her room. There are seven tables in the room, each with four chairs. The west wall, the front of the room, has a door to the hallway in the south corner, and most of the rest of the wall is a dry marker board with a screen bolted to the top of one section. Directly in front of the board is a traditional student desk, on which Karen has various papers and containers with hanging folders. In front of the desk is a podium, and next to the desk, also pushed up to the board, is an overhead projector on a cart.

The east wall has a row of windows that begin about four feet up. In the

Figure 5 - Layout of Karen's Classroom


BOOKCASES
FILE CABINET
MIC
FILE CABINET
TEACHER'S DESK
FILE CABINET
TABLE 6
TABLE 5
TABLE 4
DRY ERASE BOARD
OH PROJ ON CART
STOOL
TABLE 7
PODIUM
TABLE 3
WINDOWS
TABLE 1
TABLE 2
MAGAZINE RACK
DOOR
EASEL
TV MONITOR
STORAGE CLOSET
DRY ERASE BOARD
STORAGE CLOSET

southeast corner is an easel with a dry marker surface. Next to the easel, along one end of the wall, is a display rack for magazines which includes several different issues of *Time*, *Newsweek* and *US News and World Report*.

The north wall has three floor-to-ceiling bookcases containing a set of textbooks and different types of printed reference materials, such as almanacs, atlases, and so forth, many in sets of seven. Karen's desk is in front of two of those bookcases, facing south. There is a bulletin board on the north wall with a timeline of events related to the Revolutionary War, and a two-drawer file cabinet in the northwest corner.

Along the south wall are two single-door closets, one in each corner, and another dry marker board in between the closet doors. On this board Karen has posted various papers, for example, the school schedule, the course schedule, progress sheets which list students' completion of assignments, and so forth. Above the dry marker board, and continuing around onto the west wall, are twelve sheets of red paper on which Karen has printed on the computer the following information:

INTELLIGENT BEHAVIOR Adapted from Arthur Costa
LEARN FROM EXPERIENCE Make mental connections. Create mental files.
QUESTION Why? How? What if..? Look for things that don't fit.
USE ALL OF YOUR SENSES Sight Sound Taste Touch Movement Smell
BE FLEXIBLE Seek alternatives. Respect other points of view. Compromise.
CHECK FOR ACCURACY Evaluate your work. Do the best you can. Try to say exactly what you mean.
BE PRECISE Use descriptive words. Identify subjects. Use complete sentences.
METACOGITATE Be aware of your thinking. Control your thoughts.
DELIBERATE Gather information. Reflect. Test your understanding.
THINK before you speak.
LISTEN with understanding and empathy. Paraphrase, clarify & give examples.

PERSIST Analyze. Plan. Figure it out. DON'T GIVE UP!

## The US History Course

A scope and sequence document was designed by Karen, Laurie, and another history teacher in the building eight years before the study. Karen revised the document from year to year, but the framework remained quite consistent. Although Karen had not revised the document during the study year (she had decided not to distribute it to students any more in favor of monthly calendars), it still reflected Karen's general approach to the course with the exception that she had decided to add two units and make other units smaller (see Appendix B). Operating within the colonization to Civil War parameter for the course stipulated by the district, Karen's year-long course addressed nine unit themes: opportunity, dependence, revolution, independence, nationalism, change, expansion, division and conflict. Key concepts and generalizations for each unit theme were identified in the scope and sequence document. For example, the unit on colonization included the key concept, geography, and two generalizations for this concept: Geographic conditions varied among the English colonies, and, Geographic characteristics influenced the economic choices that colonists made. The unit on nationalism included the concept, political parties, and two generalizations for this concept, Americans disagreed abut how to interpret the Constitution, and, Conflict developed over the relationship between the states and the nation.

## Overview of the Observed Lessons

The observed unit, Change, examined the Industrial Revolution, and lasted for twenty days (Figure 6). Day 1 was a quick introduction to the concept of change, as the students were also correcting their tests from the previous unit.

| Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|
| **DAY 1**<br><br>Test Corrections<br>Mini-Lecture about Change<br>Reading about 'James' | **DAY 2**<br><br>Check Notes/Questions<br>Overhead on Technology<br>Starting a Textile Mill<br>Bio Sketch of Slater | **DAY 3**<br><br>Mini-Lecture on Infrastructure<br>Different Modes of Transportation | **No School** | **No School** |
| **No School** | **DAY 4**<br><br>Check Notes/Questions<br>Group Note taking from Atlas<br>Cotton Mill Description Journal | **DAY 5**<br><br>Review Notes for Cotton<br>Mini-Lecture on Cotton Production<br>Cotton is King Worksheet<br>Discussion of Graphs and Reasons | **DAY 6**<br><br>Quiz<br>Mini-Lecture on Factors Affecting Profit<br>Worksheet on Growth of American Industry<br>Hamilton's Vision Journal | **DAY 7**<br><br>Quiz Corrections<br>Check Notes/Questions<br>Sectionalism Map<br>Discussion of Sections<br>Sectional Interests Journal |
| **DAY 8**<br><br>Review of Transportation Worksheet (Day 3)<br>Mini-Lecture on Transportation Routes<br>Map Activity of Major Routes<br>Transportation Routes Journal | **DAY 9**<br><br>Check Notes/Questions<br>Mini-Lecture on Democracy Continuum<br>Understanding Democracy Worksheet<br>Discussion of What makes a Country Democratic | **DAY 10**<br><br>Mini-Lecture on Using a Database<br>Using the Database Worksheet | **DAY 11**<br><br>US Elections 1824-1840 Database Map Worksheets | **DAY 12**<br><br>Day 11 continued |

Figure 6 - Unit Chart of Daily Lessons

| Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|
| **DAY 13** | **DAY 14** | **DAY 15** | **DAY 16** | **DAY 17** |
| Check Notes/Questions<br>Democracy in the US 1824-1840 Worksheet | Check Notes/Questions<br>Review of Democracy Worksheet (Day 13)<br>Sectional Interests Worksheet<br>Changes in Democracy Journal | Protective Tariff Video and Worksheet<br>Discussion of Tariff<br>Quiz<br>Political Cartoon Journal | Jackson Duel Reading<br>Review of Quiz and Note-taking<br>Sectionalism Review Worksheet | Check Notes/Questions<br>Political Parties Venn Diagram |

| DAY 18 | DAY 19 | DAY 20 |
|---|---|---|
| Quiz<br>What If Worksheet on Jackson and Whigs<br>1832 Election Journal | Finish What If Worksheet<br>Discussion of Worksheet<br>Review of Quiz<br>Presidents Journal | Group Test |

Figure 6 continued - Unit Chart of Daily Lessons

Days 2-6 focused on changes in manufacturing, farming, and transportation. Days 7 and 8 were spent on map work introducing the idea of sectionalism. Days 9-13 focused on changes in democracy and included 3 days in the computer lab. Days 14-16 connected sectionalism to specific political issues. Days 17-19 were focused on the political parties. The test was on Day 20. The other two observed lessons occurred in the next two units: the first lesson was toward the end of the unit, Expansion, and was a debate about the War with Mexico; and the second lesson was at the beginning of the unit, Division, and was a worksheet addressing conceptions about slavery.

## A Typical Lesson

To illustrate what a complete lesson typically looked like in Karen's room, I chose the lesson she referred to as "The Growth of Industry." This lesson occurred on Day 6 in the unit in period four. It demonstrates some of the different types of activities that Karen includes in her lessons and also shows the basic structure of her lessons.

*The Growth of Industry Lesson*

***Karen is a small-framed woman with short, graying hair in her early-fifties. She dresses comfortably on this day wearing slacks and a school sweatshirt with a school pin on her turtleneck collar. Students are in the room talking quietly before class.***

T: We're ready to start today with a quiz. Take out your pencils and turn to your notes.

10:43 *The bell rings.*

T: Remember, there will be a 5 minute time limit. Look up only the answers you are unsure about.

***Giving students a little more advice about how best to use their time, Karen distributes quizzes to each table. There are two forms of the quiz, Changes in Manufacturing and Farming; one is on yellow paper, the other on white (see Appendix C). Students start to work on the quizzes right away. Karen looks around the room at the tables and records the one absent student onto the attendance sheet which she places on the outside of the classroom door. The room is quiet except for the flipping of pages in the students' notebooks and occasional coughing from Karen and a few students.***

10:48 *Karen passes out scantron sheets to each table.*
T: The answer sheet is in the center of the table. Please record the color of your quiz on the subject line.

*After a short period of time, Karen reminds students about having their name and quiz color on their answer sheets. She asks if someone at each table would separate the quizzes and answer sheets, and she picks them up quickly as she makes a circle around the room.*
T: Before we go on with today's lesson, Indira and Bill, do you want to talk about the one you were arguing about yesterday?

*The two students tell Karen that they figured it out. She asks if they came to an agreement and they say yes. Karen changes her position to the southeast corner of the room near the dry marker easel.*
10:53 T: I'm going to ask all of you to direct your attention to the chart back here.

*Karen has drawn the following on the chart before class:*

| | GB | US |
|---|---|---|
| Resources | - | + |
| Labor | + | - |
| Capital | + | - |
| Enterprise | + | - |

*Karen reminds students that they compared Jefferson's and Hamilton's visions for the US in the last unit. She reviews those visions with a few volunteering students.*
T: If you look at this chart you can understand somewhat why Jefferson said that the US should stay a nation of small farmers. What I've listed here are what economists call the four factors of production. You need something from each of these categories to produce anything, no matter what it is. Whether you're talking about something as simple as making candles at home, or a factory that's going to manufacture a complex computer. You're always going to need some of each of these things.

*Karen then addresses each category, defines it, and gives examples. She defines enterprise as skill and knowledge and gives Slater, whose biographical sketch she read the previous week, as an example of someone who brought needed enterprise to the US.*
T: If you're running a factory, how plentiful these things are is going to determine how much you have to pay for them. If you have lots of something, what's that going to do to its price?
Several Sts: Make it low.
T: But if it's scarce then it's going to become more expensive.

*Karen then describes how plentiful each factor of production was in Great Britain at the time.*
T: Because these three things *(pointing to the last three categories)*, they're plentiful, they're going to be relatively inexpensive in Great Britain.

*Then she contrasts this with the situation in the US explaining why resources were plentiful but labor, capital and enterprise were scarce.*
T: Slater's enterprise was so valuable that Moses Brown offered him a partnership in the factory without putting up a dime. All Slater had to do was build the machine. That's not very usual that you an get a partnership in a business with no money. Slater invested his enterprise.

*Karen then moves the discussion to the consumer side.*

T: What does this mean in practical terms? You could produce the same item in the United States and in order to be profitable you would have to charge a higher price for it than the same item made in Great Britain even though it had to be shipped across 3,000 miles of ocean. Let's put this in concrete terms.

*Karen gives an example of selling a bolt of cloth made in Great Britain for $8 and making a profit, versus selling a bolt of cloth made in the United States for $9 in order to make a profit. She connects this situation to what happens when you go to a store and see two sweatshirts that seem identical but the expensive one was made in the US and the inexpensive one was made in Taiwan. She suggests that the cost of the item may reflect the different cost of labor in the two countries. She notes that while most people would buy the inexpensive sweatshirt, there are some people, her mother in particular, who would probably buy the one with the Made in America label.*

11:03 T: The United States, then, had some barriers, some economic realities to deal with. Obviously we did begin to industrialize. You've seen in your reading that the process did get started. Today, we're going to figure out some of the how's and why's.

*Karen reviews the worksheet directions with the students as she passes out the papers to each table, reminding them that people who started the factories expected to make a profit. She tells them the assignment is to determine which of the twenty listed characteristics would encourage manufacturing by making it more profitable, through a lower cost or an expanded market, and which would discourage manufacturing, and she emphasizes that they must explain the choice (see Appendix D).*

T: I don't have an answer key for this. I'm interested in you thinking like a businessman, like an economist. I'm much more interested in the reason you put down than whether you put a plus or a minus. I will collect one paper to see what you came up with. Let's take a look at the first one. Abundant land. Is it going to encourage or discourage. I think you could argue either way. That made resources plentiful which would keep costs from getting more expensive. But if it were up to me, I'd label it a minus. This is my personal opinion. Because land was abundant, it was too easy to farm, and people didn't want to work in factories so that kept labor prices high. You can put down whichever one makes most sense to you. Remember, it' a group assignment. You all need to contribute.

11:09 *The students get started on the activity right away. Occasionally, when students are writing, there are moments of quiet, but generally, the room is pretty noisy with student talk.*

*As students begin working, Karen asks a few students which color quiz they had because it's not written on their answer sheet. She then picks up her clipboard with the list of students in the class, and her journal notebook, and walks around between the tables.*

*I overhear a student at a nearby table say, "It's not just cotton that they need." And at another table, "But it could be a good thing because..." For the most part, Karen only listens to the students as she moves from group to group. She also may raise a point of view that the group might be missing to get them to consider it. For example, she asks, "Would tax-supported schools reduce the labor force?" thereby getting students to consider the role of child labor in*

*early industry. When asked a question, she usually squats next to the table so students are looking down at her, not up. The question is sometimes answered directly, and sometimes responded to with another question.*
11:23 *Karen asks the students sitting at the southwest corner of each table to turn in his or her paper. Then Karen ends the class with a brief writing assignment.*
T: Turn to your learning journal please. Why do you think Hamilton's vision is the one that has come true?

*Karen walks around and glances over students' shoulders as they write. After a few minutes Karen asks them to wrap it up and open their assignment books to write down the next day's reading assignment. As she finishes giving directions, the bell rings to end class.*

## Instructional Events

The Growth of Industry lesson demonstrates the fairly predictable pattern of instruction evident in almost all of Karen's lessons Identification of the most typical events in Karen's classroom will facilitate the description of the features of her social studies teaching, therefore, these events will be described briefly below and then referred to in the next section. If one thinks of a lesson as having a beginning, a middle, and an end, each of these phases was typically marked by specific instructional events in Karen's teaching (Table 1).

### Beginning of the Lesson

During the opening of the lesson, students would usually take a quiz, do quiz corrections, or have their notes checked while they reviewed them. On only six occasions in the unit did none of these occur at the beginning. The other instructional event in the opening phase of the lesson was the mini-lecture. This occurred in nine of the lessons in the unit.

#### Checking Notes/Student Questions and Teacher Responses

Once or twice a week (a total of seven times during the unit on change), students were required to bring in notes they took from specific sections of their textbook. These sections were identified in a written handout given to

Table 1 - Instructional Events

| Day | Check Notes/ Questions | Mini-Lecture | Focus Activity | Debriefing | Journal Writing | Quiz / Test |
|---|---|---|---|---|---|---|
| Unit VI 1 | | * | * | | | /*/ |
| 2 | * | * | (*) | | | |
| 3 | | * | (*) | | | |
| 4 | * | | (*) | | * | |
| 5 | | * | (*) | * | | |
| 6 | | * | (*) | | * | * |
| 7 | * | | (*) | * | * | /*/ |
| 8 | | * | (*) | * | * | |
| 9 | * | * | (*) | * | | |
| 10 | | * | * | | | |
| 11 | | | * | | | |
| 12 | | | * | | | |
| 13 | * | | (*) | | | |
| 14 | * | | (*) | * | * | |
| 15 | | | * | | * | * |
| 16 | | * | (*) | | | /*/ |
| 17 | * | | * | | | |
| 18 | | | (*) | | * | * |
| 19 | | | (*) | * | * | /*/ |
| 20 | | | | | | * |
| Unit VII 8 | | | (*) | | | |
| Unit VIII 2 | | * | (*) | * | | |

(*) activity was done in a small group
/*/ quizzes or tests were returned

students at the beginning of the unit. Students kept their notes in 3-ring binders that they brought to class each day, and they were able to use them while taking quizzes and completing other class activities.

On each of the days that notes were due, Karen began class by asking students to open their binders to their notes. Students were then asked to review their notes and think of a question. For example, the first day of the unit that notes were due, Karen began class this way:

> T: OK, a reminder. I want all of you to look at your notes and be prepared with at least one question you can ask when I'm done checking. Now your question can focus on something you don't understand or something that you're just curious about. I can't promise I can answer them but I'll try. (Day 4)

After giving directions, Karen walked around the tables and quickly initialed each page of students' notes. The initialing of notes is a procedure Karen and other teachers enlisted several years ago when they discovered students were passing notes between classes. Whenever a student did not have notes completed, Karen recorded this on her clipboard on which she had a list of the students in the class. After checking students' notes, Karen moved to the front of the room, usually sitting on the edge of her stool while leaning slightly on the podium, to hear students' questions. First she asked for volunteer questions and then she called on students. I don't know that students were aware of the pattern, but Karen would call on students in the same location at different tables (e.g., the student in the southwest corner at each table one day, the student in the northeast corner on another).

Quizzes and Quiz Corrections

The quizzes were tests of factual information from the textbook reading completed by students individually. (See Appendix C for sample quizzes.) For

example, the quiz that began the growth of industry lesson asked students whether the Industrial Revolution began in the United States or in Great Britain, whether textile mills were located in the Northeast, the South or the West, and whether the cotton gin was a machine which harvested cotton or cleaned cotton fiber. There was a five-minute time limit and students were always permitted to use their notes. As described in the growth of industry lesson, students recorded their answers on a small scantron card. The quizzes and the score cards were always returned the following day and students had the opportunity to make corrections, again using their notes, for which they received half-credit added to their score. That is, a 70% earned on the quiz followed by a 100% on the corrections would produce a score of 85%. Students who finished quiz corrections before the rest of the class could select a news magazine from the rack and read it at their seat.

Mini-Lectures

For about half the lessons in the unit, Karen provided students with fairly extended information to use in the upcoming activity. Mini-lectures were basically teacher monologues although students would sometimes be asked to answer questions which they would do either as a class or as individual students. These mini-lectures never lasted more then ten minutes and were frequently shorter.

**Middle of the Lesson**

The middle of the lesson was usually at least one-third of the class period and was the time students interacted with one another to complete a task. I refer to this as the focus activity to distinguish it from some of the shorter and more routine tasks in a lesson such as questions and quizzes.

Focus Activities

The focus activity was usually a paper worksheet and these were nearly always completed in groups composed of those students sitting at a table together. On two days in the unit, when students drew on laminated maps, individuals worked with the student next to him or her in a pair. When they were in the computer lab, students completed individual worksheets, but they informally assisted one another with no instruction from Karen. On one occasion, the students completed their worksheet as they watched a video, but also discussed it as a group when the video ended.

New groups were formed at the beginning of each unit. Karen distributed playing cards from 1 to 7 around the room (1 to 6 in the smaller period 5) and students were seated at tables by number with the black cards on one side and the red cards on the other. When the focus activity was a worksheet completed in the group, Karen usually collected only one copy, using the same location for all groups. (See Appendix D for samples of focus activities.)

**End of the Lesson**

The end of the lesson might involve a recitation in which the focus activity was debriefed, or an independent writing activity. On nine occasions during the unit the lesson ended with the focus activity; twice because the activity continued to the next day.

Debriefing/recitation. On seven occasions Karen brought the students back together as a whole class after working on the focus activity in their groups. As indicated, the debriefing usually had a recitation format with Karen asking for students to answer questions related to the activity. On two occasions Karen debriefed an activity from a previous class and shared information that

she found on the worksheets she had collected. In these instances there was more of a monologue than a back and forth between Karen and the students.

Journal Writing. At the end of eight lessons Karen asked the students to write in their journals. The journals were merely sheets of loose leaf paper in a particular section of their binder. Karen would use the journal either as an opportunity for students to present a personal reaction or opinion to some aspect of the information from class, or as a task that focused on the organization of the information from the class.

**Other Events**

There are two areas of Karen's teaching that are not directly addressed by these categories of instructional events, both related to classroom management. One is the record-keeping that is a daily part of Karen's classroom activity. This occurred at different times throughout the lesson, while students were taking or correcting a quiz, while students were working on a group activity or writing a journal entry, and so forth. Basically, Karen takes advantage of whatever class time she can to correct students' work and record grades. She is also evaluating and recording student participation during the lesson.

The other area of Karen's teaching that is not captured in the categories of instructional events is time spent managing student behavior. This appears to be a significant aspect of teacher behavior only in period five. Such management and discipline behaviors on Karen's part are almost nonexistent in period four. This aspect of Karen's teaching is addressed when discussing the differences between the two periods in the next chapter.

## Salient Features of Karen's Teaching

As described in chapter three, during and after each of my observations, I made comments, informed by the literature in social studies instruction, about what I saw during that day's lesson in the two periods. I also interviewed Karen about her lessons each week throughout the unit. At the completion of the study I used my field notes and comments from observations, and the language used by Karen in interviews, to generate a list of categories for describing Karen's approach to teaching history. I attempted to identify categories that seemed significant, that is, captured the essential nature of Karen's teaching, and related in some way to the recommended reforms in social studies. I read and reread observation field notes and interview transcripts paying close attention to information that did not fit the categories to decide if that was important enough for another category, or if it represented contradictory information that needed to be included. Based on this analysis of my observational and interview data I have identified three salient features of Karen's teaching: addressing relationships and patterns, making concepts concrete, and facilitating active processing of information (Table 2). I will examine of these in turn, summarizing the evidence I found in the lessons and in the interviews, and connecting these features to Karen's knowledge and beliefs about subject matter, learning, and teaching.

### Addressing Relationships and Patterns

While only one unit in the second semester of US History was observed, Karen was interviewed about her entire year-long course. The transcript from the course interview, which was conducted with Karen prior to any observing in the classroom, indicates a great deal of attention to relationships and patterns at

Table 2 - Features of Karen's US History Instruction

| Addressing Relationships and Patterns | Making Concepts Concrete | Facilitating Students' Active Processing of Content |
|---|---|---|
| • relationships between concepts within a lesson<br>• relationships between concepts across lessons<br>• relationships that define the unit<br>• relationships between units | • visual images<br>• descriptions and details<br>• examples and analogies | • expectations and grading<br>• focus activities<br>• student interaction<br>• explicit talk about learning strategies |

the course level. For example, when asked about the major ideas in her course, Karen referred to the organizing framework of the scope and sequence document:

> I guess I tend to think of it in terms of the way in which we did our scope and sequence which is partially a question of time, breaking it up into periods of time but it's also a thematic approach. We start with colonization and we focus on the period of how the colonies were started. This year I took the second unit which was Revolution and split it into two parts and taught the first part, which I called Dependence. I focused on the colonial period, after the colonies were established but the period leading up to the Revolution, and examined the relationship between the colonies and Britain, and then did Revolution. Then we took Independence which involved setting up a government and dealing with the problems of independence. That's broad, that included the Articles of Confederation, and the Constitutional Convention. Now, we're focusing on nationalism which I have defined for the kids as creating a sense of loyalty to the nation and for getting that government up and running and the things that would tend to pull people together and create an awareness of being part of a nation as opposed to a group of individual states. (Course B, 7)

In explaining the unit on change which I was going to be observing, Karen connected the topics and ideas in the unit to previous units and upcoming units:

> Well, what I want them to come out of the unit with is an understanding of the changes. We've spent a lot of time this year developing generalizations about the colonies and the regions that were colonies and so on. And I made a big point that things did not change very much from one generation to another, that lifestyles stayed the same. And here's really where the process of change begins. So we will be focusing a lot on changes in industry and transportation and farming. (Before A, 3)

> In the next unit on expansion we'll look at the changes in population. ... I want them to know those regional population patterns because they are important trends in American History and I'm going to introduce them a little bit to demographics because as we get into the Civil War, I think it was those population patterns that were certainly one of the big factors that influenced everybody. So that's a very important part of the unit on change is that I'm laying the groundwork for what's going to come later when we go into other topics. (Before, 7)

Finally, in describing her goals for the change unit, Karen identified specific ideas about democracy, and discussed how this might be a stronger emphasis

than in the past because of the students' apparent interest in politics, also a connection to previous units:

> I think I'm going to change my focus from other years a little bit. I've always focused quite a bit on the shift to manufacturing, changes in transportation, growth of democracy and demographics, shifts in population. This year I'm really going to put a lot of emphasis on focusing on democracy because we've been focusing in this current unit on the two political parties and I've also had the kids do a Venn diagram of Clinton and Gingrich because they've been interested in that. (Course 1A, 7)

The language connoting connections between concepts and ideas in these excerpts is significant. Words like generalizations, patterns, trends, problems, time periods, groundwork, factors, shifts, and so forth suggest that Karen wants to emphasize to her students how events influence one another. In another statement about the unit on change, Karen indicates that she, herself, sees even broader connections than she might be able to teach:

> I guess what I'm playing with in my head... I'm not sure how I'm going to do this but a big thrust of this unit is Jacksonian democracy and the changes that took place and the methods of selecting candidates and of electing a president - just the whole expansion of the right to vote. What I want to try and do is get the kids looking at politics and economics as being related and in a sense can we say that the changes in industry ... Oh, how can I say this. In my own mind, I see capitalism as being very closely related, as being the most democratic economic system. And I mean that in a sense that unlike any other system, it is the people who make the choices. And it is through those choices, that's what drives the economy. And that we're, more than any other country in history, we have tied those two things together. Just like democracy is not perfect, neither is capitalism. (Before A, 4)

For the unit on change, the following key concepts and generalizations were listed in the scope and sequence document, although Karen noted that population change would now be emphasized in the next unit on expansion (Figure 7). Certainly, these ideas and relationships were evident across many of Karen's interview comments. They were also evident in her daily instruction.

| | |
|---|---|
| INDUSTRIAL REVOLUTION | Loss of trade during the War of 1812 caused the growth of manufacturing in the United States.<br>New technology led to the creation of new industries.<br>New technology caused changes in methods of transportation.<br>New technology brought changes in farming techniques. |

| | |
|---|---|
| DEMOCRACY | Western states tended to allow more people to participate in government than the original states.<br>New ways developed for people to influence the selection of leaders. |

| | |
|---|---|
| POPULATION CHANGE | A very high birthrate and immigration caused the US population to grow rapidly.<br>The creation of new industries and related jobs caused the urban population to grow more rapidly than the rural population. |

| | |
|---|---|
| SECTIONALISM | Changes in the economy created political tensions between regions of the United States.<br>Population shifts affected the political divisions in Congress. |

Figure 7 - Unit Concepts and Generalizations

Most significantly, relationships were addressed in Karen's explanations and in the worksheets she used. Within each individual lesson Karen usually addressed a relationship between specific concepts in that lesson. Across several lessons, Karen addressed a larger generalization for the unit. Toward the end of the unit, Karen emphasized a major theme that encompassed the entire unit. Throughout her lessons, Karen made connections back to previous units and toward future ones. Examples of Karen's focus on these different types of relationships follow.

Relationships Between Concepts Within a Lesson

In the mini-lecture part of the growth of industry lesson described above, Karen clearly focused her language on describing the relationship between the availability of the four factors of production and an industry's profit:

> T: If you're running a factory, how plentiful these things are [resources, labor, capital, and enterprise] is going to determine how much you have to pay for them. If you have lots of something, what's that going to do to its price?
> Several Sts: Make it low.
> T: But if it's scarce then it's going to become more expensive.
> *Karen then describes how plentiful each factor of production was in Great Britain at the time.*
> T: Because these three things *(pointing to the last three categories)*, they're plentiful, they're going to be relatively inexpensive in Great Britain.

After contrasting the situation in the United States, Karen drew the following conclusion for the students:

> T: What does this mean in practical terms? You could produce the same item in the United States and in order to be profitable you would have to charge a higher price for it than the same item made in Great Britain even though it had to be shipped across 3,000 miles of ocean.

In another lesson, as part of a mini-lecture leading up to a focus activity that asked students to compare different modes of transportation, Karen developed some of the cause and effect relationships that resulted in the need for changes in transportation:

> T: If you were going to build factories, what was the power source for the first factories?
> St: Water
> T: What kind of water, just any water?
> St: Flowing water
> T: Most water flows unless it's in a stagnant pond. It has to be fast flowing water.
> *Back and forth question and answer with students about waterfalls.*
> T: Lots of force. Electricity is not on the scene yet. People haven't figured out how to harness it. When we talk about water power we're talking about fast moving water hitting a water wheel. It has to turn it fast enough to turn the gears inside the factory. Where are those

waterfalls? What region of the country has fast flowing rivers to power the factory.
St: New York.
T: Not really.
St: New England.
*Karen returns to student who attempted the first response and explains that New York didn't have much in the way of fast flowing rivers.*
T: We're talking about the far northeast and particularly New England. That's where it's going to make sense to build a factory. But where did the fiber for those factories come from?
St: The south
T: South, that's where they grew the cotton. And cotton was the fiber that worked best in the early machines. So we have cotton in the south and factories in the northeast. What do we need, folks? (Day 3)

In the "cotton is king" lesson Karen introduced the day's activity with a monologue that placed the topic in a context of cause and effect relationships, and reinforced ideas from previous lessons:

T: One of the changes that your book describes under farming, although I'll point out to you it wasn't just a change in farming, but it's a much more widespread change, is the growth in specialization. One of the things that begins to change as a result of the Industrial Revolution is that people begin to specialize. And instead of each family producing everything that it needs for itself, you start to specialize. Some people go to work in factories, some people work in bookkeeping, some people work in farming, ands they use money in exchange for services. That is a **major change** that we're looking at in this unit. Of course, what made it all possible was the development of transportation networks. We're going to focus today on one type of specialization and that is the growing of cotton. (Day 5)

The small group activity on this day required students to create two line graphs from two tables of data and to interpret their lines (see Appendix D). In debriefing this worksheet, Karen focused students' attention on what the lines told them:

T: Just look at you graph on the front. In Part II I'm asking you to describe the patterns you see in growth. Look at cotton production first. How can you describe the growth in cotton production in the United States? Linda, just what do you see there in cotton production?
St: The last one takes a big jump.
T: OK, between 1850 and 1860. Do you see anything else that stands out in the pattern?

St: It's increasing fast.
T: Yes, going up faster. Each of these vertical lines represent ten years apart. So if it's a real steep line we can say it had rapid growth. If it's a very gentle slope, then it was less growth. The biggest jump is in the decade of the 50's. How would you describe the growth between 1790 and 1800? Troy, what's it look like to you?
St: It's not that much .
T: Pretty slow isn't it? Very, very gentle slope. Where do you see the first increase in the rate of growth?
St: Between 1820 and 1830.
T: OK. And then the next big jump would be in the 1850's. Would you agree with that?
St: Yeah.
T: Now we've got a pattern. It's growing slowly until the 1820's when it grows more rapidly, then it takes a big jump after 1850. That's a pattern; it's a trend that you need to remember. (Day 5)

After soliciting a few more observations on the graph, Karen led the students in a discussion about why some specific changes might have occurred, focusing them on cause and effect relationships. After students guessed at a number of answers to one of Karen's questions, each response being explained by Karen as to why it wouldn't account for the relationship in the graph, she reminded the students to consider information from a previous unit:

T: Anybody give me a reason why that before 1820 we don't see a big growth in cotton production? What did you study in the last unit that would have kept down the sale of cotton?
St: The embargo.
T: Yes, what's the point in growing cotton if it's going to sit and rot in the harbor. Anything else?
St: The war with Britain.
T: Precisely, we were at war with Britain. You don't do business with your enemy during wartime. When you look at this graph, be able to relate the things you've studied to the patterns on the graph. The embargo and the war would interfere with getting cotton to market. (Day 5)

It was very common for a particular relationship to be highlighted within a mini-lecture, focus activity, and/or debriefing. There was also a noticeable pattern of building a generalization around several days of instruction.

Relationships Across Lessons Within a Unit

During the unit on change, as described in the overview of the unit, lessons were somewhat clustered and these groupings lent themselves to specific generalizations related to the Industrial Revolution, changes in democracy, and sectionalism. The focus activity for the "growth in industry" lesson pulled together readings and activities from several lessons that dealt with the changes in farming, transportation, and manufacturing. On the worksheet Karen listed the events and conditions discussed in earlier lessons, such as the construction of the Erie Canal, the invention of the cotton gin, and increased commercial farming, and asks students to decide if the characteristic would encourage or discourage industry in the United States.

Another major theme in the unit concerned the changes that took place that increased democracy in the United States during the period under study. After three days in the computer lab exploring a database of voting qualifications for presidential elections between 1824 to 1840, students used the maps they filled in while in the lab, to determine the accuracy of a series of statements (see Appendix D). For example, they were asked if more Americans were able to participate in electing the president in 1832 than in 1828, if all of the property ownership requirements for voting disappeared after the election of 1836, if the voting qualifications in Pennsylvania became more restrictive after the election of 1836, and so forth. While debriefing this worksheet the following day, Nancy asked students to take a look at the statement about Pennsylvania:

> This one is here because it is the one exception to the trend. ... I think by 1840 we have a clear pattern. Look at your maps. The states are becoming less restrictive and the west is more democratic than the east. (Day 14)

These generalizations about the spread of democracy during the period emerged after more than four days of classes exploring the concept of democracy and using the database to identify particular state's voting qualifications.

Relationships that Define the Unit

Toward the end of the unit on change Karen created several activities and provided several explanations that highlighted the major theme of the unit: the effects of the changes that took place during the mid-1800's. For example, in an introduction to the worksheet for the "sectional interests" lesson, Karen offered the following explanation with students voluntarily calling out answers to her questions:

> T: The country began to divide because of all the changes. This is a result of all these changes we've been discussing. When we studied changes in manufacturing, where was it? ... We also looked at changes in farming. Which region of the country specialized in wheat and livestock? ... What was the primary activity of the South? ... Where was the main market for their cotton? ... This is a key understanding. Because these regions had different economic interests, they had conflict. (Day 14)

Karen drew together the 13 previous lessons and focused on the main ideas for the remaining lessons which connected regional interests to political parties. In the focus activity for that day students were asked to complete a worksheet with a graphic organizer that included a matrix on which students identified whether a person from the Northeast, the South, and the West would support or oppose the protective tariff, road improvements, and states' rights (see Appendix D). For each regional position, the students had a column to provide an explanation. Through this activity Karen highlighted the connections between the economic and political interests in the different regions.

In explaining this activity in a "before" unit interview, Karen emphasized

the relationship across the unit that it was intended to address:

> There's a space limitation [on the worksheet] very intentionally because I want them to get what's the real nitty gritty. What I'm trying to do is pull together the changes in manufacturing, the changes in farming and the changes in democracy because they are all going to come together as we look at sectionalism. This activity was the transition into the organizer which they need to use to study for the test. There will be a whole section of the test on regional patterns. (Dur 3B, 15)

She reiterated on many occasions that her tests required students to use their understanding of patterns and trends, not rote memory of factual information:

> I gave them three very specific study strategies for the last test. ... Those things aren't explicated in the text. You could have memorized the whole chapter but if you haven't done the strategies you won't know some of the patterns you're being tested on. (Course 1B, 5)

Relationships Between Units

Karen regularly referred to content from previous units and attempted to emphasize what was similar and different in the current unit. For example, in the "growth of industry" lesson described above, Karen opened the lesson by referring back to some major concepts in the previous unit; specifically, she referred to the lessons in which she compared the differing views of Hamilton and Jefferson, and the relationship between their visions and their political actions. Earlier in the lesson Karen indicated that the differences between the two countries in terms of the factors of production made Jefferson's vision of the United States as a land of small farmers somewhat reasonable. In the journal writing for that lesson students were asked to come full circle and explain why Hamilton's vision, and not Jefferson's, is what occurred.

While Karen clearly incorporated connections to other units in her planning of lessons, students' questions frequently provided opportunities for drawing these relationships as well. In response to a student's question about the

textbook's description of a wheat belt, Karen's explanation reverted back to concepts from earlier units on the colonies:

> T: When they talk about the wheat belt they're talking about an area that specializes in growing wheat. Now, where the wheat belt is located is going to be in different places in different points in history. Today, the Red River Valley, well, part of the Red River Valley is part of the Durham wheat belt. There's another wheat belt across Kansas. And of course that wouldn't have been true of the period you're studying. In colonial times, remember we talked about the Middle Colonies as the bread colonies. Pennsylvania was your wheat belt in Colonial times. Now that's beginning to spread west. Where would you expect it to spread west to? What's west of PA?
> St: Ohio
> T: And who can picture their map? What's west of Ohio?
> St: Illinois
> T: Yes. That's going to become your wheat belt. Any idea why? What would make that area particularly good for growing wheat? (Pause) Any thoughts?
> *T gives hints, pauses, and responds to incorrect answers with factual information, e.g., "Yeah, but there are lots of places with fertile land."*
> T: You're talking about an area that's relatively flat or gentle rolling hills and the climate is good for growing wheat and grain crops. There's a market for it. That's what the farmers are used to growing. All of those things are going to enter in. (Day 4)

In the debriefing phase of a map lesson in which the students were asked to outline the states included in the Northeast, the South, and the West on their laminated maps, Karen asked students to share their boundary lines and to give reasons for their choices. While students shared their ideas and started to come to some agreements, Karen helped to clarify how these regions were different from what the students had encountered in previous units:

> T: Delaware used to be with the Middle States in the colonies. Now it's in the South as a slave state.

The examples of Karen's practice described above demonstrate that she addressed relationships and patterns at many different levels: within lessons, across lessons, across a unit, and across different units. This emphasis occurred in each type of instructional event.

**Knowledge Bases for Addressing Relationships and Patterns**

Observational data as well as interview data provide information about the nature of Karen's subject matter knowledge. Specifically, they seem to indicate that her knowledge is both differentiated and integrated (Wilson & Sykes, 1992). Her reference to the unit on change as laying the groundwork for student understanding of the variety of factors which led to the division in the country before the Civil War, seems a good example of differentiated knowledge. Indeed, on many occasions Karen easily discussed multiple dimensions of the topic under discussion. In addition, her continual focus on patterns and relationships suggest that her knowledge has the quality of integration. She is quite facile in discussing how events are tied together, and she makes these connections not only in prepared parts of her lesson such as the mini-lecture or focus activity, but in the impromptu answering of students' questions.

In the "before" and "during" unit interviews Karen spoke about the relationships she was hoping to get across to the students. In discussing these relationships, some of her comments reveal not only her beliefs about the subject matter, but her understandings about learning and her learners. She is consciously thinking about how to help students see relationships:

> If I'm going to look at it [the unit on change] in terms of these kids' lives, this is probably the single most significant thing that's happening - the changes that are coming about in our system because of economic changes. I'm looking for some ways to get the kids to see that. To see some comparison. So I'm feeling my way in a way. I think you know I see connections but I tend to see connections where nobody else does. I'm always doing that. So the problem is when I see those connections, how can I make them real to the kids? How can I stimulate some curiosity? (Before A, 4)

In explaining her use of the focus activity "sectional interests" which was described in a previous section, Karen revealed how she hoped the worksheet would prompt students' understanding of relationships:

> I've tried all year to get the kids to define an issue as a question about which people disagree. And so, there were several issues for which the answers fell into regional patterns. So they have a series of opinions here and they have to identify which section of the country the speaker is from and then use that to fill in this chart. How do they expect that region to answer, deal with that question [e.g., protective tariffs] and why? Can they see a connection with what they've learned about that region and why they would feel that way about that issue. What I am doing is creating a structure. I'm leading them. (Before B, 10)

It appears evident that Karen possesses extensive subject matter knowledge that allows her to see numerous connections between concepts in this unit and others. She also believes that she needs to structure activities in such a way as to make those relationships and patterns obvious and meaningful to her students.

The focus activities frequently provided an organizational framework for students. There were columns for advantages and disadvantages of modes of transportation, matrices to compare the economic interests of the three regions of the country, Venn diagrams to compare the similarities and differences of two political parties, and so forth. The use of such organizers is strongly influenced by Karen's' beliefs about the nature of learning:

> All of learning is a question of organization. ... When I give students a Venn diagram to organize information in history and their science teacher gives them a Venn diagram to organize information in science, it's the same strategy. This is not a history strategy; this is a learning, organizational, pattern-making strategy. (Course A, 3)

**Making Concepts Concrete**

Karen frequently spoke in interviews about the importance of students generating mental pictures:

> I've sort of some to the conclusion that they don't ever try to create mental pictures. So, one of the things you'll hear me talking about a lot is mental pictures. That you've got to create some pictures in your head because that's the only way you ever start to find out what doesn't make sense to you. (Dur 1, 7) One of the things that I'm trying to teach them to do through modeling and by creating expectations is that when you read, you should be picturing some thing in you head. I feel like these kids today have grown up so much with television that they don't even have to develop mental images for music. (Dur 2A, 7)

In analyzing Karen's instructional practice, I found many examples of making concepts concrete that included using visual images, using descriptions and details, and using examples and analogies. Each of these is illustrated below.

Visual Images

On several occasions Karen talked about how visual her students were. She commented once that she believed they got more out of a video sometimes than she did. During the unit on change she used photographs, video, maps, and graphic symbols to build meaning of concepts.

When students were completing a worksheet on comparing the advantages and disadvantages of different modes of transportation, Karen took a copy of their textbook from the shelf and walked around to the tables showing students the pictures of the canal boat. On another day when the reading assignment had been about changes in manufacturing, a student asked a question about the spinning jenny. Prepared to talk about the inventions in manufacturing on that day, Karen referred the class to the pictures in the *National Geographic Historical Atlas* on each table. She also showed a picture from the book I had shared with her on inventions in the *Eyewitness* series. As a matter of fact, she asked the librarian to order that book because she was impressed with all the pictures it contained.

During one lesson in the unit Karen showed a video in which actors depicted two cousins, one of whom was living in the South visiting his Northern relative. The two cousins shared the different regional perspectives on the protective tariff as they discussed what was going on in their lives.

Karen also had students create their own pictures by drawing on maps. During a lesson on changes in transportation the students worked in pairs and followed a set of directions to draw the major transportation routes in the country at the time. This activity provided a visual image of where the available roads began and ended, thereby revealing which regions of the country were connected and which were not.

In the computer lab assignment students manipulated a database that compared the voting qualifications in the states over five elections. Students completed a set of five maps, color coding each state based on its specific voting qualifications. Changes across the colored maps showed patterns in the growth of democracy. Karen explained this activity as she was developing it, and the focus on helping students 'picture' information is clear:

> If I'm going to tie it [the database] in, I've got to put it in a regional framework and that sooner or later means I've got to have them transfer that data to a map because that's the only way you can see the regional patterns. It isn't going to come across to these kids who think Vermont is over where Kentucky is unless they get it on the map and can see it.

Graphic symbols were used to make concepts concrete as well. For example, in the "growth of industry" lesson Karen used plus and minus symbols on the dry erase board to indicate whether Great Britain and the United States had an abundance or a small supply of each of the factors of production. These symbols were placed on the board as she explained each factor.

The "understanding democracy" lesson began with Karen drawing a continuum on the chalkboard:

> T: Democracy is an abstract concept. I'd like to suggest to you that pure democracy does not exist in the United States. Try to imagine 240 million people all agreeing to the same idea. The opposite would be totalitarian dictatorship. Orwell's *1984* envisions a totalitarian society in which the government spies on its citizens and every aspect of life is regulated.
> *Karen draws a continuum on the board with Totalitarian Dictatorship on the left end and Democracy on the right end.*
> T: The writers of the Constitution were trying to create a balanced republic. ... We were about here at the time of the Constitution.
> *Karen marks the continuum a little right of center.*
> T: Over time, the country became more democratic. It didn't happen at the same time in every state. Today we'll begin to look at what makes a state more or less democratic. (Day 9)

Descriptions and Details

Karen frequently provided students with descriptions and details of people, places, and events. On the first day of the unit she asked students to read a handout entitled "A Lifetime of Change":

> T: Today we're going to begin focusing on change. And I want to remind all of you that history is people. It's not just government and battles and things that often times are associated with history, it's people, and people's lives and how the events we're studying affect those lives. And to help you to visualize that, I'm going to ask you to complete a reading that tells you about one hypothetical person. ... This has been written just to illustrate to you the changes that could have happened within one person's lifetime. (Day 1)

Toward the end of the unit when the students were doing activities related to political parties, and were considering the different perspectives of the power and personality of President Jackson, Karen read a description of Andrew Jackson's duel with Alexander Hamilton. The narrative provided specific details about the reason for the disagreement between the men, the ritual of the duel, and the tragic results.

On other occasions Karen provided details from her own memory during different phases of the lesson. For example, in the "growth of industry" lesson, while describing the lack of enterprise or knowledge about manufacturing in the United States, Karen gave the students some additional information about Samuel Slater's experience:

> Samuel Slater's enterprise was so valuable that Moses Brown offered him a partnership without putting up a dime. All Slater had to do was build the machine. That's not very usual that you an get a partnership in a business with no money. (Day 6)

On another occasion, when debriefing the students' performance on the worksheet which compared different modes of transportation, Karen suggested to them that they could have been more thoughtful when considering advantages and disadvantages. She shared with the students a variety of details related to transportation during that time period: that wagons traveled over roads that were either dirt, crushed rock, or gravel; that Ohio passed a law that tree stumps of more than 2" couldn't be left in the road; that the Erie Canal was built almost completely by hand with shovels and axes; that cargo sometimes had to be unloaded from one railroad car and loaded onto another car because of different-sized tracks, and so forth. Through these details, Karen provided mental pictures of the conditions of transportation in the early 1800's.

After students had looked at pictures from the Industrial Revolution period in their *Historical Atlas*, and had been assigned a reading about changes in manufacturing in their textbook, Karen asked them to write a learning journal describing how a cotton mill looks, feels, and smells inside. In this activity she was asking students to produce their own mental pictures and details.

Examples and Analogies

Karen used a variety of approaches to provide students with examples of concepts. Sometimes she referred to ideas from previous lessons to make a point. For example, she had read a biographical sketch about Samuel Slater on Day 2 of the unit before she used him as an example of someone who had enterprise in the "growth of industry" lesson:

> The situation in the United States was exactly the opposite to Great Britain. We had land and minerals, but little knowledge about manufacturing. Enterprise is skill and knowledge. What Slater brought with him was knowledge. (Day 6)

Other examples came from making connections to students' lives. In the same "growth of industry" lesson, Karen related the explanation of cost and profit to an everyday shopping experience:

> The result of all this is that something made here would be more expensive than if it were made in Great Britain. Let's make it concrete. What do you do when confronted in the store with two choices? What if one sweatshirt cost $40 and was made in the USA and another one of equal quality was $20 and made somewhere else. Which one would you buy? ... At least most people would buy the least expensive one. My mother would probably buy the USA one. (Day 6)

Karen also referred to her personal experiences and tried to connect these to ideas that the students could understand. When introducing the idea of change in the beginning of the unit she discussed her experience with computers:

> T: Change in the 1800's happened very slowly. We're going to be studying the beginnings of the Industrial Revolution but the Industrial Revolution didn't really, wasn't really completed until after the Civil War which you'll be studying next year in 9th grade History. I'd like to suggest to you that in your lifetime our country has been going through changes that are affecting your lives every bit as much as the Industrial Revolution affected people's lives. The difference is it's happening in a span of only a few years instead of being spread out over many years. Let me give you an illustration, one that hit me this weekend as I was working on all of your grades.
> *(Karen describes to students how she began teaching grading by hand, then bought a calculator after teaching for 5 or 6 years for $99, and now*

*uses a computer. She describes the lengthy process of entering grades in a school-wide gradebook.)*
T: I never dreamed that one day I would have a computer at home and I could update grades every week and send home reports. (Day 1)

During a lesson in which Karen was explaining the role of the Erie Canal in terms of changing transportation, she alluded to a city that the students might be familiar with, Duluth:

> T: Albany's located on the Hudson River and so when the Erie Canal opened you had for the first time a way of connecting the great lakes and the Atlantic Ocean. Now today we rely very heavily on the St Lawrence Seaway which allows ocean going ships to enter the St Lawrence and go to the Great Lakes. And ultimately many of them dock in Duluth. The St Lawrence Seaway was built in the 20th century. I remember it was completed in my lifetime. It wasn't there in the 1800's. But I think we could say that the St Lawrence was modeled after the Erie Canal and does somewhat the same thing today that the Erie Canal did in the early 1800's. If you picture all the states that are located around the Great Lakes, it suddenly gave them an outlet to the Atlantic. (Day 4)

There were also occasions when Karen used the focus activity to provide examples of a concept. The worksheet for "understanding democracy" asked students to determine which statement in a pair was more democratic than the other:

> Presidential candidates are nominated by Congressional caucuses.
> Presidential candidates are nominated by political parties.
>
> Presidential electors are chosen at large.
> Presidential electors are chosen by districts. (Day 9)

Karen made the concept of democracy more concrete for students by asking them to evaluate examples of it. Her explanation for this activity, is based on her knowledge about her learners and her belief that knowing a definition is not understanding a concept:

> People govern themselves. That's the definition. Now we're going to apply it. We've got two different circumstances, which is more democratic? I've got to get them thinking about what do we mean by growth of democracy. How can democracy grow? They tend to see

> things, as democratic or it's not. So, I've got to help them see that it isn't black and white. (Before A, 10)

**Knowledge Bases for Making Concepts Concrete**

The instructional practice and activities described above, along with the excerpts from interviews, reveals more about the nature of Karen's subject matter knowledge. The data suggests that her historical knowledge also has the characteristic of elaboration as defined by Wilson and Sykes (1992). Karen's sharing of details about transpiration in the 1800's, and her reading of the description of Andrew Jackson's duel show this quality of deep knowledge. However, her decision to include such details in her instruction, as well as the other transformations of content described above, seems to come from her belief that students need to create mental pictures of different time periods, places and events if they are to understand them.

**Facilitating Students' Active Processing of Content**

The previous two sections have provided evidence that Karen's teaching emphasizes both the connections between the concepts she teaches and the meaning of those concepts, that is, beyond rote memorization of definitions. There is also evidence in the observational and interview data that there are specific characteristics of Karen's' practice intended to address how to help students actively process content in US History. Her communication about expectations and her system of grading, the nature of the focus activities, the use of small group work, and the occurrence of explicit talk about learning and study strategies, all seem directed at prompting students to be active learners.

Expectations and Grading

At the beginning of the semester Karen distributed an information sheet to the class. The following descriptions were on the sheet next to the heading Classroom Expectations:

> **PREPARATION:** Be on time. Have all necessary materials.
> **ORGANIZATION:** Keep your paper's accessible in your binder. Use your assignment book to plan ahead.
> **ATTENTION:** Focus on the lesson. Follow directions.
> **COOPERATION:** Participate actively in each lesson. Be respectful to each other.
> **REFLECTION:** Think. Review. Make Connections.
> **HOMEWORK:** Complete your reading and note-taking on time. Complete the weekly news games.

Karen emphasizes the importance of these classroom expectations by generating a process grade for each student. The process grade represents over 50% of a student's grade in each unit. Karen evaluated students daily, using a checklist for each class, noting whether necessary materials were brought to class, whether notes were ready, whether a question was offered when a students was called upon to share a question, whether a student was on-task during group work, and so forth. Essentially, if students came to class prepared, and participated actively, they received their full process points. The rationale for the prominence of these particular classroom behaviors in Karen's grading may be found in her comments about her major goals for the class:

> I think a very important part of what I want them to come out with is an awareness of their own thinking and learning, and an ability to become more productive learners. And certainly, what I'm teaching in this regard is as applicable in their other subjects as it is in history. (Course 1A, 6)

Another component of students' grades were their corrections of quiz items and test items. After each quiz and test was completed, Karen returned the corrected score sheet for students correct any inaccurate answers. The

corrected test score was averaged with the original score, thereby emphasizing the understanding of the content, not merely the grade.

Students were also asked to create a set of notes from an assigned textbook reading one or two times each week. They did not have textbooks at their tables during class unless they got one from the extra set in the book cases, or unless Karen placed them on the tables for a specific assignment. As Karen indicated in an interview, she intentionally keeps students from relying on their textbook for information for activities, and instead, encourages them to use their own notes:

> We've gone through sort of an evolution with this note-taking business. When we first started teaching notes, we taught a specific format and required everybody to follow that. And then we came to the realization that just wasn't working. Well, the more I got into thinking skills, the more I came to the realization that there isn't a wrong or a right way. It's got to be theirs. So, how do you help them learn to take better notes if you accept the premise that there is no single right way? Our answer to that was we've got to have them use the notes. Put the books away. (During 2A, 1)

In fact, as noted in the "growth of industry" lesson, students were encouraged to use their notes during their individual quizzes. Karen clearly did not expect students to keep all pieces of interesting factual information in their heads, but rather to process that information in the form of a set of notes so that the information would be accessible when doing other activities.

As described in the section of this chapter on instructional events, each time Karen checked students' notes, she asked them to think of a question. When explaining her use of question asking as an class activity, Karen made a distinction between students engaged in 'studenting' and students engaged in learning:

> That's [question asking] where learning starts. If you never ask any

> questions, you don't learn. These kids don't ask many questions ... Fourth period has too many kids who have been too successful for too many years. They are 'studenting,' not necessarily learning. There aren't a lot of good question askers in there. They are just beginning to get there. (Dur 3B, 19)

Karen's comments suggest that students who are 'studenting' are taking a more passive approach to their learning; an approach which has allowed them to do well in school, but perhaps, without conceptual understanding to show for it.

Focus Activities

Although many of the instructional events described in the previous sections on addressing relationships and patterns, and making concepts concrete, are obviously intended to help students process content, the focus activities seem overwhelmingly geared to generating active learning on the part of Karen's students. These activities required students to do more than fill-in-the-blanks with information read from the textbook:

> It's not a question of a right or a wrong answer. It's a question of getting the kids to talk with their ideas out in the open, share ideas, hear each other's thinking. And that's really where I'm trying to go with it, not that we're coming up with right answers but rather how do you see this? Can you defend it? Can you make a case for it? (Before 1A, 8)

For the unit on change students were asked to describe, compare and contrast, sequence, identify patterns, infer, predict, summarize, and verify, to mention a few of the thinking processes evident in the worksheet directions (see Appendix D). In a "before" unit interview Karen explained how the growth of industry worksheet was developed to help students understand the connections between different events they were studying. Her comment clearly shows her perception of the difference between passive and active learning:

> We used to accomplish somewhat the same thing by having the kids read other readings or by lecturing. Neither one proved to be terribly effective. Then one year, Laurie and I were saying, "Well, why don't we

> just take our list of things [various conditions present in the mid-1800's] and give it to the kids and have them evaluate it" [in terms of the possible effects on industry]. We did and it provoked marvelous discussion. The thing that excited us was the kids came up with some perceptions that we never thought of. Because, you are dealing with things that historians always say this is one of the things that led to this other thing; they *may* tell you the why but then it was just the kids memorizing some historians' views. What we figured out was the kids can make those connections for themselves. (Before 1B, 8)

Many of the focus activities asked students to make a judgment or respond to a statement that was provided rather than asking students to generate answers to questions. Karen sees this approach as a way to prompt students' processing of content by giving them a place to start:

> By and large they have a great deal of difficulty expressing what they do know. Put it in a context where they have to make a choice, it's easier for them. I think that somewhere down the road we have to d more to develop their ability to express themselves. To some degree, that's what I'm trying to get at with the learning journal. But I find often times kids can't put something down in their journals, but ask them a question or give them a choice and they can make the correct one which tells you there is some understanding there. They can defend it once you've given them a framework in which they have to choose. (After, 2)

Karen also supported her students in showing their understanding by encouraging student interaction through small group work on the focus activities.

<u>Student Interaction</u>

Karen clearly sees the focus activities as intellectual challenges for the students, and she believes the groups provide assistance in meeting that challenge:

> For a lot of the activities that we do, they require some higher level thinking. Left to their own devices, the kids won't even try. They need scaffolding. They need the support network of the other kids to even have the courage to try it. ... A second reason they are in a group is because their worst enemy is their impulsivity. They don't even read directions; they just look at the format. "Oh, this looks like matching," and they start putting answers down. When they are in a group there's

> usually someone who will say, "Now wait a minute. I don't think that's right." In the process of talking this through, they stop and reflect on what they've read. (Prof Exp 2A, 2)

Students interacted at their tables almost every day. The first day of the unit the class ended before students could work together on the handout they had read individually. The same thing happened on the day they watched the video on the protective tariff. For the three days in the computer lab students worked at individual computers, although they readily helped one another and they were never asked to work without talking. Actually, Karen had wanted the activity to be done in pairs, with one student manipulating the database and the other student generating the maps on the computer. However, there was no computer software available to create the map outlines. The only other class day there was no group work was near the end of the unit when Karen asked students to complete a review activity using their own notes.

Karen's belief in the important role of sharing and reflecting with others in the learning process is evident in her comments about two students who were doing their notes together:

> I have two kids who are doing the same notes, who are doing them together. To me, that's a plus because they are talking to each other and they are working together to decide what should be in the notes, and both are taking better notes as a result. (During 2A, 5)

Students in the class also took their end of unit tests in small groups. It should be noted that students had to have all their notes completed in order to take the test in a group. Each student was given a copy of the test, but the group had one scoring sheet. If a student disagreed with others in the group about a particular answer, that student could dissent and attach a sticky note to the answer form. Karen believes that she learns much more about what her

students know from listening to them take group tests than she did from having them take individual tests in silence:

> Since I've been giving tests in groups, when I listen to them while they are taking the test, I'm really listening for their thinking patterns and the misunderstandings and that gives me some clue about where I have to go. (Dur 1, 3)

In fact, she sees the test as not merely an assessment of what students know but as an actual instructional activity for them:

> The test is a learning experience. I think I am starting to get the kids a little bit away from seeing tests as evaluation and beginning to get them to see the test can be a very real learning process. It forces you to make some choices and to defend your choices and to give your reasons for them because you have to talk about it with somebody else. (Dur 3B, 11)

In addition to providing students with almost daily opportunities to talk about specific content in small groups, Karen also explicitly discussed learning strategies during different lessons throughout the unit.

Explicit Talk about Learning and Study Strategies

One way that Karen explicitly discussed learning strategies was sharing the ideas of Art Costa during the first weeks of school. Although these days were not observed for this study, the posters used by Karen to talk with students about learning and studying strategies remained around the room, as indicated in an earlier section of this chapter describing Karen's classroom. On a few occasions during the unit on change Karen referred to the posters, particularly when she wanted students to think about types of questions they could ask.

The interview data also indicates that teaching thinking skills is an important goal of Karen's. When describing what she would like her 8th graders to take away from her US History course, she focused on various learning and studying strategies:

> Our school as a middle school has really focused on developing, teaching, and providing explicit instruction in and reinforcement of specific study skills. And while there is a lot of variance in the ability that various teachers have to teach study skills, we are certainly creating an awareness and I think that perhaps one of the best things that I give my students is a sound grounding in reading, note taking, listening, organizing information, and developing some thinking paradigms. (Course 1A, 2)

In a few lessons in the unit Karen prompted students to examine the effectiveness of their own learning strategies. For example, after returning quizzes one day, she suggested to students that a number of them had missed one particular question that should have been addressed in their notes. She used this as an opportunity to share her own note-taking with students and to discuss the connection between thoughtful notes and answering quiz questions correctly:

> T: Number 1 on the yellow quiz which is number 12 on the white quiz was missed by over half of you.
> *This question reads: President Jackson enforced the Supreme Court's decision on the Indian Removal Act.*
> T: Who knows from your reading how they ruled?
> St: For the Indians.
> T: I would like you to turn to your outline for Unit VI.
> *This is the written outline each student has for the sections of the text for which notes are due.*
> T: Which section of your notes would you likely be in?
> St: Rise of Jackson
> T: And which sub-heading?
> St: American Indian Removal
> T: Find you notes on the Rise of Jackson. Look specifically for the Trail of Tears. See what you've got there. This is what I have in my notes: "Cherokee leaders appealed to the Supreme Court. Supreme Court rules in their favor. Jackson refused to enforce the decision."
> T: This is why I think Jackson should have been impeached. Instead he sent troops to round up the Cherokee. How many had something in your notes?
> *Ten students raise their hands.*
> T: If you had something, how many got it right?
> *Eight hands are raised.*
> T: I have told you that when you are taking notes you are trying to understand. For questions that are wrong, figure out what is missing and put it in your notes. We know from research that what separates students

> who are high achieving is not their intelligence but their ability to understand what they don't know. If you try to understand what you're reading while you take notes, that will help you recognize what you need to ask questions about. (Day 16)

When preparing students for the upcoming test in Unit VI, Karen assigned specific study strategies. She explained them this way in an interview:

> I do have specific study strategies that I have put on the homework hotline. One of them is to complete the organizer on sectionalism and create mnemonics or acronyms to help them remember what's on them because they need to know those regional patterns. Then, complete the Venn diagram and create mnemonics or acronyms to help them remember because they need to know what those two parties stood for. And the other is to list the changes that occurred during this time and identify who was president. It's a question of going back and pulling out what do I absolutely need to remember. (Dur 3C, 1)

The focus of Karen's study strategies are to highlight patterns and connections between events and people during the unit. In explaining her approach to testing, Karen again revealed her beliefs about the importance of understanding rather than memorizing:

> My idea of learning is not a question of remembering. It's a question of understanding. But if you also look at my test questions, there are very few things that you do have to know but there *are* some things you *do* have to know. There are a few key patterns. If you have learned those patterns, then you can figure out the answer to any single question on the test. But no matter how much I walk students through that, they don't get it. Their approach to test taking when you listen to them as they take a group test is strictly rote memory and then, a certain amount of just impulsive guessing if it doesn't come to them right away. So, slowly but surely, I see some change in that but it's a slow process. (Dur 2A, 4)

During the eighth unit of the course, Karen suggested I come see a specific lesson because she was going to highlight to the students how one's background knowledge and beliefs influence learning. In this lesson she was going to address students' conceptions about slavery. She explained that the focus activity would ask students to individually mark a series of statements as accurate or inaccurate based on what they already knew. They would then be

asked to work together using the various reference materials on their table to decide whether their initial perceptions had been correct:

> I'm going to tell you right now they will all agree that most Southerners owned slaves, which is the most common misconception. I'll say, "You know that's a misconception. You see you marked it as accurate but it's an inaccurate statement. That means you have to really work at remembering that." So really what I'm doing is a learning lesson as well as a content lesson. Particularly when you deal with a subject like slavery which has a very high emotional content and people tend to have some pretty deep-seeded ideas. (After, 14)

**Knowledge Bases for Facilitating Students Active Processing of Content**

Karen's subject matter knowledge appears to show qualification as described by Wilson and Sykes (1992). Asking students to identify different perspectives, for example, matching hypothetical speakers' comments with a region based on their view of the protective tariff; insisting that students provide reasons for their decisions, for example, explaining why the construction of the Erie Canal might encourage or discourage the growth of industry; and, sharing her own reasoning about events, for example, believing that Andrew Jackson should have been impeached for ignoring the Supreme Court ruling concerning the Cherokee, all indicate the qualified nature of Karen's historical knowledge, which is needed in order to expose students to multiple interpretations of history.

There is also much evidence, particularly in interview data, that Karen's beliefs about learning have greatly influenced her approach to instruction such that expectations for student behavior, activities, and class discussions all reflect some attention to learning and studying strategies.

**Development of Knowledge Bases for Karen's Transformations of Content**

Karen's subject matter knowledge for the topics she teaches in American History appears to be "deep and usable" and to have a great influence on her goals for teaching and her development of activities. Based on her career story, it would seem reasonable to assume that this knowledge has developed over many years of teaching the same subject. It was not knowledge that Karen appeared to bring to her first year of teaching. Karen reads her students' textbooks carefully year after year, to the point of taking notes because when she teaches she wants to know what her students have read, versus what she has in her head from other texts and other sources. Karen is a voracious reader and she looks for supplemental materials related to her topics regularly, including print and video. During the time of the study, she had watched several documentary series on television, and had previewed a National Geographic series with one of the geography teachers. Without such a commitment to continue to learn in one's area, it also seems reasonable to believe that subject matter knowledge could remain static and not grow significantly over a career.

There are other factors affecting Karen's transformations of content as well. When discussing her overall goals in teaching social studies, Karen highlighted the importance of developing students' thinking abilities:

> It is quite possible for these kids to go through life and never suffer the consequences because they can't remember who wrote the Declaration of Independence. Now, I happen to think that is something they should know. It's a cultural thing but I don't kid myself that you need that information in your head to be successful. But to be successful in this world, you are going to have to have the ability to manipulate information. We are an information economy. Those are the things of the future. (Dur 3B, 10)

The views of learning and thinking that were developed when Karen and Laurie

read the professional literature in those areas are quite evident in Karen's practice. The influence of Costa's (1985) processing skills and Marzano's (1988) dimensions of thinking are most apparent in the focus activities. The nature of Karen's own collaborative work with Laurie has also influenced the emphasis on group work in her classroom. Using small groups, even during testing, allows Karen to be much more aware of her students' understandings and misconceptions. As Wilson and Sykes (1992) explain, subject-specific pedagogical knowledge "is the joint product of reflection on teaching, learners and subject matter, all at once" (p. 273). It is just such reflection that has resulted in the kinds of transformations of US History content described in this chapter.

# CHAPTER 6

# REFLECTIONS ON TWO CLASSES, THE UNIT, THE COURSE: IMPETUS FOR CHANGE

> Teaching is not something one learns to do, once and for all, and then practices, problem-free, for a lifetime, anymore than one knows how to have friend, and follows a static set of directions called "friendship" through each encounter. Teaching depends on growth and development, and it is practiced in dynamic situations that are never twice the same. Wonderful teachers, young and old, will tell of fascinating insights, new understandings, unique encounters with youngsters, the intellectual puzzle and the ethical dilemmas that provide a daily challenge. Teachers, above all, must stay alive to this. (Ayers, 1993, 127-28)

During my observations in the classroom, and throughout my interviews with Karen before, during, and after the unit on change, there were many opportunities for us to share reflections about the teaching and learning going on in her classroom. In this chapter I first present the analysis of the differences between the two observed class periods as this provides a meaningful context for the remainder of the chapter. Next, I present Karen's reflections on the unit and the course. The chapter ends with my analysis of Karen's' continued development evident in her reflections.

## The Two Class Periods

Before the study began Karen described what she saw as the biggest differences between her fourth and fifth period classes:

> Fourth hour is a collection of very highly motivated kids. Even the kids who are not so highly motivated, because they are mixed in with those kids, they work harder. Period five is a very small class and there are just not enough positive role models in there. What you have is a whole lot of kids whose primary focus is adolescent changes. Whenever I do grades, and I look at the class average, fourth hour is consistently about 10% higher. Basically, it's fifth hour's classroom behavior, their attentiveness, and doing their homework, that's different. I'm not talking about ability here, although that may be a factor. It's not a question of ability, though, it's a question of feelings about school. (Before, 2)

The observation excerpts included in the previous chapter were all taken from period four. There was a uniformity in instruction between Karen's classes, for example, same mini-lecture delivered, same focus activity used, same journal writing assigned, and so forth. In many cases, therefore, the mini-lecture or teacher explanation in each class period was very similar. However, due to the nature of different students, no two classes are ever identical. In fact, in the case of fourth versus fifth period, there were discernible patterns of differences that seemed to reduce the effectiveness of what Karen was trying to do. These differences include: student preparation, student engagement, teacher management behaviors, and teacher instructional behaviors.

### Student Preparation

Students in period four were generally prepared when notes were due. On most occasions every student in the class had his or her notes done. If they were not done that day they were completed by the next class. There was not one student in period four who had to complete notes during the days of review for the test in order to take the test in a group. In period five, on the other

hand, there were always students who did not have notes done. There were also students who had to complete notes at the very end of the unit in order to take the test in a group. There were two students in period five who did not complete their notes until after the deadline and Karen grouped them together as opposed to having them take the test with students who had completed notes on time.

In addition to not having notes prepared, students in period five were less likely to have a question to ask after Karen had checked notes. During a number of interviews Karen expressed how powerful she thought student question-asking could be in terms of learning and teaching:

> When you read about learning theory, they talk about the importance of the fact that when children are very small, mothers seem to do almost subconsciously, and I use the choice of mothers intentionally because mothers seem to do it more than fathers do it, is to always peg their questions just a little bit beyond where there child is. One of the things that I have learned, frustrating as this might be to me, if I really want the kids to know something, I have got to start where they are at. The only way I have of knowing that is by working from their questions. If I can get them to ask me questions, then I can try and peg that just a little bit beyond where they are. (Dur 3B, 18)

There were striking differences between the two periods in terms of question-asking. There were days in period five when no one, or only one student, actually asked a question. Only once in period four did a student not ask a question when called on. On the other hand, there were days in fourth period when there were so many volunteered questions from students that no one needed to be called on. There was never a volunteered question in period five. There were days when questions and answers lasted more than ten minutes in period four and less than five minutes in period five. The question and answer time was never longer in period five than in period four.

In addition to Karen not being able to "start where they are at" based on the students' questions, another result of the infrequency of questions in period five is that these students heard fewer teacher explanations about the content. For example, the explanation of the significance of the Erie Canal or the changing patterns in where crops have been grown, which were described in the previous chapter as examples of how Karen addressed relationships, did not occur in fifth period as students asked few questions that day and nothing related to the changes in transportation or agriculture. Given Karen's emphasis on using students' questions to provide instruction, the absence of questions from students resulted in significant differences in learning opportunities.

When students did ask questions in period five they seemed qualitatively different from the questions in period four. Students in period four tended to ask 'why' questions, while students in period five asked 'what' questions. In examining the different sets of questions that were asked, those in period four appeared to reflect students' perplexity about something they read, whereas the nature of the questions asked in period five suggest they were intended to meet a requirement.

Karen expressed her disappointment to students in period five when they did not use their time to prepare questions:

> (One student responds with a question. The next three do not have questions.)
> T: When I'm checking notes, you're supposed to come up with questions. Does *anyone* have a question? (Long pause) When you're reading, try to form mental pictures. (Day 2)

**Student Engagement**

Period five generally spent less time and less engaged time on small group work. Students in period four began their small group assignments almost

immediately, and there was talk for longer periods of time in period four than period five. Based on the student talk that was overheard in both periods, the students in period four were consistently on-task throughout their group work time. Some students in period five, however, were frequently discussing things unrelated to the activity at-hand. It was also more common in period five to see a student working alone while the other students in the group were talking, or to see an entire group of students working individually. These students were on-task but not working cooperatively. This did not occur in period four.

In one interview Karen was explaining what she felt students got out of the focus activity the day before on sectional interests, and revealed what she sees as a problem with the group work in period five:

> There is a tremendous variance but I will say this, I think every group got enough to get by. Some groups did much better than others. The difference was, was there somebody in the group who has the language skills to pull that out and to really analyze and summarize? There are a few of them who do it very, very well. This is where the group is the scaffolding if you've got one kid who can do it. Unfortunately the problem that I have in a class like 5th hour, I don't have enough role models to spread around. (Dur 3B, 15)

The scaffolding intent of the small group had a much greater chance of falling apart in period five.

Interestingly, when I returned during later units, I was able to see the changes that occurred in engagement due to changes in group assignment. One group that I had observed fairly closely because of its proximity to me had three males who were regularly off-task, and one female who worked individually. In the new unit, a male student from that group who had frequently been disruptive to the entire class, was in a group with three on-task females. His behavior was dramatically improved in the lesson I observed.

There were times when students in period five were enthusiastically engaged in a focus activity or part of a focus activity. For example, all students in period five were actively participating in the drawing of transportation routes on the laminated maps. Similarly, they were all on-task in the computer lab working with the database assignment. It was the follow-up of the activity where the differences between fourth and fifth period showed on these days. For example, when Karen asked the students to write about the different transportation routes that would be needed for wheat, wool, cotton, vegetables, and textiles, although students in period four seemed to struggle with this assignment and needed encouragement from her to keep going, most students in period five did not attempt it.

**Teacher Management Behaviors**

It was not uncommon for an assignment to be over in half the time in period five than in period four. However, this did not provide period five with extra time because of how the teacher time was spent in this period. There was time spent on individual student behavior in period five that never occurred in period four. Since students regularly were missing their notes, Karen would take a quick moment here or there to check with individual students. At least eight students in period five were disruptive to the class on a regular basis. Several times during the unit Karen wrote out disciplinary slips during class time because she felt the behavior needed to be addressed such as, refusal to get materials or refusal to participate. Karen did not want students to feel they could sit in class and talk when they have come unprepared and are unwilling to do the activity. A deficiency was never written out during period four.

**Teacher's Instructional Changes**

Minor differences in the instruction between periods four and five did occur. It would be hard to imagine a teacher conducting exactly the same lesson several times in a row. However, on occasion, there were relatively major and deliberate changes made in the instruction between the two classes. This happened on the second day of the unit when Karen was introducing the changes in manufacturing. First, Period 4:

> T: Take out a blank piece of paper.
> (T turns on the overhead projector.)
> T: The book talks about changes in technology. Making clothing was low technology because most of the process was human. There are three things you need to develop higher technology.
> (The overhead transparency shows supporting industries, capital goods and investments.)
> T: Please make three columns on your paper: supporting industries, capital goods, and investment. Imagine these first textile mills: what industries you would need, what capital goods would you need, what sources for investment? (Day 2)

During period five, Karen adjusted the activity by providing students with time to generate their own ideas about starting new industries before pursuing her mini-lecture:

> T: Please take out a piece of paper and give it a title, Starting a Textile Mill. Talk among yourselves and describe what you would need.
> (Sts discuss in their groups.)
> T: You were reading about change in technology. The Industrial Revolution was a jump or improvement in technology. Who has ever sewn?
> Several sts raise their hands.
> T: What did you start with?
> St responds thread, another responds fabric.
> T: Before the Industrial Revolution you couldn't buy thread and you couldn't but cloth. ... Before the Industrial Revolution every member of a family was needed to feed and clothe everyone. High technology requires certain things. What did you have on your list?
> (T takes st response of 'buildings' and introduces the concept of 'supporting industries'; the st response of 'workers' is connected to 'capital,' and so forth.)

Karen explained her reasoning for the change this way:

> I saw fourth hour floundering with the list and decided that part of the reason they were floundering was because I was asking them to use the terminology from the technology overhead. They just really weren't comfortable with that. And I knew if they were floundering, I'd lose fifth hour. ... I decided to start with trying to get them to use their imagination and picture what goes into the manufacturing process. Then, based on what I heard them or saw them come up with that that would give me a clue as to what I needed to do make the transparency more meaningful. I did not want them floundering and getting all hung up on the terminology which was not terribly important. What I was trying to get them to do was create mental pictures. Do you have any idea in your head what a textile factory does? (Dur 1, 5)

She was pleased with this change and continued to present the material that way for her next two classes. This example of her interactive decision-making demonstrates the influence of her knowledge about learning, as well as her knowledge about her learners, on her instructional practice. She wanted students to be able to actively construct an image of a textile mill, not necessarily memorize the terminology associated with the changes in technology.

The main reason that the differences between students' behavior and performance in the two periods have been highlighted in this chapter is because Karen feels that the numbers of her students who are highly motivated, as the students in period four, are decreasing, and the number of students who appear disengaged to some degree are increasing. That is, she believes that classes like period five are becoming more typical. This has caused Karen some concern and is evident in her reflections.

## The Unit

As the unit progressed, Karen and I spoke about how she felt activities were going. She usually had suggestions for revising lessons for next time. She had

ideas about editing worksheets to make a task clearer to students, adding a reading because she felt the students needed more background knowledge on a topic, or spending more time setting up or debriefing an idea. For example, she was disappointed with the growth of democracy map activities completed in the computer lab. Students were asked to color the states on their outline maps according to their voting qualifications during the 1824 to 1840 presidential elections (see Appendix C). She did not feel the maps they created allowed them to see the changes in democracy she was after:

> They have five maps there to deal with. The hard thing is getting kids to recognize what does that map represent. I think another year, I would hand out the assignment in the classroom before we ever got to the computer lab. I would talk about what they needed to do and try to develop some conceptual understanding of why we are doing this. If you don't understand why it's important that you use the same color, for example, to represent the same characteristic on all five maps, then you won't see any patterns. (Dur 3B, 1)

When we met to discuss the unit after it was completed, Karen had scored the unit tests and had run an item analysis. She referred to this analysis at different times during the interview. In general, she was relatively pleased with how the unit had gone. When I asked her to evaluate how well she thought the main generalizations had been understood by the students, she began with their understanding of the Industrial Revolution:

> My feeling, from what I heard is, they did a very good job of understanding the Industrial Revolution, in fact, perhaps even better than in other years, in terms of having an idea of the shift. Now, do they really appreciate all of the ramifications? No, but I don't expect them to. I'm laying the groundwork. I don't expect mastery here. (After, 1)

She was less pleased with how the students performed on the test with regard to democracy:

> Democracy, we were less successful. Two of the most frequently missed questions on the test had to do with involving recognizing what changes

> were becoming more democratic. That may be somewhat influenced by the fact that I think the time we spent in the computer lab, the focus was more on the technology than it was on democracy. I perhaps should have done more to debrief that. I don't know. On the other hand, you always walk a thin line because if you do debrief too much, you lose them. (After, 1)

Despite the disappointment with the students' lack of understanding of the growth of democracy, Karen felt that the database technology objective had been met by the computer assignment. There was an interesting anecdotal story that Karen shared with me that makes the point. Karen had volunteered to participate in a computer night at the school in which the sixth graders who will be attending Jefferson next year, and their parents, are invited to come to the school and see what's being done with technology. Karen asked her students who might be interested in demonstrating the election database for the parents and future middle school students. It was interesting that none of the students who volunteered were students who were doing particularly well in Karen's class. One student was one of the more disruptive students from fifth period. Karen accepted their offers and they came to show parents how they learned to organize, sort, and find with the database.

Unfortunately, some of the other technology demonstrations were a little more exciting (i.e., creating a digital image with the camera and then printing it out, and interacting with game-like Hyper Studio stacks), and Karen's students had only a few interested observers. Karen's feeling was the focus was on impressing parents but perhaps not really showing how technology was actually being used in courses. However, what impressed Karen that evening was that the students who volunteered to demonstrate were quite adept at using the database. This seemed to bolster her confidence that most of her students had

indeed achieved the technology objective of the computer assignment.

In terms of the generalization on sectionalism in the unit, Karen did not feel they had developed as much understanding as she would have hoped, but she felt this would be followed up:

> Sectionalism, [there was] a real variance from class to class. Some classes came away with some pretty good idea of the connection between the changes in the economy and the political tensions and other classes don't have a clue. But again, that is something that we will do even more with in the next unit as we start to focus on slavery and the events leading up to the war. So that was an introductory sort of thing. (After, 1)

In determining the success of the unit, Karen relied on the item analysis of the test, what she had heard students say during the test, and comparisons she made with previous students. When she did not feel her students' understanding was what she had hoped it would be, she looked for reasons why. For example, she felt their understanding of the changes in democracy was hampered by the fact that many of them developed poor maps from the database. Karen reflected on how to improve this situation next time. She also commented on what she felt the students had done well, the technology objective, and what could be addressed and reinforced in upcoming units, the ideas of sectionalism. While Karen seemed generally pleased with this particular unit, and may have felt similarly with regard to other specific units during the year, her reflections on the entire course show evidence of her wanting more substantive changes in her instruction.

## The Course

General feelings about her learners, as opposed to specific ideas for improving activities in the unit on change, came across in numerous unit interviews. In addition, we met at the end of the school year specifically to

discuss Karen's reflections on the course. I found two major themes running through the various interview data, neither of which was directly related to content: her feelings about students' perceptions about learning, and student interest.

**Student Perceptions about Learning**

One comment that was repeated by Karen during several interviews was the idea of 'fighting students' perceptions.' In a "before" unit interview in which Karen was explaining her class requirements and assignments, she discussed the students' resistance to the textbook note-taking but showed an understanding of why students may feel this way:

> I know I'm fighting some perceptions. I think the biggest struggle of kids doing their history homework is that it doesn't fit their definition of homework. They want a worksheet with blanks they can fill in. And I give them, "Go home and read the book and take notes on it. ... For kids who have gone this far through their schooling and have never been asked to do anything that's unstructured, [anything] that puts that much responsibility on their shoulders, that is very disconcerting to them. Yet, you can't keep putting it off, you know. The stakes are still relatively low at this point. (Before B, 17)

Karen also felt that the students' perceptions of reading interfered with her objectives for both the note-taking and question-asking activities:

> I can get up and talk until I am blue in the face about the difference between remembering and understanding and they don't know what I'm talking about because they've never felt it. So, that's really what's at the root of this. They go to read their book and they don't have any words that jump off the page at them that they don't understand so, therefore, they don't have any questions because they are not trying to think. When they take notes, all a lot of them are doing is copying. I don't know what to do about that. (Dur 3A, 10)

Again, showing an understanding of why students might approach her assignments this way, Karen explained her feelings about how students have come to view learning through their school experiences:

> It goes back to the fact that I think they have been taught to be passive in school and because they are not actively engaged, not much registers. ... We have rewarded the behavior that involves copying - going to the book, recognizing the right answer, and copying it. We have done entirely too much to encourage rote memorization, to reward timed tests, the ability to remember. So, they have learned that school work should be go to the book and find the answer and copy it down and memorize it and give it back on the test and then forget it. That's the mental picture that they have of learning instead of that learning should start with curiosity and asking questions and figuring out answers and solving problems. That is alien to them. (Dur 2A, 5)

Karen is clearly concerned about students' resistance to actually doing their work and about the quality of the work they do. What is interesting is her response to the situation is to rethink her role in how to structure her classroom and her approach to homework to help students:

> I already do a lot of organizers - Venn diagrams, charts and that sort of thing. What I am going to try and do for some of the reading assignments is replace them with doing those organizers and letting them [the students] use the books in the classroom. Let that substitute for that reading and note taking. I'm doing this because in the past I have tried to teach note taking by modeling different strategies for them, then sending them home to do it at their own pace but without anyone looking over their shoulder. Then, teach them how to analyze it themselves. It's worked fairly well for some kids but I think this year what I ran into for the first time, and I haven't really felt this before, but I felt like I never had test scores as low as they've been this year. I felt like part of the reason was that when they did the Venn diagrams and the charts using the notes, there was just too much information that wasn't in their notes. So, they never really had a good Venn diagram or chart or any other organizer to study from. (Course 2, 7)

**Student Interest**

Another big area of concern that ran across many interviews was the lack of student interest in the activities in the class. Karen sensed in her students a basic lack of curiosity about history:

> My students live very much in the now, with little sense of their family history, and if you don't have some sense of your own history and how that's contributed to who you are, then it's very hard to seek much interest in the history of our country. I still cannot to this day drive across the state without marveling and trying to picture what it must

> have been like to cross this state on foot or horseback or in a wagon with seven foot tall grass. Coming to the top of a hill and seeing buffalo as far as you could see. You know, these kids have never tried to picture that. So, I try to give it to them sometimes, some of the sense of awe and curiosity. Unfortunately, that's pretty hard to *give* somebody. (Dur 1A, 4)

Karen struggles with the difference between her curiosity and interest in history, and her students'. In one interview, she reflected on the students' generally poor performance on a journal writing assignment on the transportation routes they had drawn on the laminated maps:

> There was no thought involved at all. That's a continual war I fight with myself. I think it's because they are typical 8th graders. They will do what they think they have to do to get by. They are not in there with any real curiosity about transportation routes. See, to me that is the hardest thing for me to accept. I find this fascinating and they don't give a hoot. That's really what you saw coming out there was frustration. They are not trying to understand. (Dur 3A, 4)

In contrast to what Karen was seeing in her current classes, she remembered back to when Laurie and she did a history fair with students. Karen described the project two students worked on, and how this is part of what she thinks students should be doing in history:

> I had two young men who were so curious about, got so wrapped up in the Oregon Trail, that as a result they went to the university and dug out all sorts of statistics about how many people went West during each year of the 1840's. Then, they graphed that and discovered a very real anomaly in the sense that the graph wound up something like it peaked and then went way down one year and then way back up even higher the next year which immediately presented them with this question. Why was there this one year when nobody went West? So then, they started digging for possible explanations. They never did come up with an answer but they came up with three different theories. They couldn't find any evidence to prove any one of them. I was just so absolutely thrilled because that, to me, that's the essence of historical research. You dig out facts. You look for patterns. You find a question and then you try and answer it. You have a hypothesis and then you look for evidence. (Dur 3B, 8)

I think Karen sees some potential for the computer to provide the spark that

would get students interested in asking questions about history. After she had completed the first day in the computer lab, during which time the students did a brief exploratory worksheet using the database, Karen shared her positive feelings about the students' interest:

> In terms of the way I set up the assignment, ten simple questions like that, where you had to organize and sort different ways to find the answers and if you did you could do it quite quickly, work really well. It got the kids hooked. It got most of them thinking a little and it got them manipulating the database. (Dur 3A, 19)

In thinking about the future, Karen is focused on ways that computers can be helpful to provide 'hooks':

> My friend the librarian gave me something...sounds marvelous, a CD-ROM simulation called 'Pilgrim Quest' that simulates colonization. If I could start with something like that, sort of like what we did with the Oregon Trail and get the kids experiencing and from that asking questions and then lead that into researching and looking for patterns ... I think it has enormous possibilities. The kids would be active learners and that's what we've got to do. If you are going to learn, you have got to get involved. (Dur 3B, 9)

Karen's ideas about hooking her students and getting them involved more have obvious implications for changing students' perceptions about learning in her classroom. If she can get students to ask their own questions and find excitement in learning about history, then she has also triggered them to be more active learners.

Karen's comments about her students, and her ideas on how to change, strike this researcher as evidence that she is entering another, and perhaps final, phase in her teaching career. It would appear that many of the same conditions that were present ten years ago when she began to work with Laurie are present again, that is, another 'fateful confluence' which has the potential to bring about significant change.

## Entering A New Phase

After nearly ten years of collaborating together, with a number of those years involving weekly Sunday meetings, the year before the study, Laurie taught a different grade level from Karen at Jefferson and was part-time at the other middle school. The following year, the principal from Jefferson became the principal of a newly-built middle school on the south side of town, and Laurie transferred to the new facility. Losing the close working relationship with her colleague, although they still keep in touch, appeared to be the beginning of a transitional time for Karen.

During this same period, there has also been growing dissatisfaction with what Karen has seen in her students. During the year of the study, raw eggs were thrown on Karen's car in the parking lot; a student called her a "fucking bitch" in class; she overheard a male student using offensive, sexually-explicit language directed to a female sitting in his small group; a number of her students were chronically truant; and several students were in the juvenile court system. In addition to all these outward behavior problems, when Karen reflected on her course at the end of the year, as indicated in the previous section, she was disappointed with student performance as she sees a drop in student achievement from years passed. Karen feels her students have been changing and now more students than not have the characteristics of inattentiveness, apathy toward school, and difficulty with reading and reasoning that was observed in many of her fifth period students.

Karen told me before the study began and numerous times during our initial interviews that she was 'coasting' right now. In fact, coasting may be a good way to describe a transition period before moving into another phase. Working

with me may have prompted some new thinking to occur in Karen as our work had some of the same characteristics of her interactions with Laurie. I had observed Karen' lesson two periods each day, we met regularly, and I talked with her about how she thought things went, and why she did what she did. In fact, Karen mentioned that meeting with me was a bit like meeting with Laurie. It was getting her to reflect again on her teaching. I surmise that such reflection may prompt one out of 'coasting.' This would be consistent with the literature on teacher change in which teachers have worked collaboratively with researchers and/or other teachers on a project (e.g., Hunsaker & Johnston, 1992; Louden, 1991; Wilson, Miller, & Yerkes, 1993; Wood, Cobb, & Yackel, 1991).

Another 'prompt' for change for Karen will probably occur as a result of her volunteering to teach two classes of 9th grade US History next year. While Karen indicated that it was certainly her turn to teach another preparation after having only one for twenty-eight years, I don't believe the administration would ever have forced this situation on such a veteran teacher. Rather, I see this as more evidence of Karen's enduring curiosity about her own learning and her students:

> There are things about teaching more current history that excite me. On the other hand, right now, my focus is on totally changing the way I teach history again. Two preps scare me. (Prof Exp, 2C, 5)

In the beginning of Karen's last phase in her career, the thinking skills research provided Laurie and her with tools for changing their practice. Similarly, there appear to be possible tools to help Karen now. Specifically, at the school level there are changes afoot to try and address the needs of the growing number of students who appear to be at-risk for failure. One approach

will be a new advisor/advisee program implemented the year after next. The other resource for changing practice that has received more emphasis at the school level is technology. Each of these will be discussed below.

**Advisor/Advisee Program**

Karen has been a member of the advisor/advisee committee at the school and is hopeful that the program will help to address some of the discipline issues in the school:

> This [advisor/advisee program] is an essential cornerstone of middle school philosophy. I have felt all along that this was something that we ought to have. ... The whole idea of an advisor/advisee program really is to provide some continuity, to break up this huge building so that the children don't feel anonymous. That's what contributes to some of our discipline problems is that sense of anonymity. I have felt in the past that we made up for the lack of an advisor/advisee program in some ways. And I do think we do at Jefferson, although, it's diminished in the last year. (Prof Exp 3A)

Even with her complete support of such a program, Karen is careful not to expect it to do more than it can deliver. The current proposal is that the school will eliminate the split lunch period and instead, the forty-five minute periods during the lunch hours will be divided into twenty-three minutes for lunch and twenty-two minutes in a homeroom: twelve minutes for Channel One, and ten for advising. The counseling staff proposed a series of group activities for that ten-minute time period which struck Karen as unrealistic:

> A lot of the people who are on the advisor/advisee committee, I think do see this as a counseling function and as a panacea. I think they have some very overblown ideas as to what you can successfully do. That leads to a great deal of disillusionment when it doesn't live up to your expectations. It's sort of like in politics. They talk about lowering expectations. I think that in a sense, for some of the staff we need to lower the expectations and for others we just need to provide some reassurance. (Prof Exp 3A)

Karen has more specific expectations for what could feasibly be

accomplished in the proposed advisor/advisee program and they reflect her focus on students' learning and study skills:

> A lot of the things that are on that list from the counselors, we now address both in seventh grade health and ninth grade health. Where I think we need to direct our attention is following up on our study skills instruction and that the advisor would become really an academic advisor in a way but also, for lack of a better term, sort of a parent figure. Someone who's there to guide and advise and be non-judgmental because these would not necessarily be students we have in class. We would do the follow up on deficiency slips but this would be totally non-judgmental in the sense that we're not grading them. (Prof Exp 3A)

**Technology**

Many of Karen's thoughts about changing her instruction to address her students' lack of interest, were focused on uses of video, CD-ROM simulations, databases, and the Internet. She clearly sees hopes for technology as a possible tool to address the challenges she's seeing in terms of reaching her students. It was clear from her descriptions of how she would like to use these resources that her views of learning and beliefs about her students, as well as her sense of pattern development in her subject matter will continue to guide her instructional choices. However, she is obviously poised to think about new ways to transform her content.

Karen's response to the challenges and changes described in this chapter say much about her development as a teacher. It distinguishes the teacher in this phase from the teacher who considered leaving in earlier phases. Karen knows she has confronted and solved problems before; she knows the value of collaborating with peers; she knows how important it is to be realistic in what you can do and to focus on the positive.

# CHAPTER 7

# DISCUSSION

> There is a need to establish with some degree of confidence what factors can be linked concretely to the daily practices of social studies teachers. Identifying, elaborating, and mapping these factors onto the school and classroom terrain offer some promise in improving what social studies teachers do, even if that terrain becomes far more complicated than what we now have. At the very least, the map will be more faithful and less likely to lead to fool's gold and disillusionment. (Cuban, 1991, p. 207)

This study set out to map the terrain of one veteran teacher's career in teaching middle school social studies. The following research questions were proposed at the outset of the study:

(1) What has developed over the course of Karen's career, specifically, how has Karen's knowledge about social studies, teaching and learning changed?
(2) What appears to have influenced or brought about changes in Karen's knowledge bases, specifically, what factors seemed most critical to Karen's professional development?
(3) How is Karen's instruction influenced by her knowledge bases, specifically, how has her teaching of history been affected by changes in her thinking about subject matter, teaching and learning?

What has been learned from Karen's story by investigating each of these questions, as well as implications for future research, is the focus of this chapter. The literature on teacher development, teacher knowledge, and social

studies instruction informed the study, and are informed by the study. Each of these areas is addressed: first, in terms of findings from this study, then, in terms of implications.

## Karen's Development

Analysis of the interview data suggests that several factors had a direct impact on Karen's development through her career: a sense of dissatisfaction, availability of knowledge and resources, and, collaboration.

### A Sense of Dissatisfaction

The biggest changes that took place in Karen's thinking about teaching occurred after her first year of teaching, after the birth of her daughter, and after the arrival of Laurie to Jefferson. What all these events share in common is a sense of dissatisfaction, a feeling that things were not the way Karen wanted them to be. This view of teacher change is reminiscent of the literature on conceptual change in student learning, that is, learners must have conceptions challenged in such a way that they experience disequilibrium (Roth, 1990; Strike & Posner, 1985). In the case of teaching for conceptual change, the teacher provides experiences for students to confront their prior conceptions. In Karen's case, she is the source of the disequilibrium. As Cuban (in Hawthorne, 1992) suggests, "teachers are both the object and the agents of their own change."

What has made Karen the agent of her own change appears to be her intense curiosity. When she was in her first year of teaching, she struggled with the attitudes in the school that her low-track students could not learn, and with the birth of her daughter she became a careful observer of learning. These events triggered an enduring curiosity about learning:

> Since my oldest daughter was born and I watched her learn, I have been continually curious about my own learning. How have I learned what I have learned? What has driven me to be a crossword puzzle nut? How do I remember certain things? Why does it come to me? Why am I good at that, but I'm no good at something else? These kinds of questions drive me. ... I basically love to learn. Curiosity. Glasser has a statement, "Curiosity creates learning." I'm curious and my curiosity is not so much about history, although I certainly can get all hung up in curiosity about history. My driving curiosity is about kids. (Dur 3B, 9)

Without her curiosity about her own daughter's learning, and a vision of what that meant for her students, Karen may never have developed the degree of dissatisfaction that led to changes in her thinking about teaching. As someone who is curious about learning, and who loves to learn, Karen experiences unease or dissatisfaction when her goals of learning are not being met.

As discussed in the previous chapter, I believe Karen is on the verge of another significant change in her practice in the very near future. While she expressed general satisfaction with the unit I observed, her overall frustration with low student performance and lack of student interest represents a significant challenge to her vision of thoughtful classroom learning.

Experiencing and recognizing dissatisfaction will not be sufficient for Karen to change her teaching now, just as it wasn't sufficient earlier on in her career. There has to be knowledge and resources available to address the dissatisfaction. That eluded Karen for some time in the early part of her career.

**Availability of Knowledge and Resources for Change**

In one sense, Karen's own children provided her with a source of information about learning, but her observations did not provide the answers she felt she needed for her teaching. Similarly, her conversations with fellow teachers at Jefferson, described by her as reflective discussions about students and learning, did not really focus on solutions to the problems Karen wanted to

solve. She needed some specific ideas on how to bridge the gap between her vision of her students' learning and what she observed in her classroom.

Karen cites her joining of Phi Delta Kappan and Association for Supervision and Curriculum Development as a major turning point for her. Over time, the professional literature that she received from these organizations provided Karen with accessible knowledge about constructivist views of learning, thinking skills, study strategies, and so forth. These materials appear to have given her the source of information she needed for thinking about her teaching. Karen stated specifically that she had not found the social studies journals of help as they seemed to focus more on what to teach in social studies rather than how.

Currently, Karen is seeking sources of information to address the problems of student interest and performance she has identified. She has been locating and reading professional books that help her better understand the young people in her classroom. She mentioned Endangered Minds and Children Without a Conscience, for example. Karen also feels one promising area for possible solutions to these problems is technology, yet she also shared how unlikely it would be to have a computer in her classroom. Karen submitted an inquiry to the district office about the possibility of using funds for supplemental materials, and perhaps even textbooks, toward computers. As it turns out, Karen received a computer, with access to the Internet, a year after the study. She completed a curriculum development project the next summer in which she compiled a list of promising web sites for social studies. One has to wonder what effect it might have had on Karen's future development if she had been correct about the lack of availability of a computer. Of course, Karen's dreams

include about six computers in the room so each group of students could work together on one, so it's still unclear how the possible lack of resources will affect her ideas about changing her teaching.

It's impossible to know what Karen would have done with her newly acquired information about thinking skills without the arrival of Laurie at Jefferson. An investigation of that important relationship may have important implications for Karen's current desire to change her practice.

**Collaboration**

Karen's relationship with Laurie was unlike any other before it. Although she enjoyed talking with other teachers at Jefferson and considered the school environment supportive, what some might call collegial, it did not provide Karen with the working relationships she needed for change.

Karen and Laurie's collaboration had several characteristics that seemed to lead to teacher growth. First these teachers planned together. This may be the most important characteristic that is missing from other examples of collegiality (Hargreaves, 1992). Karen and Laurie were teaching the same subject at the same grade level. This means that they were collaboratively discussing how to transform content into specific instructional activities. Additionally, Karen and Laurie were able to reflect together on what had happened in their classrooms, sharing with one another the patterns that each had seen when they implemented new activities:

> We'd get together every Sunday morning and start talking. It's when I would reflect back and talk to her that I would start to recognize, "Yes, I have seen a pattern." ... Patterns in terms of the way in which students interpreted things. We would pick up on misunderstandings that were a pattern. Something that was in their textbook that was consistently misunderstood by a majority of the students and they all misunderstood it in the same way. So then we would go back and ask ourselves, "How

> could they possibly come up...?" And then, we'd go back and look at the content and "Oh yes, I can see that." (Dur 3A, 8 & 9)

They also provided necessary support to keep going even when things didn't seem to work the way they hoped they would. Finally, the fact that Karen and Laurie were collaborating in their own learning about teaching seemed instrumental in making some of the specific changes that they made in their classrooms, that is, their emphasis on small group work.

Even with Karen's current interest and desire to explore technology, there is reason to believe that collaboration with another teacher or teachers would facilitate her development as it did when she collaborated with Laurie. During the unit on change, Karen reported that she was "terrified" when trying out the new computer database assignment because of her own lack of skill in manipulating databases. She spent a great deal of time in the computer lab during her free periods and also after school the two weeks before the assignment, not to mention the time spent in the summer creating the database. This change of a focus activity, relatively minor compared to what may lie ahead, was difficult and stressful for Karen to undertake. It only seems reasonable to assume that planning and reflecting with a colleague may provide the encouragement and support needed to engage in significant risk-taking and change.

## Teacher Development

Karen's story of development, like other teachers' stories, is truly a personal journey of discovery, influenced by her experiences as a student, her teacher preparation program, her first impressions of teaching, her subject matter, her teaching colleagues, her students, and so forth. While it is true that

"learning to teach is at once professional and deeply personal" (Wilson, Miller & Yerkes, 1993, p. 90), the serendipitous nature of Karen's professional development over such a lengthy career is troubling.

The standard approach to teacher development, the teacher workshop, did not seem to be a major factor in Karen's career. She mentioned specific presenters she remembered from over the years, for example Gregoric, Madeline Hunter, and a representative form the Department of Education from the Carter administration, whose ideas she had found interesting. However, those staff development experiences were not what contributed to significant change in Karen's thinking abut teaching or her instructional practice. For Karen, the coming together of her own dissatisfaction, or a problem of teaching to be solved, with knowledge and resources, and a collaborative peer, resulted in significant professional development.

When I interviewed Laurie and Karen together and asked them what they thought productive staff development should provide teachers they spoke simultaneously:

> Karen: Thinking time
> Laurie: Time for reflection (Prof Exp 2C, 20)

As the discussion continued they added other dimensions:

> Laurie: Encouragement. Provide professional encouragement. I think study groups would be a good way to go and yet time becomes a big factor.
>
> Karen: I think you have to face the reality that different teachers are at different places at different points in their career. There's no single need. There has to be more trust. I think that behind all of your problems of staff development is this assumption that it is something that is done to teachers and that there has to be something at the end that is proof whether it's what they intended or not. It is approached as training rather than as a real learning evolution.

> Laurie: I think a study group that would provide emotional support and would provide professional discussion and yet it has to be some soul people. People who understand where you're coming from. (Prof Exp 2C, 20)

Their comments about what teachers might need to truly experience professional development are amazingly similar to the factors identified by Wilson, Miller and Yerkes (1993): time and trust, courage and commitment. They also resonate with the ideas of staff development presented by Lieberman (1995):

> What everyone appears to want for students - a wide array of learning opportunities that engage students in experiencing, creating, and solving real problems, using their own experiences, and working with others - is for some reason denied to teachers when they are learners. In the traditional view of staff development, workshops and conferences conducted outside the school count, but authentic opportunities to learn from and with colleagues *inside* the school do not. (p. 591)

## Karen's Knowledge

Wilson and Sykes (1992) suggest that subject matter knowledge and subject-specific pedagogical knowledge are the two most fundamental requirements for good history teaching. The observational and interview data with Karen provided information about both of these knowledge bases.

### Subject Matter Knowledge

The data indicated that Karen's subject matter knowledge is elaborated, differentiated, qualified, and integrated. That is, it appears to represent coherent understanding of historical phenomena, making it usable and teachable knowledge (Wilson & Sykes, 1992, p.271).

Much of Karen's subject matter knowledge appears to have been learned on the job as she was not a history major in her undergraduate program. The biggest source of information has undoubtedly been the different textbooks

from which Karen has taught. However, Karen's knowledge seems to go well beyond the factual and chronological content of Mr. Barnes in Wilson and Wineburg's study (1993, p. 752). Karen had possession of intricate details and shared supplemental materials with students that extended ideas mentioned in the book. Perhaps what's significant is the way Karen combined and selected information from the various textbooks and supplemental materials she read.

Karen clearly sees the importance of her own subject matter knowledge to being a good teacher. For example, she expressed concern about having enough background knowledge to do justice to her new preparation in 9th grade history. This course is an extension of the content she currently teaches, and covers the time periods in which she grew up. While another teacher with Karen's background might feel satisfied with such subject matter knowledge for the course, Karen is not.

Karen is an avid reader, but her usual content-related reading is focused on current events. She is also a daily consumer of new shows, and particularly enjoys her 'CNN Sundays.' Karen does watch historical shows when they are on television, and we discussed some of these, for example, the *500 Nations, The Way West,* and *American Revolution* series which were broadcast during the time of the study.

Meanwhile, substantive changes in the nature of subject matter knowledge in the social sciences continue to take place. An article in *Education Week* on November 16, 1994, reporting on the new history standards coming from UCLA's Center for History in the Schools, stated that the standards represented "a sweeping view of the world that few precollegiate students have likely encountered before" (p. 1). It is unclear from the data the extent to which

Karen has developed or will develop such a "sweeping view of the world." Indeed, there was very little evidence of attention to women or people of color in the unit on change. By her own account Karen admits to wanting to do more with the Native American viewpoint in her class, but has struggled to find materials that she thinks are suitable for her eighth graders.

**Subject-Specific Pedagogical Knowledge**

The observational and interview data also suggest that Karen has rich pedagogical content knowledge. This has been defined by Grossman (1990) as "knowledge that is specific to teaching particular subject matters" (p. 7). Nancy demonstrated an awareness of her students' conceptions about a variety of topics and ideas in the course. For example, her focus activity in the lesson on slavery was prompted by her beliefs about her students' misconceptions; she frequently made connections between current day happenings students might understand and what she was teaching; and, she continually looked for new ways to transform content for her students. The database used by Karen in the computer assignment was created by her the summer before the study. She found the data in an unpublished doctoral dissertation and created the database because she felt it was a more accurate representation of changes in democracy than the statistics that had been used in the past. The fall before the study Karen spent time editing episodes of the *Civil War* series so that she could show in class exactly the parts she wanted and no more. I think these examples, and others in the data, demonstrate rather clearly that Karen does indeed reflect on her subject matter, her teaching, and her learners. Perhaps what is more interesting in terms of this study is how her subject-specific pedagogical knowledge has developed.

In considering the development of subject-specific pedagogical knowledge in undergraduates, Wilson and Sykes (1992) propose the following:

> Imagine, for example, a course entitled "Learners and Learning in History" in which prospective teachers use learning theories to think specifically about the teaching of history. They could interview a number of students before and after exposure to a given topic in a history class, and then analyze how the students' prior knowledge and beliefs influenced their subsequent learning. (p. 277)

In the follow-up course, the prospective teachers would extend their understanding to include how to represent knowledge to students:

> Entitled "Knowledge, Its Representations, Its Transformations," such a course might require that teachers reflect, first, on their own mental representations of the subject matter, second, on representations of knowledge they want to present to students. Using their developing understanding of learners and learning, teacher should practice generating multiple representations, testing them against the standards of knowledge set forth by the discipline *and* the students they are teaching. (p. 278)

In essence, Karen and Laurie created their own courses on learning and pedagogy. The central focus of their work was the general pedagogical knowledge they were reading in the professional literature. This study leaves no doubt as to the powerful impact of this pedagogical knowledge on Karen's teaching. This knowledge allowed her to generate pedagogical content knowledge in the area of social studies, including how to represent historical knowledge to her middle school students.

Wilson and Wineburg (1993) found that differences in pedagogical content knowledge was a major distinction between the more experienced history teacher in their study and the more recently prepared teacher. Cohen (1991), in her study of five veteran high school teachers (although none was a social studies teacher), reports that this form of knowledge was missing from the teachers' preparation program:

> What they describe as lacking from their own educations comes close to what Shulman (1986) calls "pedagogical content knowledge," or knowledge of a subject presented as it might be taught, with a sensitivity to the structures of specific disciplines and to the way learners assimilate those structures. Whereas traditional methods courses offer teaching skills devoid of content, and traditional academic courses offer content devoid of teaching skills, pedagogical content knowledge is the necessary bridge between the two. Even these gifted teachers appear to have struggled in the beginning for the lack of it. (p. 108)

While Karen did not appear to possess this knowledge when she began teaching either, she has clearly developed it on the job.

## Teacher Knowledge

When there are sweeping changes in subject matter knowledge, what systematic opportunities are there for teachers to stay current? None of the staff development topics that Karen mentioned included study of content. Overall, Karen's experience seems to confirm Wilson and Sykes' (1992) assertion:

> History is a living discipline and the cultivation of the historical imagination requires steady nourishment. ... As teachers advance in their careers, opportunities to continue the study of history and of history teaching are relatively infrequent and informal (p. 278-79)

While maintaining the importance of teacher subject matter knowledge, this raises awareness of the fact that general pedagogical knowledge could play a major role in helping teachers make significant instructional changes. Karen and Laurie generated subject-specific pedagogical knowledge rather than having such knowledge presented to them. Unfortunately, there are only a handful of studies that explore the influence of educational psychology on teacher knowledge at either the undergraduate or graduate level, not to mention within the context of staff development.

Darling-Hammond and McLaughlin (1995) see the development of teachers'

knowledge bases as the focus of staff development programs for the new visions of teaching:

> Because teaching for understanding relies on teachers' abilities to see complex subject matter from the perspectives of diverse students, the know-how necessary to make this vision of practice a reality cannot be prepackaged or conveyed by means of traditional top-down "teacher training" strategies. ... Professional development today means providing occasions for teachers to reflect critically on their practice and to fashion new knowledge and beliefs about content, pedagogy, and learning. (p. 597)

**Karen's Teaching**

Karen admits to not reading much in the social studies journals anymore. I'm sure the continued dispute over history standards just reinforces her beliefs that most social studies educators are more concerned about content than children. However, using her knowledge about learning and thinking, combined with her subject matter knowledge, she has developed an approach to instruction that certainly has some of the characteristics of the visions of teaching recommended by the NCSS (1993), Brophy (1990), and Newmann (1990a, 1990b) reviewed in an earlier chapter.

Two characteristics seem most prominent. First, Karen's instruction is focused on a relatively small number of major ideas or themes throughout the course and within any particular unit. Secondly, her instruction emphasizes student processing of information and she pays explicit attention to students' development of thinking strategies.

While Karen's approach has been successful in the past, she is now experiencing disappointment with the results of her teaching. Even though the activities are designed to help students become active processors of social studies content, if the desire isn't there on students' parts, they will not be

engaged enough to process thoughtfully.

Karen is currently struggling to figure out how to hook students. She wants them to ask their own questions, to be curious about doing their own research. The reality is that most of her students don't care about history. Even the students who are highly motivated, are rarely motivated by an interest in history. It's more likely they are motivated to be good students and get good grades. Karen's dilemma now is to figure out how history can be made more meaningful to her students. This may be an area in which reading in the social studies journals may prove helpful to Karen.

At our joint interview, Laurie raised the notion of topical versus chronological teaching in history. Karen finds this idea disturbing in some ways because the chronology of history is an important organizer. However, if students can get hooked on history, and begin to be truly engaged in the processing of content, by studying topics such as revolution, cultural conflict, peace, and so forth, then perhaps the organizing framework of history as chronology is less important. Such topical study, and more interdisciplinary planning and teaching, may increase the meaningfulness significantly.

**New Visions of Social Studies Instruction**

The new vision of teaching requires that teachers see themselves in a new role - not as givers of information but as facilitators of student thinking. This new vision of teaching also requires a new role for students - not as passive consumers of information but as active inquirers. This role may not meet students' expectations, particularly at the middle school and high school levels where evaluation becomes more important and risk-taking more risky. While we are continuing to develop more pictures of what reformed social studies

teaching may look like, we also need to develop a more thorough understanding of what reformed teaching means for students, particularly as students coming into the schools continue to change in their preparedness for learning.

## Final Thoughts

What I have learned about Karen's professional development, her knowledge, and her history instruction has informed me. I have a better understanding of the factors that might influence teacher development, a better understanding of the complexities of teacher knowledge and how one transforms subject matter for learners, and a better understanding of the realities of trying to engage young people in learning about history. I also have a better understanding of what it means to be a teacher who continues to grow and develop over a lengthy career, and in that way, Karen has inspired me. Her work embodies a life in teaching as described by Ayers (1993):

> A life in teaching is a stitch-together affair, a crazy quilt of odd pieces and scrounged materials, equal part invention and imposition. To make a life in teaching is largely to find your own way, to follow this or that thread, to work until your fingers ache, your mind feels as if it will unravel, and your eyes give out, and to make mistakes and then rework large pieces. It is sometimes tedious and demanding, confusing and uncertain, and yet it is as often creative and dazzling: Surprising splashes of color can suddenly appear at its center; unexpected patterns can emerge and lend the whole affair a sense of grace and purpose and possibility. (Ayers, 1993, p. 1)

# APPENDICES

# APPENDIX A

## APPENDIX A

### Interview Protocols

These are the questions that guided the interviews, but generally, the discussion was much more open-ended as opposed to structured.

**Course Interviews**

Beginning of Study

What do you see as the reasons for studying social studies in middle school? for studying US History? What are your thoughts on the separation of the social science disciplines from grades 7-12?
What are your goals for your students? What do you think makes US History difficult for students? What areas do they seem to have problems with? What could make the study of US History easier for students?
What are the main topics covered in your courses? How are the courses organized?
Using your calendars and the previous syllabus, would you walk me through your classes explaining your planning decisions as much as possible? Could you point out any changes you made and why? (Throughout this exchange, probe for sources of information used in planning decisions, e.g., the role of district curriculum guides, the role of the textbook, etc.)

Conclusion of Study

Now that the school year is over, I'm interested in hearing your reflections on your planning and teaching for this year. What are your overall impressions?
As you think about the units in your courses from this year, what are your thoughts about the need for change? Why do you say so?
For each of the resources I shared with you, I'd be interested in knowing your feelings about whether the materials would be appropriate or useful for your teaching, and why or why not.
What are your initial thoughts about teaching 9th grade history?

**Unit Interviews**

Interview Before Unit

What concepts/skills are you teaching in this unit and why?
What materials/resources will be used in the unit? How did you find these materials?
How did you select/design these activities for students?
Tell me about the students in your classes.
How will students be assessed during and after the unit?

# APPENDIX A

Interviews During Unit

What went well/didn't go well in this lesson/this week? Why do you say so? Is that important to you? Why?
Will you make/have you made adjustments to your original plan?
What are your plans for upcoming lessons?

Interview After Unit

What do you think the students learned from the unit?
What went well in this unit and what didn't? Why do you say so?
What would you do next time in a similar way? What would you change? how and why?
Explain the major differences you saw between the two classes.

**Professional Interviews**

First Professional Interview

When do you believe you made the decision to teach? to teach social studies?
How would you describe your liberal arts preparation in the social sciences? What areas did you concentrate on? Was history your specialization? Did you feel prepared to teach all the social sciences included in social studies?
Tell me about some of the more important courses or projects you completed as an undergraduate.
Do you remember any specific reactions to what you were learning in your teacher education program?
Do you remember what struck you as most important/least important in your teacher preparation?
During student teaching, how would you describe your methods of planning? What resources did you use? How did you interact with students?
What were the big 'lessons' of that experience for you?

Second Professional Interview

What is the story of landing your first teaching position?
What do you remember as the greatest successes and the biggest disappointments of your first few years of teaching?
To what sources did you turn for information about curriculum decisions? (clarify role of other teachers, professional organizations, educational research, staff development, principals)
You've mentioned before that you considered leaving teaching. Can you describe why this was a consideration of yours? What were you doing/feeling at the time?

# APPENDIX A

Third Professional Interview (conducted with Karen's colleague)

How did you two meet? What were your interactions like at first?
How did your relationship develop?
In as much detail as possible, describe what happened during your planning sessions.
Specifically, how did your teaching change and why did these changes happen?

Final Professional Interview

How is the planning you do now different from what you've done with Laurie?
When you picture your classroom several years from now, what's different from your classroom now? How is your teaching different? Why do you think these things may happen?

# APPENDIX B

**APPENDIX B**

**Scope and Sequence of 8th Grade US History**


# SCOPE and SEQUENCE 8TH GRADE U.S. HISTORY

APPENDIX B

# UNIT THEME/ORGANIZING CONCEPT

UNIT I: COLONIZATION (Text: Chapters 3 & 4)

# KEY CONCEPTS & GENERALIZATIONS

| | |
|---|---|
| CULTURE | Native Americans and Europeans had different values and beliefs.<br>Cultural differences created conflict between cultures. |
| REGIONS | Geographic conditions varied among the English colonies.<br>Geographic characteristics influenced the economic choices that the colonists made. |
| RELIGION | Religious beliefs influenced many European colonizers.<br>Religious conflict in Europe caused many people to immigrate to the colonies. |

# LEARNING ACTIVITIES

Students will practice using their text to locate different kinds of information.

Students will organize their notebooks to reflect the organization of the course for 1st Semester.

Students will be accountable for using time management skills to complete all assignments on time. Students will be expected to use their school assignment books to plan their study time outside of school.

Teachers will model SQ3R. Notetaking skills will be reviewed and reenforced as part of the SQ3R process. Students will practice SQ3R as they work in teams to conduct in-depth research on one of the English colonies.

Students will share the information which they have gathered and organized with their classmates.

Students will compete a Venn Diagram organizing information the English colonies according to regional patterns. They will use these diagrams to evaluate the accuracy of generalizations about English colonization.

Students will be tested on their knowledge of patterns in English colonization.

APPENDIX B

# UNIT THEME/ORGANIZING CONCEPT

UNIT II: REVOLUTION (Text: Chapters 5 & 6)

# KEY CONCEPTS & GENERALIZATIONS

| | |
|---|---|
| AUTHORITY | The British colonies were subject to rule by the King and Parliament.<br>British laws restricted colonial trade.<br>The colonies adopted the Declaration of Independence to explain their rebellion against British authority. |
| INDIVIDUAL RIGHTS | The colonists thought England violated their rights as English people.<br>The colonists believed they had a right to rebel because England did not protect their rights. |
| WARFARE | The English had to invade and conquer the colonies to accomplish their goal of ending the rebellion.<br>The Americans, with aid from France and other European nations, won recognition as an independent country. |

# LEARNING ACTIVITIES

Students will be accountable for using their assignment books to practice good time management skills.

Students will explore the meaning of authority by identifying examples of authority and power without authority.

Students will analyze case studies involving the violation of individual rights.

Students will identify the goals and strategies of each side in the War for Independence and use these statements of goals and strategies to evaluate the strengths and weaknesses of each side during the war.

Students will organize information about the War for Independence to identify patterns in when and where the battles were fought.

Students will make judgments about why the Americans were able to win the war for independence.

**APPENDIX B**

# UNIT THEME/ORGANIZING CONCEPT

UNIT III: INDEPENDENCE (Text: Chapters 7 & 8)

# KEY CONCEPTS & GENERALIZATIONS

| | |
|---|---|
| THE RULE OF LAW | The 13 states adopted the Articles of Confederation during the War for Independence.<br>The national government under the Articles of Confederation was too weak to solve the political or economic problems.<br>The Congress called for a convention of delegates from the states to revise or amend the Articles of Confederation. |
| COMPROMISE | Delegates from 12 states compromised to write a new constitution.<br>The Constitution created a federal system of government to replace the Confederation. |
| RATIFICATION | Each state held a convention to debate the new Constitution.<br>After several months and much debate, the new Constitution was ratified by conventions in all 13 states. |

# LEARNING ACTIVITIES

Students will review sources of authority and analyze the Declaration of Independence and its philosophy of constitutional democracy.

Students will examine the compromises which were made at the Constitutional Convention to identify the two sides on each issue. They will identify what each side received and gave up in each compromise.

Students will compare and contrast the Articles of Confederation and the Constitution.

Given a list of statements, students will identify the speakers as Federalists or Anti-Federalists.

## APPENDIX B

# UNIT THEME/ORGANIZING CONCEPT

UNIT IV: NATIONALISM (Text: Chapters 9 & 10)

# KEY CONCEPTS & GENERALIZATIONS

| | |
|---|---|
| POLITICAL PARTIES | Americans disagreed about how to interpret the Constitution.<br>Conflict developed over the relationship between the states and the nation. |
| NEUTRALITY | The United States tried to remain neutral in foreign affairs.<br>European nations were disrespectful to the United States.<br>The U.S. fought the War of 1812 to win respect. |
| UNITY | The War of 1812 created a sense of national pride.<br>Political disagreements subsided temporarily. |

# LEARNING ACTIVITIES

Students will organize the ideas of Hamilton and Jefferson on a Venn Diagram and use these diagrams to identify the political parties of people making statements about issues.

Given a list of events, students will classify them according to whether they would increase or decrease feelings of nationalism.

Given a list of events, students will evaluate each event as evidence of a growing spirit of nationalism.

**APPENDIX B**

# UNIT THEME/ORGANIZING CONCEPT

UNIT V: CHANGE (Text: Chapters 11 & 12)

# KEY CONCEPTS & GENERALIZATIONS

| | |
|---|---|
| INDUSTRIAL REVOLUTION | Loss of trade during the War of 1812 caused the growth of manufacturing in the United States.<br>New technology led to the creation of new industries.<br>New technology caused changes in methods of transportation.<br>New technology brought changes in farming techniques. |
| DEMOCRACY | Western states tended to allow more people to participate in government than the original states.<br>New ways developed for people to influence the selection of leaders. |
| POPULATION CHANGE | A very high birthrate and immigration caused the U.S. population to grow rapidly.<br>The creation of new industries and related jobs caused the urban population to grow more rapidly than the rural population. |
| SECTIONALISM | Changes in the economy created political tensions between regions of the United States.<br>Population shifts affected the political divisions in Congress. |

# LEARNING ACTIVITIES

Students will classify events according to whether they would encourage or discourage industrialization.

Students will evaluate changes resulting from industrialization.

Students will analyze graphs and charts of population statistics and evaluate generalizations about population growth for accuracy.

Students will use a computer data base to identify patterns of change in voting qualifications and methods of choosing presidential electors. They will evaluate generalizations about the growth of democracy in the United States.

**APPENDIX B**

# UNIT THEME/ORGANIZING CONCEPT

UNIT VI: EXPANSION (Text: Chapter 14)

# KEY CONCEPTS & GENERALIZATIONS

| | |
|---|---|
| PIONEER | Many Americans moved west seeking better or cheaper land.<br>There were many hazards involved in moving west. |
| FRONTIER | Life on the edge of settlement was different from lifestyles in settled areas.<br>The frontier was continually shifting. |
| MANIFEST DESTINY | The United States acquired new territories by a variety of means.<br>These new territories were settled and organized and admitted to the Union as states.<br>Cultural conflicts increased between Native American people and other Americans as the population spread westward.<br>Westward expansion created tensions with neighbors of the United States. |

# LEARNING ACTIVITIES

Students will use a computer simulation to identify risks and hazards to moving West in a wagon train on the Oregon Trail.

Students will label territorial acquisitions on a laminated map and use the map to describe patterns and make generalizations about territorial expansion.

Students will analyze graphs of population growth by regions and evaluate generalizations about population growth for accuracy.

Students will research different points of view in preparation to debating the question "Should the U.S. go to war against Mexico?"

Given a list of descriptive statements, students will identify the territory being described.

**APPENDIX B**

# UNIT THEME/ORGANIZING CONCEPT

UNIT VII: DIVISION (Text: Chapters 15 & 16)

# KEY CONCEPTS & GENERALIZATIONS

| | |
|---|---|
| SLAVERY | The institution of chattel slavery in one section of the country made political disagreements emotional issues.<br>Slavery was an economic and social institution in the southern states.<br>Political disagreements became more difficult to resolve as new states were added to the United States. |
| STATES' RIGHTS | Disagreements over the role of states in a federal system became more divisive as the population of the North grew faster than the southern population. |
| UNION | The Civil War was fought to preserve the United States as one nation.<br>The northern states possessed more resources for fighting than the southern states.<br>The Union forces prevailed |

# LEARNING ACTIVITIES

Given a list of generalizations about slavery, students will evaluate the accuracy of each statement based upon what they already "know." Then students will be asked to evaluate each statement for accuracy a second time using statistical evidence. They will compare their original answers with their later answers to identify the ideas they have to change in their own minds.

Students will compare and contrast the Missouri Compromise, the Compromise of 1850 and the Kansas-Nebraska Act of 1854.

Given a series of four names of people or events, students will be asked to choose three that go together in some way and to explain the connection between the three.

Given another list of people and terms, students will be asked to decide in which part of the country each would be most popular and to explain their choice.

Students will compare and contrast the Union and the Confederacy.

# APPENDIX C

# APPENDIX C

## Sample Quizzes from the Unit on Change

US HISTORY QUIZ
CHANGES IN MANUFACTURING AND FARMING

Choose the BEST ending for each of the following statements.

1. The Industrial Revolution began during the
   A. 1800s. B. 1700s.

2. The Industrial Revolution began in
   A. Great Britain. B. the United States.

3. Samuel Slater came to the United States during the Presidency of
   A. James Monroe. B. George Washington.

4. When he came to the U.S., Samuel Slater introduced the technology for manufacturing
   A. thread. B. cloth.

5. Francis Cabot Lowell built the 1st factory which
   A. made fiber into yarn. B. made fiber into cloth.

6. Cotton growers usually moved their product to market by
   A. rivers. B. canals and lakes.

7. Most of the textile mills were located in
   A. the South. B. the West. C. the Northeast.

8. Wool fiber for the textile industry was produced in
   A. the South. B. the West. C. the Northeast.

9. The cotton gin was a machine which
   A. manufactured cotton thread. B. cleaned cotton fiber.

10. The first type of production to become industrialized was
    A. the manufacturing of cloth. B. the manufacturing of guns.

MATCH each of these men with the BEST description.

A. JOHN DEERE
B. CYRUS MC CORMICK
C. ELKANAH WATSON
D. ELI WHITNEY
E. JETHRO WOOD

11. He manufactured a steel plow which was sharp enough to cut through prairie sod.
12. He developed a cast-iron plow based on the idea of interchangeable parts.
13. He invented a mechanical reaper for harvesting grain more efficiently.
14. He developed the technology of manufacturing interchangeable parts for assembling muskets.
15. He introduced agricultural fairs to help farmers improve their methods of farming.

# APPENDIX C

## U.S. HISTORY QUIZ: THE AGE OF JACKSON

FORCED-CHOICE: Choose the best answer to complete each of the following statements.

1. President Jackson increased the power of the President by
   A. refusing to enforce a Supreme Court decision which he didn't like.
   B. appointing his supporters to Cabinet positions.

2. President Jackson "killed" the Bank of the United States by
   A. vetoing the bill to recharter it.
   B. removing government deposits from the Bank.

3. After the Bank of the United States closed, local banks began to
   A. make loans without having specie to redeem their notes.
   B. refuse to make loans to business people.

4. The Depression of 1837 began with a panic which was
   A. bankers refusing to make loans.
   B. people demanding gold or silver for their bank notes.

5. President Jackson issued the Specie Circular to
   A. slow down the sale of land to speculators.
   B. increase loans to businesses.

/OCABULARY/MATCHING:

| | |
|---|---|
| A. SECESSION | D. SPECIE |
| B. SPOILS SYSTEM | E. STATES' RIGHTS |
| C. SUFFRAGE | |

6. A state overrules an Act of the United States Congress.

7. A candidate rewards his supporters with government jobs.

8. A state withdraws from the United States.

9. A person is able to vote in an election.

10. A coin made out of precious metals like gold or silver.

DISCRIMINATION: A = Accurate B = Inaccurate

11. Many more people were eligible to vote in 1840 than in 1828.

12. President Jackson thought the Bank of the United States was constitutional.

13. President Jackson supported states' rights.

14. The Whig party supported the national bank.

5. The amount of currency in circulation increased after the Bank of the United States closed.

# APPENDIX C

## U.S. HISTORY QUIZ: JACKSONIAN DEMOCRACY

Choose the BEST answer to complete each of the following.

1. John Quincy Adams was elected President in 1824 by
   A. the voters.
   B. presidential electors.
   C. the U.S. House of Representatives.

2. When Jackson was elected, most presidential electors were chosen by
   A. state legislatures. B. the voters.

3. By the end of Jackson's presidency, white male suffrage was common
   A. east of the Appalachian Mts. B. west of the Appalachian Mts.

4. A political party platform is
   A. a nominating convention.
   B. a statement of positions on issues.

5. Andrew Jackson introduced the "spoils system" when he
   A. replaced government workers with his political supporters.
   B. invited his supporters to celebrate his election at the White House.

6. Osceola was a leader of the
   A. Cherokee Indians. B. Seminole Indians.

7. The Force Bill was a federal law which
   A. gave the President authority to force Indian tribes to move.
   B. gave the President authority to use U.S. soldiers to enforce federal laws.

8. The Supreme Court under John Marshall
   A. supported the Indian Removal Act.
   B. opposed the Indian Removal Act.

9. President Jackson and Vice President Calhoun
   A. agreed on the issue of nullification.
   B. took opposite sides on the issue of nullification.

10. President Jackson's supporters called themselves
    A. Republicans. B. Democrats.

DISCRIMINATION: A = Accurate B = Inaccurate.

11. Universal suffrage became common during Jackson's administration.

12. President Jackson enforced the Supreme Court's decision on the Indian Removal Act.

13. More people became eligible to vote in presidential elections during Jackson's presidency.

14. All of the states in the South favored nullification in 1832.

15. South Carolina threatened to leave the United States if President Jackson tried to enforce the tariff laws in South Carolina.

# APPENDIX D

## APPENDIX D

### Sample Focus Activities from the Unit on Change

### THE GROWTH OF INDUSTRY

For each of the characteristics listed below, decide whether it would encourage Americans to start industries or discourage such action. Explain your choice in the lines below.

_____ 1. Abundant land

_____

_____ 2. Scarce labor

_____

_____ 3. Abundant, undeveloped resources

_____

_____ 4. Construction of the Erie Canal

_____

_____ 5. British investment in America

_____

_____ 6. Increasing commercial farming

_____

_____ 7. Immigration

_____

_____ 8. British competition in manufacturing

_____

_____ 9. Construction of the National Road

_____

_____ 10. Tax-supported schools

_____

_____ 11. The Embargo Act

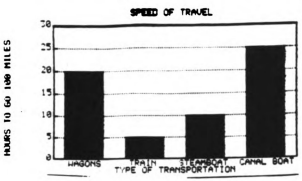
_____

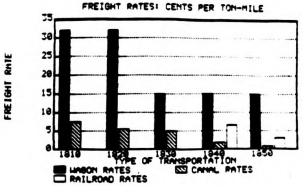
_____ 12. The War of 1812

_____

# APPENDIX D

## TRANSPORTATION CHANGES




**Compare and contrast the following methods of transporting people and goods using your notes and the graphs above.**

| METHOD | ADVANTAGES | DISADVANTAGES |
|---|---|---|
| Wagons on Roads | | |
| Canal Boats | | |
| Steamboats on lakes & rivers | | |
| Railroads | | |

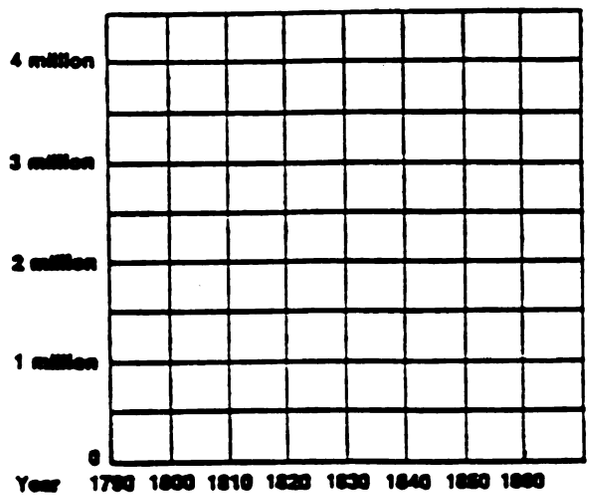
# APPENDIX D

## COTTON IS KING

I. Using the figures in the tables below, make a line graph which shows the production of cotton fiber and the slave population in the U.S. for the years 1790 - 1860. Label each line on the graph.

| Year | Number of Cotton Bales Produced in United States |
|---|---|
| 1790 | 3,000 |
| 1800 | 73,000 |
| 1810 | 178,000 |
| 1820 | 335,000 |
| 1830 | 732,000 |
| 1840 | 1,348,000 |
| 1850 | 2,136,000 |
| 1860 | 3,841,000 |

| Year | Number of Slaves in United States |
|---|---|
| 1790 | 697,681 |
| 1800 | 893,602 |
| 1810 | 1,191,362 |
| 1820 | 1,538,022 |
| 1830 | 2,009,043 |
| 1840 | 2,487,355 |
| 1850 | 3,204,313 |
| 1860 | 3,953,760 |




II. Identify the information shown in the graph.

Write two sentences which describe what you can learn by studying this graph.

# APPENDIX D

III. Practice reading the graph.

A. Identify the decade during which cotton production increased the most.

_____

B. During which decade did the slave population grow the most?

_____

C. What was the population of slaves in 1860?

_____

IV. Look for relationships.

Using the tables or the graph, decide whether each of the statements below is accurate (+) or inaccurate (0).

_____ Both cotton production and the number of slaves increased each year between 1790 and 1860.

_____ In 1840 there was one bale of cotton produced for each slave in the nation.

_____ Cotton production doubled between 1840 and 1860.

_____ The number of slaves in the United States more than doubled between 1800 and 1820.

Write a sentence which describes the growth of the slave population in relation to the growth of cotton production.

_____

_____

_____

V. Draw Conclusions.

A. Identify historical events which might have influenced the production of cotton as illustrated in this graph.

_____

_____

_____

B. Identify historical events or trends which might have influenced the growth of the slave population as shown on this graph.

_____

_____

APPENDIX D

DATE: _____ NAME: _____

# THE U.S. BECOMES MORE DEMOCRATIC

Each of these maps represents a different election year. Use your pencil to make symbols like dots or lines to show how the presidential electors were chosen in each state in each election year. Use your colored pencils or markers to show what the voting qualifications were in each state in each election year. The data base will give you the information you need to complete your maps.



## MAP KEY

ELECTORS CHOSEN

- ☐ State legislature
- ☐ Popular vote at large
- ☐ Popular vote by district

VOTING QUALIFICATIONS

- ☐ Taxpayers
- ☐ White Taxpayers
- ☐ Property owners
- ☐ White property owners
- ☐ Adult male residents
- ☐ White male adult residents

# APPENDIX D

AT ISSUE: SECTIONAL INTERESTS

In the election of 1828, several issues were identified which ended the national unity which existed after the War of 1812. These issues are stated below. Under each issue there are opinions expressed about that issue. Identify the section of the country from which you think the speaker comes based upon what you have read. Use the following key:

NE = the northeast. W = the west S = the south.

**Should the national government pass a protective tariff?** (Tariff)

_____ "How can our factories make a profit when Americans keep buying these cheap imports? Put a high tax on them so people will buy the goods we make here at home!"

_____ "Why should we pay a high tax on products we want to buy? We don't need protection! We depend on being able to sell our cotton to Britain and our sales will be hurt if Britain can't sell her products here."

_____ "The protective tariff will help manufacturing which will cause cities to grow. These cities need our food products, therefore, we should support this tax."

**Should the national government pay for roads and canals?** (Internal Improvements)

_____ "We must have roads and canals to move our manufactured goods to our customers. Realistically, the federal government is the only body with the necessary resources to build these roads and canals. We must all contribute to the cost of these internal improvements for the benefit of all."

_____ "Use federal money for roads and canals? Never! Why should I pay for something I will never use? Our plantations are located on rivers which meet our transportation needs. These improvements are not necessary to me."

_____ "Without roads and canals we are isolated. We cannot get our farm products to market and we certainly don't have the resources to build them ourselves. We need the help of the more developed parts of the country to build these necessary improvements. Our states simply don't have the necessary resources to build them."

**Should the state governments be able to overrule the national government?** (States' Rights)

_____ "No section of the country has the right to pass a law which will hurt others. A state can do what it wants, no matter what the federal government says. After all, the states were here first and the states are more important than the union of states."

_____ "If individual states can assert their interests over the national interest by nullifying national laws, we will never be one nation. Our ability to trade across state borders depends on national unity. We cannot have states' rights."

# APPENDIX D

SUMMARY

Complete the following chart by referring to your answers in the first part of the assignment. Put a plus sign (+) if the region supported the issue and a minus sign (-) if it opposed the issue. In the last column, give a reason for each region's position based on your interpretation of the earlier quotations.

| ISSUE | POSITION | REASON |
|---|---|---|
| THE PROTECTIVE TARIFF | NE<br>S<br>W | |
| INTERNAL IMPROVEMENTS | NE<br>S<br>W | |
| STATES' RIGHTS | NE<br>S<br>W | |

# LIST OF REFERENCES

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