# Using Educative Curriculum Materials and Practice-Based Professional Development for Teacher Uptake of Historical Inquiry in Elementary Classrooms

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A Capstone Project

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by

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## Abstract

In recent years, numerous states have revised social studies standards documents to incorporate the various elements of the National Council for the Social Studies' C3 Framework for College, Career, and Citizenship. In Massachusetts, the 2018 revised framework included a series of *History & Social Science Practice Standards* that emphasize how students should engage in history education, including the use of historical inquiry practices. A review of the literature suggests that the uptake of historical inquiry, particularly in the elementary grades, is not commonplace in most history classrooms. Using Ball and Cohen's (1996, 1999) frameworks for practice-based professional development and curricular materials for instructional reform, I conducted a qualitative case study of two fifth-grade teachers from one district in Massachusetts to understand how the use of educative curriculum materials and curriculum-based professional development could foster teacher uptake of historical inquiry. Data from semi-structured interviews, field notes from professional development, and classroom observation data were analyzed to investigate whether these elements fostered uptake of historical inquiry. Findings suggest that each of the aspects of the program impacted the uptake of historical inquiry in varying ways. Based on these findings and implications, recommendations for the district where the study was situated are also provided.



*Keywords:* historical inquiry, educative curriculum materials, practice-based professional development, elementary social studies

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APPROVAL OF THE CAPSTONE

This capstone, "Using Educative Curriculum Materials and Practice-Based Professional Development for Teacher Uptake of Historical Inquiry in Elementary Classrooms", has been approved by the Graduate Faculty of the School of Education and Human Development in partial fulfillment of the requirements for the degree of Doctor of Education.

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To Liam and Christine – you are my world.

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## Chapter 1: Introduction

Over the past 20 years, the field of history education has prioritized a constructivist approach to the subject in K-12 settings, promoting the idea of historical thinking – a focus on the disciplinary and procedural knowledge of the field (Wineburg, 2001) – which has permeated recent state standards revision efforts. The National Council for the Social Studies (NCSS) published the *College, Career and Civic Life (C3) Framework for Social Studies State Standards* (NCSS, 2013), which lays out a vision for curriculum standards that prioritize inquiry within, and sometimes across, the disciplines of history, civics, economics, and geography. The goal of this document was to inform future state standards revision efforts to focus not only on the content knowledge of each discipline within social studies, but to also emphasize disciplinary thinking and inquiry-based learning (NCSS, 2013). Since the publication of the C3 framework, at least 23 states have revised their standards to adopt elements of the C3 framework in some shape or form (Hansen et al., 2018).

In 2018, the Massachusetts Board of Elementary and Secondary Education voted to adopt a new set of standards for social studies, *The 2018 Massachusetts History & Social Science Framework*, which was the first update to the standards in nearly 15 years. This framework features a set of *History and Social Science (HSS) Practice Standards* (Appendix A) which is a departure from previous iterations of the state's history and social science standards in that there is equal emphasis on content knowledge and historical inquiry (Massachusetts Department of Elementary and Secondary Education (DESE), 2018). These practice standards are essential for ensuring that social studies education is an active learning experience and not the passive transfer of rote information.

However, simply defining and promoting a pedagogical framework does not guarantee that it will be adopted with fidelity or ease by classroom educators (Spillane et al., 2002). Though Massachusetts social studies educators are expected to implement historical inquiry in their classrooms through the utilization of the *HSS Practice Standards*, research suggests that inquiry-based history and social science is not the prevailing method of instruction (Fogo, 2014; Saye, 2017). Moreover, the literature regarding inquiry and social studies broadly suggests these practices are even more scarce in the elementary grades (Heafner et al., 2014; Heafner & Fitchett, 2012). In Massachusetts specifically, one study found that only 27.5% of elementary teachers surveyed understood how the state's framework and *History and Social Science Practice Standards* could influence instruction (Tichnor-Wagner et al., 2020).

The challenges regarding historical inquiry at the elementary level also present within one particular school district in Massachusetts – the Bradford Public Schools[1] – where I serve as the K-12 Social Studies Coordinator. At the district level, the implementation of the *HSS Practice Standards* in the Bradford Public Schools has been difficult for elementary social studies teachers. Observational data showed that teachers continued to use instructional practices that are more didactic, with little observed use of inquiry questions or student-centered learning with disciplinary sources. Further, professional learning opportunities specifically focused on historical inquiry in social studies have been few and far between for elementary educators in the district; often consisting as optional yearly one-off sessions. When educators attended such professional development, session feedback from teachers indicated that they were amenable to the notion of an inquiry-based approach, but they desire more curricular resources and modeling

[1] A pseudonym.

of the practices. As such, there was a timely and pressing need to investigate ways to promote teacher uptake of disciplined literacy in our elementary social studies classrooms.

## Conceptual Framework

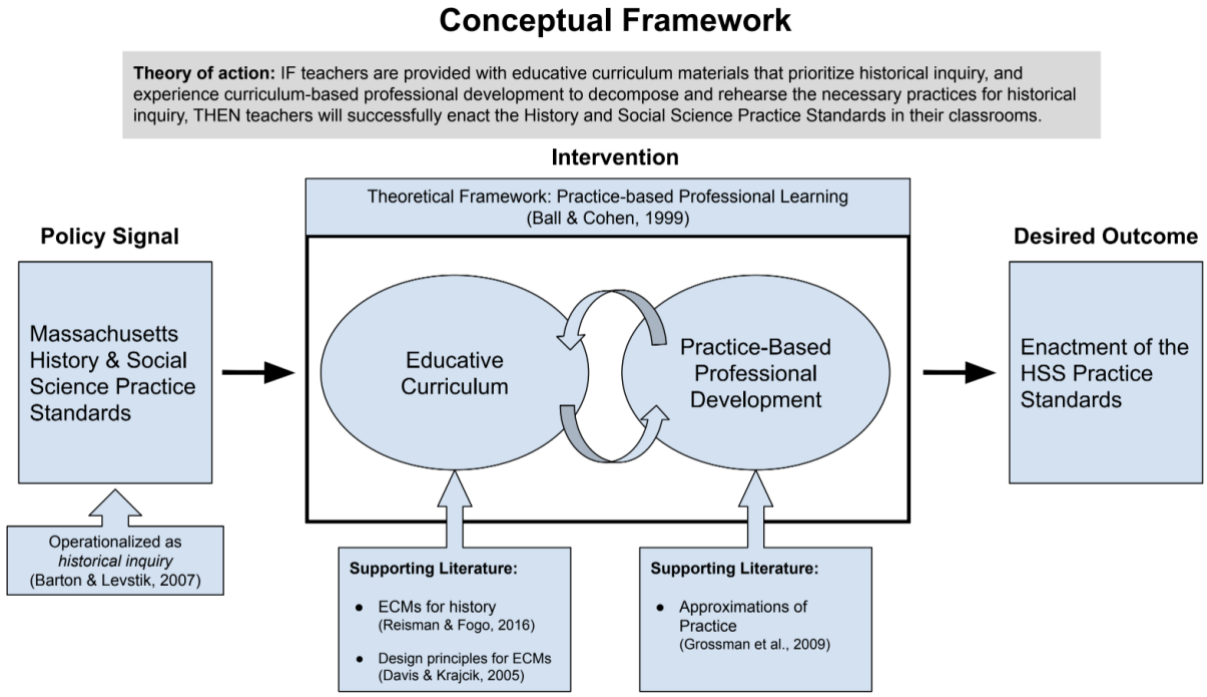
According to Grant and Osanloo (2014), a conceptual framework "offers a logical structure of connected concepts that help provide a picture or visual display of how ideas in a study relate to one another" (p. 17). In this section, I provide a theoretical underpinning to this capstone, describe the context of the study, and explain how the various elements of the study are situated in the literature.

### *Aspects of the Capstone*

Beginning with the previously articulated problem of practice in mind, the goal of this proposed study was to consider how to best support teachers in the upper elementary grades to employ the Massachusetts *History and Social Science (HSS) Practice Standards* in the classroom. To address the problem of practice, I designed, administered, and evaluated a curriculum-based professional learning experience that focused on developing educators' capacity to employ the *History and Social Science Practice Standards* in a fifth-grade history class. The theory of action guiding this proposal was that if teachers were provided with educative curriculum and practice-based professional development that prioritized the elements of the *HSS Practice Standards*, then teachers would successfully enact the practices within their classroom lessons and units of learning.

**Figure 1**

*Conceptual Framework*

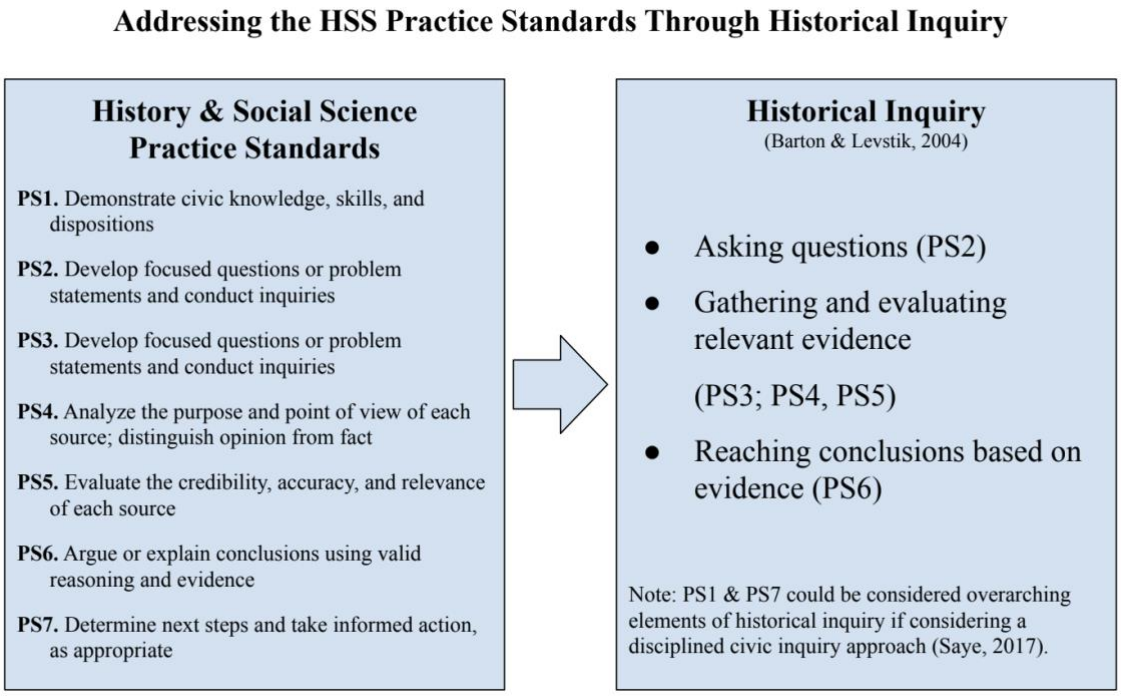



### *Operationalizing the HSS Practice Standards*

The Massachusetts *History and Social Science Practice Standards* are numerous and quite broad and are not in and of themselves a cohesive model for history instruction. In fact, prior work with elementary social studies teachers indicated that teachers had some difficulty in making sense of the *HSS Practice Standards* outright. In an effort to make the *HSS Practice Standards* more accessible to teachers, I operationalized them through Barton and Levstik's (2004) definition of *historical inquiry*, which involves "asking questions, gathering and evaluating relevant evidence, and reaching conclusions based on the evidence" (p. 188). Figure 2 demonstrates how the *HSS Practice Standards* can be translated into a form of historical inquiry.

**Figure 2**

*Operationalizing the History and Social Science Practice Standards*




### *Practice-Based Professional Development*

Within a conceptual framework, a theoretical framework "further connects the researcher's perspectives, the specific study focus, and the larger scholarly or public conversations about aspects of the phenomenon" (Rallis, 2018, p.3). The overarching theoretical framework that informed this study was Ball and Cohen's (1999) framework for practice-oriented professional learning. Rather than engaging in traditional, didactic approaches to professional development, Ball and Cohen called for a model of professional learning that is situated in the everyday work of the teacher and the instructional practices that reformers wish to see in the classroom. Particularly, Ball and Cohen delineate three aspects that should be present in professional education for professional learning: (1) professionals need experience with the

tasks and ways of thinking that are fundamental to the practice; (2) professional learning should be centered in the critical activities of the profession; (3) professional learning should include substantial professional discourse and engagement in communities of practice (Ball & Cohen, 1999). Each of these elements were present in the conceptual framework of this study.

**Experience With Tasks and Ways of Thinking.** Ball and Cohen (1999) believe that educators "need experience with the tasks and ways of thinking that are fundamental to the practice" (p. 12). In the context of this capstone and related problem of practice, the tasks and ways of thinking were the *History and Social Science Practice Standards*. Rather than passive transmission of these practices via the state framework, a sound professional learning experience is one where teachers engage with these practices themselves as the primary way of professional learning. This happens primarily in the curriculum-based professional development experience whereby participants engage in the tasks of the inquiry module that students will experience as a way of learning how to effectively teach these practices in the classroom.

**Centering the Critical Activities of the Profession.** Ball and Cohen (1999) advocate for professional learning that is centered in practice, including the use of materials and work that depict what should take place in the classroom. This informs the professional development aspect of this study, which is based on an actual unit of learning to be utilized by the participants in their respective classrooms. All the work of the participants during the professional development (PD) phase of this study was based in this unit of learning so that the learning experiences, meaning making by participants, and insights gleaned from the professional development experience were all directly applicable to what teachers would be doing with their students following the PD.

**Communities of Practice.** Among many benefits of situating professional learning within communities of practice was that doing so "works to convert practice from a process of private trial and error and implementation to a more publicly deliberative process of inquiry and experiment" (Ball & Cohen, 1999, p. 19). Further, utilizing a communities of practice approach grounds the conversation in ways that traditional one-off PD cannot. As previously mentioned, professional development regarding elementary level social studies in the district studied had only existed as individual in-service sessions, merely scratching the surface of general concepts with little or no follow up. For this study, the professional development process was intentionally designed to foster a community of practice among participants who will engaged in sustained dialogue about the unit and featured practices during, between, and after the professional development sessions.

### *Educative Curriculum Materials*

To address the tangible challenge of high-quality instructional materials for elementary history education, I drew from the literature to develop an educative inquiry module for teachers to study within the professional development offering and use in their classrooms. Educative curriculum materials (ECMs) are curriculum materials that are designed to promote teacher learning (Davis & Krajcik, 2005). Drawing from Ball and Cohen's (1996) concept of curriculum as a means for professional learning, Davis and Krajcik (2005) have established five guidelines for designing ECMs: (1) helping teachers anticipate what learners might think or do in instructional activities; (2) support teachers' understanding of the subject matter; (3) help teachers make connections across units; (4) make visible the developers' pedagogical judgements; (5) promote the teachers' capacity of make effective modifications and adjustments (Davis & Krajcik, 2005). Given the lack of depth in both content knowledge and pedagogical

content knowledge of history for elementary educators, Davis and Krajcik's (2005) framework makes for a compelling opportunity to leverage curriculum for successful implementation of the History and Social Science Practice Standards.

### *Approximations of Practice*

In their work calling for practice-based teacher education, Grossman et al. (2009) advocate for approximations of practice – simulating certain aspects of practice within a professional learning setting – as a way to build the skill of teachers in implementing desired instructional practices. Grossman et al. (2009) note that such intentional use of approximation is necessary because unstructured field experiences and observations can often reinforce the status quo instead of fostering the desired practice. While Grossman's framework is primarily focused on teacher education for pre-service educators, there is value in using these strategies in the in-service setting given that in-service teachers of grade five history teachers are generalists and have not likely entered the profession with a history degree (Thornton, 2001) and could benefit from developing discipline-specific practices through approximation. For this capstone, I designed the professional development sessions to feature intentional approximation and rehearsal opportunities where teachers could practice and debrief the *History and Social Science Practices* featured in the educative curriculum unit.

## Purpose of Study and Research Questions

Utilizing the conceptual framework to address the problem of practice, the purpose of this study was to investigate how the use of educative curriculum materials in tandem with practice-based professional development could support teacher uptake of the History and Social Science Practice Standards through historical inquiry. The study focused on two activities: a curriculum-based professional development workshop for grade five teachers that sought to support teachers

in the uptake of a historical inquiry unit, and teacher use of the unit itself, which features educative elements to assist the teacher during the execution of the unit in the classroom. By focusing on these two activities, this study allowed me to investigate whether and to what extent each of these elements support teacher uptake of historical inquiry and to also explore the possible interlocking nature of the two elements together. The study addressed the following research questions:

**RQ1:** In what ways, if any, does participation in curriculum-based professional development foster teacher uptake of historical inquiry, particularly:

a) Decomposition and modeling of practices during PD; and

b) Educative curriculum elements

**RQ2:** To what extent, if any, do the practices of historical inquiry transfer to the classroom?

**Significance of the Study**

By designing, implementing, and evaluating the use of educative curriculum materials and practice-based professional development for the update of historical inquiry in elementary history classrooms, this study supported efforts in the Bradford Public Schools to provide teachers with timely and valuable professional learning for history and social science. Further, studying the use of educative curriculum materials and practice-based professional development also supports professional learning in other disciplines as well. Broadly, this study is of interest to those in the field who wish to understand how such a program could be helpful at both the elementary level and for in-service settings, which are two areas where the literature is not as robust.

## Definition of Terms

In this section, I briefly define the key terms and concepts present throughout this capstone proposal.

### *Historical Inquiry*

Within the study of history, historical inquiry consists of "asking questions, gathering and evaluating relevant sources, and reaching conclusions based on that evidence" (Barton & Levstik, 2004, p. 188).

### *Disciplinary Literacy*

Disciplinary literacy is the way that one creates, communicates, and evaluates information in a particular discipline (Shanahan & Shanahan, 2012).

### *Historical Thinking*

Historical thinking is a way of engaging in disciplinary literacy for history using practices that historians employ when investigating and interpreting the past (Wineburg, 2001).

### *Teacher Uptake*

In this study, the term uptake refers to instances where teachers utilize practices, strategies, or teaching moves that foster any of elements within the aforementioned definition of historical inquiry.

### *Educative Curriculum Materials*

Educative curriculum materials (ECMs) are "curriculum materials designed to support teacher learning as well as student learning" (Davis & Krajcik, 2005). These materials are designed to guide teachers within their teaching of a unit of study. Educative features may include big ideas about the content, student-friendly definitions, anticipating student responses, connections to disciplinary practices, etc.

## Chapter 2: Literature Review

In this chapter, I review the relevant literature surrounding the problem of practice explained in Chapter 1. First, I examine the policy developments that drive the macro problem of practice regarding expectations for how history should be taught in the intermediate grades to frame the context of the remaining aspects of the review. Next, I give attention to the varying definitions of inquiry-based learning in the discipline of history for the purposes of reconciling a definition for my conceptual framework. I then present the literature attending to issues of curriculum and instruction in inquiry-based history classrooms, highlighting both persistent problems and areas of promise. Lastly, I review literature related to professional development; particularly with regards to the role that professional development structures play in developing teachers' ability to enact inquiry-based learning for history.

Though the micro problem of practice involves a set of practices known as the *History and Social Science Practice Standards*, my focus moving forward is on the specific discipline of history for a few important reasons. First, history is the most prominent discipline within the *2018 Massachusetts History and Social Science Framework* (Massachusetts Department of Elementary and Secondary Education, 2018), so a focus on history in particular may yield the most widely applicable insights across the span of the framework. Second, given that each discipline under the umbrella of social studies – or in this local context, "social science" – has distinct ways of thinking, it would be exceedingly difficult to attend to all these disciplines simultaneously in a clear and comprehensive way. Finally, the literature is more robust regarding the teaching and learning of history versus other disciplines such as civics, geography, and economics, allowing for a deeper review of literature.

## Policy and Contextual Factors in History Education

There are numerous policy and contextual factors that have shaped the landscape of history education – particularly at the elementary level – over the past few decades. Debates about the nature and purpose of history education (Keirn, 2018), standards revisions efforts (Hansen et al., 2018; National Council for the Social Studies (NCSS), 2013), and factors beyond the discipline such as an emphasis on test-based accountability structures (Heafner & Fitchett, 2012) have all impacted the way history is taught today.

### *Standards Revisions for History Education*

Throughout what Keirn (2018) calls "the long twentieth century" (p. 13), the history education field debated the purpose and nature of history education in U.S. classrooms. Toward the end of the 20th century, momentum built for a focus on historical thinking – a focus on the disciplinary and procedural knowledge of the field (Wineburg, 2001) – which has permeated recent standards revision efforts. In response to the Common Core State Standards movement, the National Council for the Social Studies (NCSS) published the *College, Career and Civic Life (C3) Framework for Social Studies State Standards* (NCSS, 2013), which lays out a vision for curriculum standards that prioritize historical inquiry within, and sometimes across, the disciplines of history, civics, economics, and geography. The goal of this document was to inform future state standards revision efforts to focus not only on the content knowledge of each discipline within social studies, but to also emphasize disciplinary thinking and inquiry-based learning (NCSS, 2013). Since the publication of the C3 framework, at least 23 states have revised their standards to adopt elements of the C3 framework in some shape or form (Hansen et al., 2018). These efforts have had implications for how history curriculum is developed within a state that has adopted these elements, given that district and school curriculum are likely

developed with these standards in mind. However, just because a set of practices have been signaled by policy documents such as state standards, this does not mean that these practices have been necessarily adopted by teachers or uniformly implemented within classrooms. As such, there is a need within the field to better understand how – if at all – these efforts to signal an emphasis on historical thinking and similar practices via state standards have played out.

### *Contextual Factors Affecting History in Elementary Grades*

In addition to the policy developments surrounding standards adoption, there are many other contextual factors that affect how – or even whether – history is taught at the elementary level. One of these challenges is the documented marginalization of the subject area in elementary schools. Heafner and Fichett (2012) analyzed data from the National Center for Educational Statistics (NCES) to identify a relationship between the policies of the No Child Left Behind (NCLB) Act of 2001 and a significant reduction in instructional time for social studies relative to other subjects, particularly those attached to testing mandates. Further, in a study of North Carolina elementary educators, Heafner et al. (2014) found that schools where social studies was integrated with English/Language Arts – likely a result of a focus on improving literacy to boost test scores – had less positive outcomes for social studies performance. Another challenge for history educators at the elementary level is the lack of content knowledge, relative to secondary teachers, which inhibits the utilization of pedagogical content knowledge (PCK) – the blending of content knowledge and general pedagogical knowledge in service of teaching a specific subject in the subject area (Shulman, 1987). In a study exploring the relationship between content knowledge and PCK, Covay Minor et al. (2016) found that a teacher's understanding of content knowledge was an important factor in their ability to engage in deeper thinking about the subject and how to teach it. This is important because elementary history

teachers are typically generalists and do not enter the classroom with a degree in history or other social studies disciplines (Thornton, 2001). These are important structural considerations to keep in mind when considering the feasibility of curricular and instructional interventions for inquiry in the lower grades.

## Historical Inquiry

A defining feature of recent efforts to revise how history is taught in classrooms across the grade span has been the emphasis placed on inquiry-based learning approaches. In this section, I provide a brief overview of inquiry in history education, extract a definition of historical inquiry from the many offered by the literature, and briefly explain the promise and challenges associated with historical inquiry.

### *Theoretical and Empirical Underpinnings of Inquiry*

Inquiry as a learning approach could be considered age-old, and inquiry-oriented instruction has its modern roots in the progressive education movement at the turn of the 20th century. John Dewey, perhaps the most prominent proponent of the approach, advocated for an educational experience that deals with the investigation of real-world problems in an authentic manner, while also advocating for an education that prepares students to be active and capable members of a democratic society (Dewey, 1916). Educational theorist Jerome Bruner (1966) has argued that "any subject can be taught effectively in some intellectually honest form to any child at any stage of development" (p.30), arguing for a constructivist approach to learning at all grade levels. More recent research in cognitive psychology has supported the use of inquiry as a mode of learning as well (National Academies of Sciences, Engineering, and Medicine et al., 2018). Given both the theoretical aspirations and empirical support for inquiry-based learning,

understanding how to foster its wide use in history classrooms becomes an important and worthwhile endeavor.

### *Inquiry in the History Classroom*

Not surprisingly, there are many different models and approaches to inquiry within the disciplines of social studies and specifically within the discipline of history. In his handbook chapter, Saye (2017) outlines a difference between what he refers to as disciplined inquiry (DI), versus disciplined civic inquiry (DCI). DI is primarily concerned with the disciplinary expertise of the academic discipline as the learning target, whereas DCI focuses on capacity for civic decision-making as the ultimate goal (Saye, 2017). An important distinction between the two – particularly within the discipline of history – is whether or to what extent ethical reasoning and explicit connections to current issues should play a role in the inquiry's aims. Despite this tension, both DI and DCI foster certain elements of inquiry: addressing a central question, using disciplinary literacies to investigate the question, and drawing evidence-based conclusions either within or beyond the disciplinary scope. In this sense, the essence of what Barton and Levstik (2004) term as *historical inquiry*: "asking questions, gathering and evaluating relevant sources, and reaching conclusions based on that evidence" (p. 188) may be the best fit for examining the knowledge base about inquiry in history classrooms. For the purposes of this review, I adopt Barton and Levstik's broader definition of historical inquiry, since these elements are present in Saye's definitions of DI and DCI, and so as not to exclude examples of DCI that could be otherwise instructive and beneficial in understanding inquiry within the discipline of history.

### *The Promise and Elusiveness of Historical Inquiry*

Whether in service of historical thinking or civic preparedness – or both – an inquiry-based approach to history education can afford students the opportunity to construct their own

knowledge and meaning making through active learning by eliciting deeper learning and higher order thinking about authentic content in the process (Barton & Avery, 2016). Further, research suggests that well-designed and well-executed historical inquiry positively affects students' historical knowledge and historical thinking (Brush & Saye, 2008; S. G. Grant, 2001). Given that central questions within historical inquiry invite students to challenge the status quo either within the discipline or of society more broadly, disciplined inquiry can also be a vehicle for more culturally relevant pedagogy (Ladson-Billings, 1995). As students can become more culturally competent through analysis of diverse sources and engaging in cognitively demanding work such as disciplined inquiry invites all students to meet high expectations. Despite the promise of inquiry-oriented history education, the model and its associated elements remain rather elusive in history classrooms (Fogo, 2014). The cognitive lift of historical inquiry in the classroom is great for both students and teachers alike (Saye, 2017) and socio-cultural and contextual factors, such as a lack of in-service support for inquiry, also play a significant role in inhibiting an inquiry orientation (Martell, 2020).

## Curricular and Pedagogical Factors Affecting Historical Inquiry

This section focuses in on two aspects of historical inquiry: curriculum and pedagogy, and I generally organize the following section along those two domains. Though they are certainly not mutually exclusive, I have sought to analyze studies for how they focus on either the *what* of historical inquiry or the *how* of the approach.

### *Curricular Factors*

The very definition and scope of what constitutes curriculum has been delineated and debated over many periods of time. As such, any attempt to analyze what the literature says about curricular factors affecting historical inquiry must first begin with a working definition of

curriculum itself. Using definitions provided by Glatthorn et al. (2018), I examine examples from the literature that address either *written curriculum* (learning goals and outcomes embodied in a school or teacher's curriculum) and/or *supported curriculum* (lessons and resources provided to a teacher to meet the written curriculum).

**The C3 Framework and the Inquiry Design Model.** In 2013, the National Council for the Social Studies (NCSS) published the *College, Career and Civic Life (C3) Framework for Social Studies State Standards* (NCSS, 2013), which lays out a vision for curriculum standards that prioritize historical inquiry within, and sometimes across, the disciplines of history, civics, economics, and geography. While not a curriculum itself, the C3 Framework was developed to inform the revision of state standards to which local curricula are tethered. In other words, a standards-based curriculum will ideally attend to the elements of the C3 Framework. Further, while the C3 Framework was originally developed to inform standards revisions, it has been in the field to directly inform curriculum design efforts (*C3 Teachers*, 2022; Swan et al., 2019). To assist teachers in operationalizing the C3's inquiry arc, Grant, Swan and Lee (2017) developed the Inquiry Design Model (IDM) as a curricular scaffold for educators. The IDM is a model for assisting teachers to develop curriculum that cohesively encapsulates the elements of disciplinary inquiry: the use of questions (delineated as 'compelling' and 'supporting' questions in both the C3 Framework and the IDM), disciplinary sources, and student-centered tasks where students engage these sources using disciplinary skills. The IDM is not a curriculum in and of itself, but rather a *blueprint* for developing inquiry-oriented curriculum and lessons (Grant et al., 2017, p. 24-26). The IDM, then, represents a tangible tool for assisting teachers as they plan for historical inquiry in their classrooms.

Given that the C3 Framework and IDM are relatively new to the historical inquiry landscape, empirical research about the effectiveness of these curricular tools is just emerging. A few recent studies, though, have shed light on how the Inquiry Design Model has played out in intermediate grades history classes. In a single-case study, Thacker et al. (2018) examined how a fifth grade teacher, Ms. Williams, used the IDM to plan and deliver social studies lessons. Using semi-structured interview data, observations of her inquiry-based lessons, and related artifacts, the researchers found that lessons designed with the IDM blueprint engaged students in historical inquiry, analyzing rich disciplinary sources in service of addressing broad compelling questions using evidence. While the IDM blueprint certainly brought coherence and a solid historical inquiry experience to Ms. Williams' classroom, the researchers noted that many of the features that made her inquiries so successful – such as scaffolds that go deeper than the IDM template elicits – were likely a product of her existing content knowledge and pedagogical knowledge.

In another study, Mueller (2018) looked at how teachers engage with compelling questions, which are a key feature of both the C3 Framework and the Inquiry Design Model. She interviewed six ninth grade civics teachers from the same high school in three stages, having the participants complete a Question Development Task before the third interview. Analyzing the data, she found that while teachers believed that compelling questions can be an impetus for historical inquiry – particularly if they are relevant to students and complex – teachers struggled with the ambiguities that come with developing a compelling question. When comparing these findings to those of Thacker et al.'s study, the C3 Framework and IDM blueprint hold potential for elevating the practice of historical inquiry in intermediate grades, but this potential is likely better realized if the teachers using the model have substantial content knowledge and pedagogical content knowledge to start.

**Reading Like a Historian.** If the research on the Inquiry Design Model shows the need for curriculum that does not require teachers to start from scratch, a study of particular interest is Reisman's (2012) study using materials from the Stanford History Education Group – a curriculum developed with historical inquiry at its core – in a high school setting. Reisman used the Reading Like a Historian (RLH) curriculum, which is a series of 83 document-based lesson plans spanning topics across a typical high school United States history survey course. The RLH design principles include a learning sequence that adheres to the following: (1) background knowledge; (2) central historical question; (3) historical documents; and (4) discussion. Reisman notes that one goal of this curriculum is to address the lack of classroom-ready materials that center historical inquiry. In the study, the curriculum was administered to 236 students at five high schools in a large urban district and classes in the tested group used the RLH curriculum for at least 50% of class time. Using a pre/posttest analysis, Reisman found that students in the tested group scored significantly higher than those in the control group on measures of historical thinking, historical knowledge, and general reading comprehension.

Reisman's (2012) study is an important one for understanding the promise of a curriculum designed around historical inquiry. Given the sample size, use of validated pre and posttests, and the use of multivariate analysis of covariance, the quantitative aspects of her study design provide a dimension of validation missing from much of the literature regarding inquiry in history, which often features smaller, less generalizable qualitative studies. It should be noted, however, that the RLH curriculum also prioritizes explicit strategy instruction – sourcing, corroboration, close reading, and contextualization – during the historical documents phase, and teachers were provided with multiple days of front-loaded professional development along with periodic follow-up PD, which suggests that the curriculum alone (i.e., models such as the Inquiry

Design Model) may not be the only factor in student outcomes. Still, Reisman's attention to curricular fidelity through observation helps lend trustworthiness to the findings by showing that although fidelity varied widely, the student outcomes were significant despite this variance, lending credence to the curriculum model itself. Lastly, though the study focuses on students in 11th grade, its findings suggest that a curriculum with similar design principles, but with sources and explicit strategy instruction modified for the readiness of students in the intermediate grades, could be of high utility for teachers who wish to promote historical inquiry through curriculum at the younger grades.

***Pedagogical Factors***

In evaluating studies related to historical inquiry curricular approaches, it becomes clear that what a teacher does *within* curriculum enactment is an equally important aspect of bringing historical inquiry to fruition. The following illustrative studies consider how teaching moves impact historical inquiry.

**Historical Thinking in A Fifth Grade Classroom.** In a practitioner-researcher study, VanSledright (2002) spent four months teaching a fifth grade United States History class, engaging students in historical inquiry about the colonial and revolutionary eras. In each unit, students examined historical sources to engage in whole-class discussions, with each unit culminating in some sort of performance task. VanSledright used a four-level historical thinking heuristic to guide his development of document-based lessons, and then continued to scaffold toward this heuristic, using formative assessments, guided reading supports, and discussion activities that fostered student movement toward 'level 4' analysis. VanSledright focused his analysis of student learning on a subset of eight students using pre/posttest data from the performance tasks, along with interview data, and found that students made gains on historical

inquiry practices such as reading critically across multiple texts, as well as in other areas of thinking historically.

This study is illuminating for two reasons. First, it shows the power and promise of what students can do at the intermediate grades when provided with a well-designed and well-scaffolded historical inquiry unit of learning. Given that this was an intervention in the sense that VanSledright (2002) joined the class from January to April of the school year, it is compelling to see the engagement and growth that students exhibited in just four units in the middle of the year. Further, the study demonstrates that a key aspect to student success in historical inquiry lies in the teacher's ability to effectively scaffold the learning *within* the lesson. Not only did VanSledright choose sources and tasks that were well suited for inquiry, he also developed scaffolds within and across the lessons that brought students to higher levels of analysis. Unfortunately, a limitation of this study is that VanSledright was a scholar who executed the lessons himself, and he acknowledges that the expertise in the literature he brought to the endeavor is likely difficult for elementary classroom teachers to emulate. Still, VanSledright's study demonstrates that historical inquiry and historical thinking may be elusive as a practice, but not because students at these grades are unable to engage in such learning.

**The Role of Scaffolding.** Saye and Brush (1999, 2004, 2006, 2007) have conducted numerous studies over the past two decades investigating the role that scaffolds play in the implementation of inquiry-based history modules. Originally interested in how multimedia can provide scaffolds to support historical inquiry, Saye and Brush eventually turned their focus to how the provision of such scaffolds can affect the instructional practices of educators executing historical inquiries, and eventually turning to understanding what influences teacher scaffolding of historical inquiry and what conditions and dispositions affect the use of scaffolds in the

inquiry-based history classroom. Through their work, Saye and Brush categorized scaffolds into two categories: hard scaffolds that are designed beforehand and anticipate student learning progressions, and soft scaffolds that are in-the-moment adjustments based on the current learning of the students at hand (Saye & Brush, 2002). While investigating the factors and dispositions that affect inquiry-based instruction, Saye and Brush (2006) examined the practices of two teachers who exhibited some degree of prior orientation to inquiry-based learning and a belief that students can engage in these types of learning experiences. While the two teachers made considerably different decisions when employing soft scaffolds – such as modeling versus probing, or modeling thinking aloud – they both more fully realized problem-based practices compared to a teacher the researchers' previous studies who did share similar dispositions about inquiry (Saye & Brush, 2002), supporting the hypothesis that epistemologies and dispositions about knowledge construction are an important factor in the success of inquiry-based history models.

**Scaffolding for Disciplinary Literacy.** While Saye and Brush's (1999, 2004, 2006, 2007) body of work highlights the importance of scaffolding generally, a recent study of a curriculum intervention at the middle school level sheds light on the use of scaffolding for disciplinary literacy in the intermediate grades. Focusing specifically on crafting written arguments as part of disciplinary literacy in history, Monte-Sano et al. (2014) developed an 18-day historical inquiry unit that focused on historical questions and culminated in an evidence-based writing task. After providing PD to teachers at one district, the researchers studied two teachers who participated in the PD and demonstrated strong fidelity to the curriculum. Monte-Sano and her team observed all 18 lessons for both teachers and conducted interviews to elicit teacher thinking about the lessons, as well as having both participants complete a questionnaire

and the same culminating task as the students as a posttest of disciplinary understanding and pedagogical content knowledge. An analysis of the data found that both teachers were effective in scaffolding the historical inquiry process, particularly with regards to source analysis. While part of this success lies in the hard scaffolds of the curriculum, the researchers note that the teachers were also able to engage in effective soft scaffolding throughout the lesson sequence, particularly when engaging students in cognitive apprenticeship (taking students through the thinking process of the discipline) through read alouds and building independence of student work over the course of the lesson sequence. Though both teachers were deemed by the researchers to have had strong content knowledge and effectively scaffolded within the lessons, they were not as successful at scaffolding the argumentative writing process. Still, this study represents the importance of using hard scaffolds in intermediate grade historical inquiry lessons to foster students' disciplinary literacy and offers a path for future studies of how teachers can effectively engage in soft scaffolding as well.

Returning to the Inquiry Design Model, the ability to develop effective hard scaffolds appears to be paramount for successful implementation. The IDM blueprint is intentionally broad, and the schematic focuses on vertical alignment (ensuring the sequence from compelling question to supporting tasks and sources to summative task are logical) and horizontal alignment (the effective sequencing of formative tasks and source logic) but does not offer much in the way of how to scaffold *within* a student task (Swan et al., 2019). While this affords teachers some creative and cognitive freedom and flexibility, it makes scaffolding for historical thinking within an inquiry a considerable lift. Addressing this issue, Muetterties et al. (2020) recently worked with two fifth grade teachers to design and implement a disciplined civic inquiry on the Suffrage Movement with particular emphasis on source logic and scaffolding student analysis of the

sources. They provided a robust offering of hard scaffolds throughout the inquiry by way of graphic organizer templates to help students process every source and to gather information across the various formative tasks. Even the discussion-based tasks had templates and organizers to help students hone in on the most pertinent information. The article suggests that a considerable amount of soft scaffolding took place, particularly in assisting students analyze the *Declaration of Sentiments* document, but no details are given about what the process looked like. While caution should be taken in not over-generalizing this example – there was no formal evaluation of student performance or teacher process – the article at least provides an insight into what scaffolds may be needed for intermediate grade teachers to provide effective instruction within the IDM blueprint.

**Educative Curriculum Materials: A Blended Approach**

Given what the literature has shown about the need for viable curriculum materials at the intermediate grades, coupled with the difficulties that intermediate grade teachers have in enacting the pedagogy of disciplined inquiry in history, one avenue that may be of interest to researchers and practitioners alike is the use of educative curriculum materials (ECMs). Attending to the role that curriculum could play in providing teachers with professional learning (Ball & Cohen, 1996), ECMs are designed to support teachers in developing their content knowledge and pedagogical content knowledge through embedded supports within the curriculum itself. In their foundational work on the topic, Davis and Krajcik (2005) offer a few guidelines for developing ECMs in all subjects: 1) ECMs should help teachers anticipate and interpret what learners might do, 2) ECMs should support teachers in developing content knowledge, 3) ECMs could help teachers relate across units, 4) ECMs could make visible the designer's pedagogical decisions, 5) ECMs should foster a teacher's pedagogical capacity (Davis

& Krajcik, 2005, p. 5). These embedded features leverage the curriculum in a way that addresses many of the identified challenges generalist teachers face in teaching with a historical inquiry approach.

One recent study sought to incorporate Davis and Krajcik's principles for educative curricular materials in a middle school history setting. Building on prior research about the Reading Like a Historian (RLH) curriculum, Reisman and Fogo (2016) studied the effects of expanding the RLH curriculum to include ECM elements in an effort to boost the quality of historical instruction exhibited by a middle school teacher. Drawing from a convenience sample of teachers who participated in an associated professional development program, the teacher, Mr. Johnson, was identified as having participated in all aspects of the professional development, devoting enough time to the curriculum in class, and showing enough of a baseline propensity for historical instruction on assessments designed by the authors. Mr. Johnson enacted three lessons from the RLH curriculum that had educative features. Observational data and semi-structured interviews were analyzed using codes related to the study's analytic framework that centered on the participatory relationship between a teacher and the curriculum, with particular focus on the types of questions asked. Reisman and Fogo found that Mr. Johnson's relatively weak content knowledge and pedagogical content knowledge were still an inhibiting factor despite the use of the educative curriculum materials. Further, the authors concluded that the curriculum itself did not seem to be effective in contributing to the quality of historical instruction.

At face value, Reisman and Fogo's (2016) study could be seen as a failure for the idea of educative curriculum as a strategy for augmenting the abilities of teachers to engage in historical inquiry. However, it should be noted that this study was a first and important foray into

understanding the *potential* of ECMs for disciplined inquiry in history. As such, the considerations for future work designing educative curriculum provided by the authors within their discussion are of help to those who wish to advance this avenue of historical inquiry. Specifically, Reisman and Fogo suggest that future ECMs should provide more conceptual understanding support to teachers, articulate the rationale behind pedagogical and scaffolding decisions, and consider ways to leverage media to provide exemplars to teachers within the materials themselves (Reisman & Fogo, 2016). These suggested elements tied to the findings of this study present opportunities to support teachers at the intermediate grades who, like Mr. Johnson, lack strong content and pedagogical content knowledge but possess a desire to engage students in historical inquiry and a willingness to engage with educative curriculum.

Outside the discipline of history, an article by Davis et al. (2017) examined the effectiveness of ECM use in elementary science classrooms over the course of multiple studies to refine the design principles that informed the aforementioned study by Reisman and Fogo (2016). Of particular note was Davis et al.'s finding that, similar to the issue with the RLH intervention, there was no statistically significant increase in teachers' content knowledge relative to those in the control group. Davis and her team did, however, find that teachers who utilized the ECM units showed significantly better understanding of science practices than those in the control group. Given that these studies focus on a different discipline (science) than history, caution is warranted in drawing similar conclusions about the promise of ECMs in producing a similar effect in history. That said, this line of research by Davis et al. may be informative for two reasons. First, the disciplinary practices of science featured in their work derive from the Next Generation Science Standards (NGSS), which contain inquiry-based practices for science that may have similar pedagogical attributes to disciplined inquiry in history

(NGSS Lead States, 2013, Appendix F). Second, the study involves teachers at intermediate grades who, similar to those in many of the studies in this literature review, deal with issues such as a generalist background and the under-emphasis of the subject matter relative to tested subjects. For these reasons, further investigation of ECMs – within history, as well as in other disciplines – presents a promising line of future inquiry at the intermediate grades.

**Professional Development and Professional Learning**

Another important aspect of teacher uptake of pedagogical frameworks is the role of professional development (PD). Recent scholarship in professional development broadly has sought to shift PD away from a focus on what teachers know and instead toward what they do (Ball & Forzani, 2009; Ball & Cohen, 1999; Darling-Hammond et al., 2017; Webster-Wright, 2009). Central to this theory of professional development is Ball and Cohen's (1999) framework for practice-oriented professional learning. Rather than engaging in traditional, didactic approaches to professional development, Ball and Cohen call for a model of professional learning that is situated in the everyday work of the teacher and the instructional practices that reformers wish to see in the classroom – versus the "workshop model" of one-off experiences (Ball & Cohen, 1999). Particularly, Ball and Cohen outline three aspects that should be present in professional education for professional learning: (1) professionals need experience with the tasks and ways of thinking that are fundamental to the practice; (2) professional learning should be centered in the critical activities of the profession; (3) professional learning should include substantial professional discourse and engagement in communities of practice (Ball & Cohen, 1999).

Further developing this vision for practice-based professional learning, Grossman et al. (2009) have advocated for approximations of practice – simulating certain aspects of practice

within a professional learning setting – to build the skill of teachers in implementing desired instructional practices. Grossman et al. (2009) note that such intentional use of approximation is necessary because unstructured field experiences and observations can often reinforce the status quo instead of fostering the desired practice. Grossman et al.'s (2009) approach to teacher uptake of instructional practices emphasizes *decompositions* of the practices, breaking each one down into discrete parts for teacher learning, and *rehearsals* of the practices in pre-service settings before enacting them in the classroom with students. More specific to history education, Reisman et al. (2018) have sought to articulate high-leverage practices such as discussion of historical sources for the purposes of decomposing the practice into essential parts for pre-service educators to learn and then approximate before implementing in history classrooms. While the notion of clear and agreed upon high-leverage practices in history education is far from resolved (van Hover, 2018), the work by Reisman et al. (2018) represents a step forward in bringing the practices-based model for teacher learning into the realm of history education.

Building on these principles of practice-based pre-service preparation, Darling-Hammond et al. (2017) identified seven characteristics of effective in-service professional development, including that it incorporates active learning, supports collaboration in job-embedded contexts, includes modeling, and is sustained in duration (p. 4). The findings from Darling-Hammond et al. (2017) also echo findings by Desimone (2009) in many ways, including a finding that effective professional development requires a considerable amount of duration both in hours and amount of meetings, though there is not a consensus about the amount of contact time needed (Darling-Hammond et al., 2017). Still, duration of PD is just one of many factors to consider. In a review of literature about various models of professional development, Kennedy (2016) found that duration of PD was not necessarily the critical component of

effectiveness across all of the studies she analyzed. In fact, Kennedy found that other factors deserve consideration, such as who presents the PD. She noted that effective PD that she analyzed was often facilitated by individuals or groups "who had long histories of working with teachers, were very familiar with teachers and with the problems they face and based their programs on their own personal experience and expertise" (Kennedy, 2016, p. 973). Kennedy's (2016) findings and those by Desimone (2009) and Darling-Hammond et al. (2017) show that PD is a complex venture and while there is some consensus on a set of features of effective PD, no one feature – such as duration – can be considered paramount over others. Instead, designers of PD should seek to create offerings that encompass a wide range of these features in tandem.

Many of the these consensus qualities of effective PD involve job-embedded actions such as ongoing reflection, coaching, and follow-up sessions. A study by Parise and Spillane (2010) sought to investigate the effect of on-the-job PD on teacher update of particular practices. In their analysis of self-reported survey data from 30 schools in a mid-sized urban district, they found that when controlling for school effects and teacher characteristics that collaborative discussion during job-embedded PD was the strongest predictor of change in teacher practices for both ELA and math. Taken altogether, these frameworks, along with studies such as the one by Parise and Spillane (2010) offer a vision for classroom-focused and practices-based professional development that could be of utility for those who wish to bolster the ability of elementary educators to utilize historical inquiry in the classroom despite the headwinds regarding a lack of content knowledge and pedagogical content knowledge outlined earlier in this chapter.

### *Professional Development in History Education*

When examining professional development within the discipline of history education, van Hover and Hicks (2018) note that the existent literature is unsystematic, not often related to

student-learning outcomes, and affected by the challenges associated with the contested viewpoints on the purpose and nature of history education. Despite these challenges, there have been worthwhile studies that provide insight into the potential for practice-based professional learning as an avenue for developing teacher self-efficacy for historical inquiry.

One study of particular interest regarding the format and nature of PD as called for by Ball and Cohen (1999) is a study by La Paz and her colleagues (La Paz et al., 2011) which examined the impacts of a Teaching American History grant-funded professional development program on student outcomes in disciplinary writing. The authors worked with a local school district to provide a four-day summer workshop to 53 teachers, providing participants with content knowledge as well as training on historical thinking strategies. La Paz and colleagues (2011) then randomly assigned teachers to either a networking group that would continue to engage in ongoing professional development and paid collaboration time, or a "PD only" group that relied solely on the summer workshop. Analyzing student data from teachers in both groups using hierarchal linear models, La Paz and her colleagues found that students of networking group teachers in fifth and eleventh grades had substantial growth in posttest document-based question scores as determined by effect size. La Paz and her team concluded that participation in 30 hours of professional development that included professional development networking activities yielded significant gains in student performance. This study is valuable in a few different ways. First, the use of quantitative methods to analyze student performance attends to van Hover and Hicks' (2018) identified gap in the literature regarding studies that examine student outcomes of professional development. Second, this study provides numerical values as guidance for time invested in professional learning for those who wish to consider student performance impacts in other professional development designs. Third, and perhaps most

valuable to this literature review, the study provides literature regarding the professional development of intermediate grade-level history teachers, with students of participating grade five teachers showing some of the strongest gains – including aspects of historical inquiry such as using evidence to address a central question.

Another line of research regarding professional development for inquiry-based history is the Persistent Issues in History (PIH) program (Saye et al., 2009). Although PIH focuses more on addressing enduring societal problems than interpreting history itself, the framework is similar to historical inquiry in that students address a central question using evidence from historical sources. PIH has been used to investigate various PD models for supporting teachers in developing the professional knowledge necessary to carry out such inquiry-based historical learning. For example, Callahan et al. (2016) provided seven intermediate school history teachers with a three-phase professional development program that focused on a series of lessons and materials from the PIH program. In phase one, teachers were oriented to the PIH framework through modeling and planning for instruction using the materials, with follow-up sessions in the fall and spring semesters as phases two and three respectively. Callahan et al. conducted pre-intervention interviews and analyzed transcripts from the PD sessions to conclude that the teachers did not reach the aspirational goals of the PIH model by the end of the school year. Though the researchers did not observe the desired outcomes, insights around better structures for the PD – such as stronger guidance and support for teachers while planning for inquiry-based instruction – inform future iterations of the PIH project.

The latest contribution to the PIH line of research is a three-year professional development study that explores how elements of the lesson study model can boost authentic pedagogy – in this case, inquiry-based learning – through iterative cycles (Kohlmeier et al.,

2020). Participating teachers were provided with a professional development experience that emphasized the lesson study model, which focuses on an iterative cycle of lesson creation, peer observation and debrief, and subsequent revisions to the lesson based on the peer feedback. There were 12 participants overall, seven of which taught grades four and five. Using a rubric from a national research project measuring authentic pedagogy, as well as coding and analysis of field notes, Kohlmeier and her colleagues (2020) found that one-third of the teachers made gains in independently planning for authentic pedagogy after the three-year program, and the teachers also began to articulate the values of the PHI model independently. The researchers concluded that while lesson study was a vehicle for teacher development toward authentic pedagogy, such a change in pedagogy – particularly for teachers who are barely or not-at-all versed in the pedagogy – is a time-intensive process and may be best suited for districts or schools that actively promote instruction that is consistent with authentic pedagogy.

**Conclusion**

Throughout this review of the literature, a few insights regarding the problem of practice for this capstone emerge. First, a number of studies indicate that a curriculum designed for the express purpose of engaging students in historical inquiry fosters such learning in practice. The clearest example of this is Reisman's (2012) Reading Like a Historian program, which has design principles that take historical inquiry into consideration throughout. Outside of the discipline, Davis et al.'s (2017) work in providing generalist teachers with a curriculum that is comprehensive and educative support the update of discipline-specific skills that foster inquiry as it should be conducted in science. The case of Ms. Williams designing her own inquiry using Inquiry Design Model was impressive (Thacker et al., 2017), but she had considerably more content knowledge and pedagogical content knowledge, which boosted her ability to work

independently. While it is important to not box teachers into a curriculum that is overly constraining, providing teachers with a more thorough curriculum is likely more helpful than expecting them to design their own. Broadly, such curriculum is in short supply at the elementary and middle grades, as many of these studies took place in secondary settings.

Further, the importance of effective scaffolding within a historical inquiry cannot be understated. In nearly every study presented, hard scaffolding (scaffolds that are built into the lesson ahead of time) of disciplinary literacies was present in some way. Studies such as those by Saye and Brush (2008), and Monte-Sano et al. (2014) demonstrate, however, that effective soft scaffolds (scaffolds that are on demand and specific to the students at the time) are more elusive in historical inquiry, and researchers need to continue to investigate how these skills are developed and replicated.

During the analysis of this literature, the role of professional development in the implementation of historical inquiry showed that curriculum alone is insufficient in fostering historical inquiry. Participants in the Reading Like a Historian curriculum studies (Reisman, 2012; Reisman & Fogo, 2016), as well as those who participated in Monte-Sano et al.'s study (2014) and Thacker et al.'s (2017) case study received considerable amounts of professional development prior to – and in some cases, during – the implementation of the curriculum and instructional interventions. The ongoing PIH research (Callahan et al., 2016; Kohlmeier et al., 2020; Saye et al., 2009) demonstrates the need for sustained, long-term professional development to effectively foster teacher efficacy for historical inquiry, particularly if teachers are to be designing their own inquiry lessons.

Overall, this review of the literature reveals that curriculum and instruction do not exist in a vacuum when it comes to historical inquiry in history. The literature suggests that a

comprehensive approach to supporting teachers with both inquiry-oriented curriculum and curriculum-based professional development – particularly in the intermediate grades – may be the best. Regardless of their prior knowledge or efficacy, providing educators with a wraparound approach of inquiry-oriented curriculum that is educative in nature and supported by practice-based professional development will possibly foster historical inquiry with fidelity and authenticity for teacher and student alike. Further investigation of such a comprehensive approach – practice-based professional development tethered to an educative historical inquiry unit – in a clinical setting could be of use both within the scope of this capstone and possibly beyond.

## Chapter 3: Methods

The review of the literature suggests that there is a considerable need to better understand how curriculum-based professional learning and the use of educative curriculum materials can support the update of historical inquiry practices by history educators, particularly at the elementary and intermediate grades. With regards to the problem of practice in this capstone, teachers in the Bradford Public Schools rarely experience curriculum-based professional learning for history education, and a lack of educative curriculum for history is an additional challenge. Given what the literature suggests about the potential of curriculum-based professional learning and educative curriculum materials for uptake of historical inquiry in elementary classrooms, a case study of such tools situated in the context of the Bradford Public Schools may be useful for addressing this problem of practice.

Using Ball and Cohen's (1996, 1999) theory regarding practice-based professional development, the purpose of this study was to examine how providing curriculum-based professional development and educative curriculum to fifth grade history educators in one particular school district in Massachusetts could support their uptake of historical inquiry practices as outlined in the Massachusetts *History and Social Science Practice Standards* and to gain insights into what elements of the professional development and educative curriculum, if any, support such practices in the classroom.

This descriptive case study sought to "illustrate or explain key features of a phenomenon" (Hancock & Algozzine, 2017, p. 39), in this case, the implementation of the professional development offering and educative curriculum unit. Thus, the study addressed the following research questions:

**RQ1:** In what ways, if any, does participation in curriculum-based professional development foster teacher uptake of historical inquiry, particularly:

c) Decomposition and modeling of practices during PD; and

d) Educative curriculum elements

**RQ2:** To what extent, if any, do the practices of historical inquiry transfer to the classroom?

**Study Design**

To investigate this problem of practice, I conducted a descriptive case study, as case studies are an effective way to study a contemporary phenomenon in its real-world context, particularly when a researcher seeks to understand the contextual conditions pertinent to the case (Yin, 2018). In this case, I sought to investigate the phenomenon of teacher uptake of historical inquiry within the policy context of *the History and Social Science Practice Standards* and within the situational context of the Bradford Public Schools. This research study was bounded by both time (a professional development workshop and a unit of study within a grade five course) and location (Bradford Public Schools).

The study focused on two activities: a curriculum-based professional development workshop for fifth-grade teachers that sought to support teachers in the uptake of a historical inquiry unit, and teacher use of the unit itself, which featured educative elements to assist the teacher during the execution of the unit in the classroom. By focusing on these two activities, this case study investigated whether, and to what extent, each of these elements supported teacher update of historical inquiry and explored the possible interlocking nature of the two elements together.

The structure of this case study draws from the concept of design-based research, which "documents the conception, development, assessment, and revision of educational innovations

so that others may learn from these design narratives" (Freedman & Kim, 2019, p.5). Though this particular study did not go through the multiple iterations typical of a design-based research project and was not meant to generate theory, having identified a problem of practice and seeking to address it through the design and pilot of curriculum-based professional development and educative curriculum materials attends to both the *analysis and exploration* phase (gathering local data and developing research goals) and the *design and construction* (developing and piloting the intervention itself) of design-based research (McKenney & Reeves, as cited in Freedman & Kim, 2019). This allowed for potential iterative work around both the professional development and curriculum by using findings from this study to further advance a design-based research approach to addressing the problem of practice over the long term. This design-based research approach to social studies curriculum, instruction, and professional development is an emerging field of methodology in history education, but one that shows promise with regards to understanding how teachers take up various aspects of historical inquiry (Callahan et al., 2016; Monte-Sano et al., 2014; Reisman & Fogo, 2016).

**Problem of Practice Study Context**

Bradford Public Schools is a mid-sized suburban school district in Massachusetts. The district educates approximately 7,200 students from grades Pre-K to 12. The district has eight elementary schools, two middle schools, two high schools, an alternative high school program, and a pre-school program. Demographically, the district is less diverse on average than the state (see Table 3.1), though this difference varies across the schools within the district.

**Table 3.1**

*Selected Demographics for Bradford Public Schools and Massachusetts*

| | White Student Population, % | English Learners, % | Low-Income, % | Students with Disabilities, % |
|---|---|---|---|---|
| Massachusetts | 55.1 | 11.0 | 43.8 | 18.9 |
| Bradford Public | 84.7 | 3.6 | 34.3 | 21.1 |

*Note*. Data are from the Massachusetts Department of Elementary and Secondary Education (DESE) website: https://profiles.doe.mass.edu/general/general.aspx.

Each of the eight elementary schools in the Bradford Public Schools are K-5 schools and serve as "satellite" or neighborhood schools, drawing their students primarily from the geographic area around the school itself. Principals for each school have autonomy over hiring and evaluating educators and are responsible for assigning teachers to each grade level. The curriculum for each subject is provided by the district's central office, with academic coordinators in charge of the curriculum and assessment policy for each academic subject area. I am currently the K-12 Social Studies Coordinator for the district. Subject Area Coordinators work directly with principals and classroom teachers to ensure consistency and fidelity of implementation for the curriculum, with English/Language Arts and Mathematics also utilizing instructional coaches who support this work at the elementary and middle school levels. For social studies, the level of engagement and collaboration between myself and K-5 teachers varies widely by school; some schools invite me to meet with teachers in grade-level meetings at least once a year, whereas other schools rarely create time for me to collaborate with teachers in a formal setting. Otherwise, teachers are provided with the opportunity to engage in voluntary in-service professional development sessions one to two times per year, with each session lasting two hours.

For social studies curriculum, Bradford Public Schools is fully aligned to the *2018 Massachusetts History and Social Science Framework* (Massachusetts Department of Elementary and Secondary Education, 2018). The district provides K-5 teachers with unit-by-unit curriculum maps that articulate the applicable state standards, a series of compelling and supporting questions based on the C3 Framework Inquiry Arc (NCSS, 2013) and aligned to the state content standards, a set of content knowledge learning outcomes, and a series of skill objectives that articulate the types of student-centered activities students should engage in during the unit. I created these curriculum maps with input from teachers across the grade span. The curriculum maps also provide a series of suggested resources aligned to each learning outcome. In each grade, there is a text resource that teachers may use with their students, but these text resources pre-date the revised state standards and in many cases, teachers have forgone the resources for teacher-created or teacher-curated resources instead. The district is in the process of adopting new curriculum materials at each grade level K-5 that fully align to the new standards framework. It is within this curricular context that this problem of practice is situated.

As the district K-12 Social Studies Coordinator, I have begun developing a series of historical inquiry modules using the Inquiry Design Model template (Grant et al., 2017) to serve as district-approved model resources at grade levels and aligned to standards where teachers have expressed a need for more resources and support. Though this work is in the early stages, anecdotal evidence suggests that teachers have been slow to embrace these historical inquiry modules.

**Sampling and Participants**

Utilizing a two-tier sampling method (Merriam & Tisdell, 2015), I conducted this study at two elementary schools where previous work with these schools showed that social studies is

sufficiently prioritized by both allotted time in the schedule and support for the subject from the building administrators. Engaging in this purposeful sampling (Merriam & Tisdell, 2015) allowed for best-case conditions when examining the research questions.

Continuing with two-tier sampling, I focused on teachers in grade five for two reasons. First, grade five features a scope and sequence that is exclusively history, which covers United States History c. 1750 through the Civil War and a conceptual connection to the modern Civil Rights Movement. Second, given that the structure of the content in this grade is organized into linear units of content (versus general domains in grades K-2), there is a higher likelihood that history is taught as a discrete subject at these grades (versus an integrated model), which provides for a richer data collection experience when conducting observations. After obtaining Institutional Review Board (IRB) for the Social and Behavioral Sciences (IRB-SBS) approval, I reached out to the grade five teachers in both schools via e-mail who are exclusively responsible for teaching social studies at that grade and are thus both at least generally familiar with the *HSS Practice Standards* and are teaching history as a discrete subject. Both teachers consented to participating in the study. From this outreach, I recruited two teachers for this study: Caitlin at North Elementary School, and Mary at Coastal Elementary School.[2]

***Caitlin***

Caitlin is in her second year teaching at North Elementary School (NES). NES is a neighborhood school of approximately 215 students. NES is more racially and ethnically diverse than Bradford Public Schools in aggregate, and its English Language Learner population is four times that of Bradford Public Schools overall, as well as twice the state average. Before coming to North Elementary School, Caitlin spent two years as an instructional aide at a private

[2] The names of both the participants and their schools are pseudonyms.

elementary school followed by two years of teaching fifth grade in an urban district elsewhere in Massachusetts. Caitlin has a bachelor's degree in elementary education and earned a master's degree in literacy and language. NES departmentalizes the subjects of science and social studies, so Caitlin is the only teacher of fifth grade U.S. History while her colleague exclusively teaches the science class.

### *Mary*

Mary is in her 15th year as a teacher at Coastal Elementary School (CES). CES is a neighborhood school of approximately 250 students and its racial and ethnic demographics are on par with Bradford Elementary School as a whole. Mary has taught various grades over the years but has spent at least the last two years teaching fifth grade. Prior to this recent stretch in fifth grade, Mary was a Consulting Teacher of Literacy (CTL) at a different elementary school in the district but chose to return to the classroom when the opportunity presented itself. She has a bachelor's degree in elementary education with a minor in history and a master's degree in education with a focus on reading. Like Northern Elementary, CES departmentalizes science and social studies, so Mary teaches U.S. History while her colleague teaches science.

## Data Tools

The data tools for this study were an interview protocol, field notes from an audio recording of the professional development session, and an observation protocol. The purpose of selecting these methods of data collection was to first understand how each participant currently engages or does not engage students in historical inquiry, then to evaluate how the participants participate in and process the elements of the professional development, and then finally to understand how, if at all, any of the elements of the professional development and/or educative curriculum manifest in the classroom.

### *Interview Protocols*

The interview protocols (Appendix B) supported two interviews during the research process: an initial interview at the outset of the study and a follow-up interview after the unit had been carried out in the classroom. Each begins with an explanation of the purpose of the study and a consent statement and then contains a series of questions with some follow up suggestions. In the first interview, I used a semi-structured protocol with questions that are largely informational in nature to gather relevant data about the background and context of the participant's teaching experience and to build some rapport and comfort at the outset. Anchored to the stated research questions of this study, the remaining questions explored the teacher's own understanding of the practice standards, their instructional planning process, how they may go about engaging students in historical inquiry, etc. The goal of this set of questions was to ensure that I could fully understand how each participant entered the experience as it related to their current history education practices.

The follow-up semi-structured interview focused primarily on how the teacher perceived the professional development and how educative curriculum impacted their enactment in the classroom. Questions delved into aspects of both activities and asked the teachers whether and to what extent each one supported classroom practices. The interview also asked the teachers to reflect broadly on how the process may have shaped their understanding of and relationship toward historical inquiry in their practice moving forward. The follow-up interview protocol afforded some flexibility to ask questions related to what was observed in each individual teacher's class to gain a deeper understanding of what took place and to triangulate classroom observation data.

In both interviews, the questions were descriptive questions (Hatch, 2002) and were open-ended to allow the participants to provide as much insight as possible into their practice and understanding of historical inquiry. Lastly, both interviews involved advising the participant that the researcher may reach out with follow-up questions and/or to clarify any information to capture the true intent of the participant's responses. All interviews were audio recorded and transcribed using Canvas Studio and Microsoft Word.

### *Field Notes*

During the professional development workshop, I engaged in participant-observation, which is when the researcher actually participates in the actions being studied (Yin, 2018), given my role as professional development facilitator. This positionality allowed for manipulation versus passive methods of data collection, such as when my interactions with participants shaped their understanding of the concept at hand during the PD. I recorded audio of the PD session and took field notes while listening to the recording. To help focus the field notes, I developed a set of "look fors" that anticipated where and what would be most valuable to focus my notetaking since being a participant-observer did not allow sufficient time to take notes about every aspect of the experience (Yin, 2018). These "look fors" were anchored in the aspects of curriculum-based professional development from the supporting literature, such as decompositions and approximations of practice.

### *Observation Protocols*

The observation protocols (Appendix C) were primarily used to triangulate interview and field note data relative to the two research questions and to also yield additional insights into the teachers' uptake of historical inquiry more broadly. As such, the protocol included a series of "look fors" to assist the researcher in spotting evidence that would support this goal:

- Does the lesson contain any visible or implied evidence of the use of practices decomposed and rehearsed in the professional development?
- Is the teacher demonstrating any use or consideration of the educative features of the curriculum unit?
- Does the lesson demonstrate the desired elements of historical inquiry (a central question, disciplinary literacies, and evidence-based arguments or explanations)?

Each of these "look fors" are anchored to the *History and Social Science Practice Standards* via the professional development and curriculum elements. The observation protocol contained a space for sketching the layout of the classroom. The protocol featured two columns for notetaking: one column for marking time throughout the observation and one column for taking running narrative notes of the lesson and any bracketed commentary from the researcher. Lastly, the observation protocol provided a space at the end for me to summarize takeaways from the observation.

**Procedures and Timeline**

After receiving IRB-SBS approval and participants were identified, the two teachers (a subset of a larger group participating in the professional development project) were invited via email to participate and a consent letter was provided to the participants outlining the purpose of the study, the commitment requested, and the benefits and risks (the study will help me provide better support for educators to teach history at the elementary level; no anticipated risks). Participants were informed that their participation is voluntary and if they were uncomfortable with any aspect of the study, they could cease participation at any time. Participant consent was collected before engaging in the data collection activities. A timeline of the data collection activities is presented in Table 3.2 below. After receiving the consent from the teachers, I

interviewed each teacher for approximately 30-45 minutes using the semi-structured initial interview template.

### *Educative Curriculum and Professional Development*

The study featured an inquiry-based curriculum unit (Appendix D) using the Inquiry Design Model (Grant et al., 2017) to support historical inquiry. The unit contains a compelling question, a series of supporting questions to scaffold student content knowledge building, and a series of tasks requiring students to engage with primary and secondary sources. The compelling question, "How did colonization change early America?" invites students to critically examine how the arrival of European settlers changed the land now known as New England. Supporting questions and associated tasks build student contact knowledge about initial relations between the Pilgrims and Wampanoag, the encroachment of European settlers on Native lands, the deteriorating relationship between the two peoples, and the proceedings and consequences of King Philip's War. Within each of these tasks, students are given the appropriate scaffolds to engage in historical thinking about the sources (Muetterties et al., 2020; Reisman, 2012). Students will conclude the unit by engage in a discussion exercise addressing the compelling question with evidence from the three formative tasks.

In addition to the student-facing components of the inquiry, teachers were provided with educative features within the curriculum materials to support the implementation of historical inquiry. These educative components served to assist teachers with important content knowledge understanding (referred to as "Big Ideas"), anticipating student responses, student-friendly definitions, and practices that foster historical inquiry (Davis et al., 2017). For each component, succinct notes to the teacher were embedded within teacher-facing narratives for each portion of

the inquiry to provide on-demand support to teachers while they enact the unit within their classrooms.

### *Professional Development Session*

I convened the teachers for a four hour professional development session in late August 2022 to orient the participants to the educative curriculum and engage participants in practice-based professional development activities such as decomposing and modeling historical thinking practices - particularly sourcing, contextualizing, and close reading - and rehearsing lesson elements for the participants. The practices and decompositions were adapted from the work of the University of Michigan's TeachingWorks project (TeachingWorks, 2022), as well as from similar findings by Reisman et al. (Reisman et al., 2018). All these activities were based in the educative curriculum the participants enacted in their classrooms during the fall semester. During this professional development, I compiled field notes about the experience, particularly relating to the decompositions and approximations of practice and the participants' engagement in these activities.

### *Teacher Enactment of Curriculum*

During the fall semester, teachers enacted the curriculum unit when they reached that part of the district's scope and sequence for grade five history. Caitlin began the unit first in mid-September, with Mary beginning the unit about a week and a half later in late September, meaning both teachers enacted the curriculum unit approximately one month after the professional development session. I observed these lessons and took notes using the observation protocol. It should be noted, however, that I needed to isolate for COVID-19 while Mary taught the unit in her classroom. I was able to attend the first two lessons in person and, with Mary's consent, Mary filmed herself teaching the remainder of the unit and I viewed these videos and

took field notes as I watched. After the completion of the unit and classroom observations, I engaged participants in a follow-up interview to debrief the classroom experience and the project as a whole using the follow-up interview protocol.

**Table 3.2**

*Timeline of Data Collection Activities*

| Time | Activity | Data Collected |
|---|---|---|
| July 2022 | Initial interviews | Interview transcripts |
| August 2022 | Professional development session | Field notes |
| September 2022 | Unit of study taught in classrooms | Observation notes |
| October 2022 | Follow-up interviews | Interview transcripts |

## Data Analysis

The first step of the data analysis process was to develop *a priori* codes (Bazeley, 2013) based on both the elements of historical inquiry and the theoretical framework of practice-based professional development which frames this study (Appendix E). The codes fell under three parent categories: *contextual*, *practices,* and *professional development/educative curriculum materials* (PD/ECM). The contextual category codes included data regarding barriers to inquiry and/or dispositions that may or may not support the use of historical inquiry in the classroom (Martell, 2020). Subcodes under the practices category involved data related to the aspects of historical inquiry such as central questions, gathering and evaluating evidence, and drawing conclusions about the question using evidence (Barton & Levstik, 2004). Subcodes under the PD/ECM category involved data regarding educative curriculum elements (Davis et al., 2017) and/or decompositions and approximations of practice (Grossman et al., 2009; Reisman et al., 2018). I used these initial codes to analyze the interview, field notes, and observation data while developing emergent codes as I went about the initial coding process. I

reviewed both sets of data once more to be sure that emergent codes produced in the late stages of the first round of coding were applied throughout each set. After each round of coding, I developed analytical memos describing my thought process and reasoning behind the development of emergent codes and coding choices.

After two rounds of coding, I began the process of data analysis by filtering the data for codes or groups of codes and reading the data again in this setting, both within-case and cross-case among the participants. I generated memos detailing any insights that emerge from each of these rounds of reorganization and review. This iterative process continued until my memos yielded themes for developing a set of findings.

**Researcher Positionality**

It is important to note that my role as both researcher and K-12 social studies coordinator for Bradford Public Schools creates biases that had to be considered during the data collection process. For example, it was likely that the participants may perceive my presence in the classroom for observations as a somewhat evaluative process given my role as a district administrator and that the formal evaluation process involves a similar observation experience. As such, I sought to be clear with participants that this process was in no way evaluative and that no specific information from this study will be shared with immediate supervisors. Further, I acknowledged my biases inherent in my professional role and worked to suspend my judgment about any data that surfaced regarding the curriculum or a teachers' pedagogy. I engaged in member checking of the data with each participant to ensure that I had captured the intentions of the participants in my field notes. Additionally, I prefaced interview questions by clearly acknowledging my connection to these factors and encouraged participants to feel comfortable being honest about their thoughts and feelings, as this honesty would help me better understand

their needs as social studies educators. Participation did not face any negative consequences nor will they in the future and their participation will not affect any future opportunities, relationships, etc., within the district.

**Trustworthiness**

To enhance the trustworthiness of the study, I triangulated data across interviews, field notes, and observations, with particular attention to comparing stated dispositions and practices during the initial interviews with participation the professional development and actual teaching during the observed lessons. As Yin (2018) notes developing convergent evidence through data triangulation helps to strengthen construct validity (Yin, 2018, p. 128). I also engaged in investigator triangulation, which entails involving other researchers to minimize biases (Flick, 2020). Specifically, I applied investigator triangulation to the data pertaining to my own role as a professional development facilitator. A colleague with general knowledge of approximations and decompositions coded samples of my own engagement independent of my own coding and we debriefed any areas of convergence. I constructed research memos after each round of data collection and generated memos between rounds of coding and data analysis to create a sufficient chain of evidence (Yin, 2018) by documenting the thought process between the stated activities of the study. I also engaged in member checks with participants after each round of interviews to ensure that I had accurately captured their thinking when transcribing and synthesizing interview data before continuing in the data analysis process.

**Assumptions, Limitations, and Delimitations**

An underlying assumption of this study was that a constructivist approach to teaching history is ideal. However, it is possible that the participants would not share in this assumption. For example, this study was predicated on the notion that a constructivist and inquiry-based

approach to history is preferred, but the participants may not have share in this belief. This not to say, however, that there is no room for direct instruction within a constructivist or inquiry-based approach, but that such instruction would be in service to an inquiry-based learning experience. Further, my prior work as a secondary educator made me more inclined to believe that a designated block approach to history is the best structure. Considering these assumptions and my biases, I was open to alternative findings and interpretations and ensured that my analysis of the data allowed for the possibility that the curriculum unit and associated historical inquiry practices may not be the only way to attend to the standards in the state framework.

### *Delimitations*

The study necessarily contained a set of delimitations to narrow the focus and create reasonable boundaries. This study was limited to fifth-grade teachers in the Bradford Public Schools who taught history as a distinct subject (i.e., not in an integrated model with English/Language Arts). Fifth grade was an intentional choice for this study since the Massachusetts standards – and subsequently, the Bradford Public Schools curriculum scope and sequence – call for a chronological study of United States history from c. 1600 to the Civil Rights Movement, which is conducive to historical inquiry given the potential to situate lessons and units with central historical questions. Additionally, the literature supports fifth-grade as a grade level conducive to historical inquiry and historical thinking (Levstik & Barton, 2015; Levstik & Thornton, 2018; vanSledright, 2002). An additional delimitation was the decision to only include teachers who volunteered to participate in the professional development and curriculum unit implementation project, versus recruiting participants who did not participate in these activities. By focusing on teachers who participated in the PD and curriculum project, I

could focus on an information-rich group of participants to gain insights into how these tools can best foster teacher uptake of historical inquiry.

### *Limitations*

As to be expected, there were limitations to this study. Given limitations regarding time and resource constraints, this study only examined one aspect of what could be a larger design-based research approach to the problem of practice. Only examining one professional development session and one inquiry unit made it difficult to determine whether any observed changes in teacher practices were sustained or enduring. However, a thorough analysis of one cycle of curriculum-based professional learning with a small group of teachers may also yield insights and findings that may go overlooked in a larger or more sustained study, and insightful findings from this study may garner support for a longer-term project.

Another limitation of the data collection process was that I was unable to conduct a baseline classroom observation to understand how teachers taught history before participating in the study. As such, I had to be intentional about leveraging the initial interview to gain insights into their prior teaching even if only as self-reported. Additionally, while the professional development and curriculum unit are informed by the literature, they have been developed specifically within the bounds of this problem of practice and site and have not been validated outside of this study. Because I watched parts of Mary's unit on video due to my required medical isolation, it is possible that I was unable to capture aspects of the experience in my field notes that I would have noted had I been present in the classroom. Finally, my role as both coordinator and researcher may have had an unintentional effect of response bias by participants who may have responded or reacted in ways that they perceived I would want them to respond.

This limitation required extra care and attention to member checking and being clear to the participants that their honesty and straightforwardness is valuable to this project.

# Chapter 4: Findings

I conducted a study that examined how two teachers engaged in two activities: a curriculum-based professional development workshop for two grade five teachers to support teachers in the uptake of a historical inquiry unit, and teacher use of the unit itself, which features educative elements to assist the teacher during the execution of the unit in the classroom. By focusing on these two activities, this case study allowed me to investigate whether and to what extent each of these activities support teacher uptake of historical inquiry and to also explore the possible interlocking nature of the two activities together. The study addressed the following research questions:

**RQ1:** In what ways, if any, does participation in curriculum-based professional development foster teacher uptake of historical inquiry, particularly:

e) Decomposition and modeling of practices during PD; and

f) Educative curriculum elements

**RQ2:** To what extent, if any, do the practices of historical inquiry transfer to the classroom?

After conducting initial interviews, facilitating professional development, observing the unit being taught, and conducting final interviews with each participant, I analyzed the data using the methods described in the previous chapter. In this chapter, I present findings from both within-case and cross-case analysis, and I also discuss how these findings connect to the literature. Lastly, I offer implications of the findings to the specific site of this study.

## Within-case Analysis

By engaging in within-case analysis before cross-case analysis I was able to first develop a deep understanding of each individual participant's experience. By doing so, when themes developed both within and across cases, those themes were more likely to apply beyond the

sample (Ayres et al., 2003). To analyze each case, I employed a time-series analysis, specifically focusing on the chronological sequence of the activities within the study as outlined in Chapter Three. Chronological sequencing can be more than just descriptive, as it can be rich and insightful about how participant perceptions and behaviors may change over time (Yin, 2018). I organized each participant's within-case analysis by starting with their backgrounds and dispositions and analyzing any perceived barriers to prior implementation of historical inquiry as gleaned from initial interviews, followed by a stepwise analysis of each of the activities of this study –PD participation and classroom enactment - and how they played out in the classroom.

### *Caitlin's Case*

As mentioned in the previous chapter, Caitlin was in her second year teaching at North Elementary School (NES). NES is more racially and ethnically diverse than Bradford Public Schools in aggregate, and its English Language Learner (EL) population is four times that of Bradford Public Schools overall, as well as twice the state average. Before coming to NES, Caitlin spent two years as an instructional aide at a private elementary school followed by two years of teaching fifth-grade in an urban district elsewhere in Massachusetts. NES departmentalizes the subjects of science and social studies, so Caitlin was the only teacher of fifth-grade U.S. History.

**Background and Dispositions.** Caitlin majored in elementary education at a small liberal arts college in the northeast. She majored in elementary education and, though she believed that she took a few history courses, she did not remember which courses, nor did she remember much of the content from them. She worked as an instructional aide in a private elementary school after graduating. Caitlin then worked on a master's degree in literacy while

working full-time. Upon completing her master's degree, Caitlin worked as a fourth grade teacher in an urban district for two years before coming to NES.

When asked about her personal beliefs and dispositions about history education and/or social studies more broadly, Caitlin articulated that learning history and social studies has a civic purpose:

> I think it's extremely important to know what happened in the past, because we've learned from a lot of things. But I just think as citizens of the United States that everyone should have an understanding of where our country comes from, like all of our values and how they came about. (Interview, 8/11/2022)

Interestingly, when pressed to further explain what values she believed were American values, Caitlin gave fairly broad examples:

> I think treating everybody with respect and kindness is an undervalued concept. But I feel like as a teacher that it's really my job to not just like teach my kids, but to help them be respectful and kind. I feel like the whole world would be a lot better if everybody was taught to be like that. (Interview, 8/11/2022)

When asked what she meant by understanding where our country comes from, Caitlin expressed that we should learn from the mistakes of history, and offered a few examples:

> I mean, like obviously we teach in fifth-grade about like slavery and all of the civil rights and everything, and like obviously today we know that that's so wrong. But I think it's really important that kids do learn all about that to know like how we got here today, and like that's how it used to be. You should know what happens, I feel like, as a prologue to what's going on. (Interview, 8/11/2022)

Though somewhat generalized, in this statement Caitlin offered that a key concept in history education is connecting past events to current affairs and suggested that teaching difficult history such as slavery was an important part of that work.

Broadly speaking, Caitlin also believed that an effective history education was "hands on" and when asked to elaborate on what that would look like, Caitlin struggled to articulate what that would mean but did offer that students doing the work - versus the teacher – was part of what a hands-on history classroom would look like. She would like to make her classroom "more interactive" and said, "I think if they [the students] could maybe like read a document and analyze it on their own, I think that would be more useful" (Interview, 8/11/2022). Caitlin had some experience with historical inquiry. She attended a three-session professional development pathway provided by the district during the 2021-2022 school year, though she admitted that she did not have enough time that school year to engage much in the inquiries that were presented.

**Barriers to Implementation of Historical Inquiry.** During the initial interview, Caitlin identified several barriers that prevented her from implementing some sort of historical inquiry in her classroom. First and foremost was the lack of high-quality materials and inquiry-oriented resources available to her. As she noted during the interview, the base district materials for Grade 5 social studies were inadequate for her students, and when asked what was lacking about materials, her response was, "Well, have you *seen* the textbooks in our classroom?" (Interview, 8/11/2022). Caitlin elaborated that the textbooks were not very well aligned to the standards and the complexity of the reading level – in her opinion – made the text inaccessible to most of her students. In the absence of effective materials, Caitlin described how she used websites such as Teachers Pay Teachers (TpT) to find materials that were better aligned and more accessible. Past studies of TpT and social studies lesson planning have shown the website to be problematic

when it comes to finding and consuming U.S. history resources that promote higher-order thinking, connections to student experiences, and multiple perspectives (Harris et al., 2021). As such, I asked Caitlin how she went about vetting resources on TpT and she told me that she searches by state standard via website filters and then makes a professional judgment call as to whether the resource is "whole" and encompasses all of the content of the standards. This aligns with what recent research has found regarding why teachers supplement with such materials, including meeting diverse student needs and filling instructional gaps (Northern & Polikoff, 2023).

In addition to a lack of high-quality materials, Caitlin identified a lack of professional development specific to social studies as a barrier to implementing inquiry. Though she was an instructional aide at a private elementary school and taught in a different school district in her own classroom before coming to Bradford Public Schools, the three-session in-service PD on inquiry that she attended in the 2021-2022 school year was the first PD that she could recall being offered for social studies in her career. Compounding this issue was also a self-identified lack of collaboration time for social studies planning with her colleagues. In our final interview, Caitlin mentioned that she only gets four prep periods a week and "unfortunately, social studies doesn't get priority" compared to tested subjects (Interview, 10/14/2022).

Despite these perceived barriers that Caitlin faced when considering inquiry-based approaches to social studies, there was also evidence to suggest that Caitlin could be successful in implementing historical inquiry with the right conditions. Being somewhat familiar with what historical inquiry should look like, Caitlin expressed a desire for students to do their own source work:

> I don't know just like I don't wanna have to do like, do everything like I just think that's an area where I think if they could maybe like read a document and analyze it on their own like, I think that would be more useful. (Interview, 8/11/2022)

She also expressed interest in using a gradual release model where the lessons start with a short teacher-directed period followed by student work, which would be conducive to students evaluating sources to address an inquiry question. One issue that did emerge was Caitlin's concern about the ability of some students to be able to engage in inquiry due to readiness or lack thereof. Caitlin expressed concern about learning loss, particularly when talking about the lack of accessibility of the district's current course text and her class from the previous school year:

> So we do like reading benchmarks every couple of months. And of course, social studies is a lot of reading. So my class was mostly reading on like a second grade level, like second, third grade. I had like two kids reading on grade level so picture that textbook in second grade like that's what I was dealing with. It was definitely a challenge across the board… (Interview, 8/11/2022)

She also mentioned that trying a model inquiry last year with that class went "slow" because she had "such a low class" and they struggled with reading sources. This was a recurring theme when reflecting on previous attempts at historical inquiry, with Caitlin explaining that even in her prior district, she found that the readiness levels of English learners and students on Individualized Education Plans (IEPs) were also naturally pre-disposed to struggle with source analysis. While some of these statements signaled a possible deficit mindset on behalf of the teacher, she did express a desire to find ways to use elements of the Universal Design for Learning (UDL) framework or other modifications to help students meet expectations. As such, this became an area of interest for triangulation and analysis as the study played out. Still,

Caitlin's generally warm reception to the idea of using disciplinary sources and engaging students in active learning in the history classroom suggested that she might be receptive to the professional development and curriculum enacted in this study.

**Professional Development Engagement and Utilization.** As mentioned in the previous chapter, the professional development for this inquiry unit involved a one-day session that was anchored by the unit being implemented in the classroom. The session was structured using the framework from the University of Michigan TeachingWorks (TeachingWorks, 2022) program and specifically focused on decomposing the parts of historical thinking practices as well as approximating each lesson through my modeling with teachers. To analyze how the professional development program influenced each participant's enactment of the unit, I compared my own facilitation of the professional development (e.g., coding and reviewing my own language during the decomposition and approximation work) to my observation notes and the same codes from the final interviews.

During the PD session, I used Task #1 from the inquiry specifically to decompose the historical thinking skills of sourcing, close reading, and contextualization. When implementing the same task in her classroom, Caitlin used language and teaching moves similar to those I modeled during the PD session. For example, in Task #3 where students are sourcing an account of a colonist who met with a Wampanoag chief named Metacomet to try and ease tensions, Caitlin said to students: "John Easton met with him [Metacomet], is that reliable?"…"Yes, but who is he [Easton]? Right, a settler, so it's reliable, but he's a little biased" (Observation Field Notes, 9/14/2022). Though Caitlin did most of the thinking herself in this excerpt, it is illustrative of her use of metacognitive moves such as modeling thinking aloud, bringing students

along for a cognitive apprenticeship through the steps of sourcing a document through her language.

In other sourcing examples from the classroom, Caitlin utilized a gradual release approach similar to what was modeled in the PD, with her doing one aloud with the class as a whole, then sending students off to work on the next documents in small groups and pairs. While students were working in pairs or small groups on the source work, Caitlin typically engaged in one of two activities. In some cases, Caitlin would attend to particular groups of students. For example, during one task, Caitlin convened an intentional grouping of students who are struggling readers and/or ELs and helped them through the text-dependent questions:

> "We're going to read the article…read the question at the top… so we just said they're friendly – this is a summary of King Philip's War, see the bolded words here? These are the topics that are going to come up [reads the text aloud] So when we say King Philip's War, what's another name for King Philip? Was he a colonist or a Native American, so do you think he went by his Native American name or English name? [Scaffolds students through answers to the text-dependent questions] (Observation Field Notes, 9/15/2022)

It is particularly important to note that the soft scaffolds that Caitlin provided in the moment through these questions were more about general reading comprehension versus the historical thinking skills. Beyond the few observed examples such as this one, Caitlin seemed to spend most of her time focusing on observing pacing and attending to general classroom management, announcing that she would be awarding "dojo points" which is part of a positive behavior intervention and support program she uses in her classroom. Still, consistent with Caitlin's dispositions about the importance of supporting struggling readers, she did make sure to work directly with particular students during the source work. Caitlin worked with students on tasks to

ensure that all students were able to access the text so that they could engage in the necessary historical thinking skills to develop evidence-based claims that answer the compelling and supporting questions. In our final interview, she was asked about these interactions, and she offered that she felt better equipped to support students with their reading comprehension because she had a better understanding of the content knowledge from our PD session, and she believed she was drawing from the modeled thinking aloud about the sources that I facilitated during the PD.

Another focus of the PD session was modeling and approximating eliciting student thinking when making evidence-based arguments. Here, Caitlin's observed practices were similar to those of the PD session but seemed to stay at a rather surface level. For example, during the PD session, I modeled how to facilitate a whole-class discussion about developing evidence-based claims to answer the supporting question in Task #1. During that modeling, I asked teachers to anticipate student responses – one of the educative features of the curriculum – and the consensus was that students would likely refer to the relationship between the Pilgrims and Wampanoag as friendly. I encouraged teachers to consider ways to probe that thinking a little deeper and to support students in providing a more complex claim. When it came time to enact this part of the task in Caitlin's class, the same answers teachers anticipated during the PD that students would give came up as responses during her lesson as well. Caitlin said to the students that she noticed a lot of students had put 'friendly' as an answer and asked why. Students offered that the Wampanoag approached the Pilgrims and that the Pilgrims invited them to the feast (this response is not historically accurate according to the provided sources). Upon receiving these responses, Caitlin said "ok" and moved on instead of asking students to support those examples with evidence from the text (Observation Notes, 9/12/2022). Comparing these

observation notes to the field notes from the PD session, this instance was a missed opportunity to support students in developing better evidence-based arguments. However, Caitlin did then ask broadly for general evidence to support claims, noting to students that "good researchers use evidence to support their claims" and students offered evidentiary examples from the text such as the Wampanoag bringing deer to the feast and generally mentioning that the text seemed like they were celebrating. Overall, this illustrative example seemed to show that Caitlin was trying to emulate the modeling provided during the PD – which worked with an anticipated student response that actually came up in class – but executed the strategy in a more general way. While fidelity to the dialogue and processes of the approximation within the PD was not the end goal of the endeavor, this observed instance provides data to ponder how – and to what extent – emulation of the approximating within the classroom can support student learning. In other words, the PD at least fostered the type of basic routines of historical inquiry desired, but not necessary anything deeper than what was modeled with the teachers.

During the final interview, I asked each participant to reflect on the perceived utility of each aspect of the PD and curriculum experience. Caitlin expressed that the PD was the most helpful part of this exercise:

> "I honestly thought it [the PD] was really useful. Teachers do love when they get some planning time though to, like, implement what you taught us. But I mean, we only have a certain amount. Of time. So I like really don't think I could have taught it like this though without all of that." (Interview, 10/14/2022)

When asked to elaborate on what aspects of the PD that she found most helpful, Caitlin replied, "Honestly, all of it. I don't think I if you just handed me that curriculum, I would have like tried, but I don't know" (Interview, 10/14/2022). Though this answer did not fully illuminate the

specifics of what was most helpful, it was a powerful statement about how the PD may have influenced whether a teacher would even engage in this type of historical inquiry. Caitlin believed that had she not experienced the decomposition of practices and modeling of lessons, she would have passed on teaching the unit altogether. Still, I asked her about specific aspects of the PD and Caitlin was particularly appreciative of the approximations, particularly modeling the lessons. She had expressed that she does not always like participating in PD that features modeling, so I asked what was different about it this time, Caitlin seemed to think that because these practices were novel to her way of teaching, she felt seeing them modeled was more helpful than in other experiences she has had. Caitlin offered specific aspects of the modeling that she felt were most helpful:

> "Yeah, like, just knowing that I should have a chart with the questions on it that we can add to, and that should be hung up. And how we discussed all that stuff, and the word wall stuff. And we even talked a little bit about, like notebooks or different strategies. So it just helps… I'm sure I would have figured out some of this stuff, but I probably wouldn't have done a really great job of it if I had to figure all that out on my own first." (Interview, 10/14/2022)

Interestingly, the on-the-spot examples of what Caitlin found most helpful during the modeling were not related to the historical thinking practices, nor were they even very clearly about historical inquiry per se – though the use of the anchor charts was intended to support students sustaining a multi-day inquiry with numerous supporting questions - but rather more general strategies to support the unit such as the use of a vocabular word wall and anchor charts for the compelling and supporting questions. Still, Caitlin believed that they were instrumental in her

being able to successfully implement the inquiry unit, and she expressed overall belief that the PD was the most valuable aspect.

**Curriculum Materials Use.** As outlined in the previous chapter, the study sought to understand how the combined use of practice-based PD with educative curriculum materials could help foster historical inquiry. The four main educative features of the curriculum were a) identifying big ideas; b) anticipating student responses; c) student-friendly responses; and d) connections to practices. To analyze Caitlin's use of these features, I compared the direction offered to teachers within each of these features to field notes of Caitlin's lessons.

Generally speaking, Caitlin did seem to bring elements of the educative features into her practice when enacting the curriculum unit. For example, the student-friendly definitions element highlighted specific academic vocabulary and terms that were important for students to know in order to be successful on the tasks. Caitlin created a word wall with these terms and added each term as they came up along the unit (which corresponded with when they were presented within the teacher's guide). The definitions that Caitlin used on the word wall were nearly identical to those within the educative elements. Further, Caitlin's language during the tasks were indicative of the big ideas as outlined within that element. For example, she made sure that students understood in Task #2 that the Native populations were being threatened by colonial expansion, and in Task #3 she used language with students that emphasized the concept of change over time from 1621 to 1675.

In one instance, however, Caitlin missed an opportunity to reinforce a big idea about the initial relationship between the Pilgrims and Wampanoag in 1621. The big idea element for that task directs teachers to make sure that students understand the mutual assistance aspect of the relationship, particularly through a defense treaty signed by both parties. However, during the

whole-class discussion at the end of the task, it appeared that few students referred to this document in supporting their claims about the relationship between the Pilgrims and Wampanoag, and Caitlin did not use this guided discussion to bring that evidence to surface. During the final interview, I brought this noticing to her attention and asked if she had any insights about it. She responded:

> "That's true. I wonder if it's just because they already have so much background knowledge about that [the first Thanksgiving]. And I don't know, the treaty was probably the more confusing source that we use just because of some of the language, I think." (Interview, 10/14/2022)

Caitlin made some interesting points about the influence of background knowledge and also wondered if text complexity discouraged students from using the source to make the claim, which are both insightful wonderings. However, given that the big idea element for this portion of the curriculum sought to help teachers keep the mutual assistance aspect of the relationship at the forefront of student thinking, her two comments suggest that she may not have relied much on this element within this particular task.

More broadly, I asked Caitlin about the educative features in the curriculum during our final interview. Caitlin was forthcoming that – compared to the PD experience – these features were not as helpful to her in the moment during her unit enactment:

> "I mean, when you're teaching, you don't have a ton of time to read. But yeah, I would like review it, but I did honestly remember a lot of what we talked about with you [during the PD] and like the format of each task is the same. So, after the first one, it's kind of easy, but then I would like look back at my notes for like how we filled out the documents and using that for their charts." (Interview, 10/14/2022)

Given that Caitlin found the entire document to be a lot to read when you're teaching it, the educative portions of the teacher's guide that were not within the four element boxes – such as suggested teacher dialogue for direct instruction components – were likely also not too prominent for Caitlin during enactment. Caitlin did note, however, that the color coding of the four educative elements within the document was helpful, which suggests that prioritizing the aspects of the curriculum that are most important for teachers could be better served by this design element. With this in mind, it was clear from Caitlin's comments about relying on notes and artifacts from the PD session that this superseded the educative curriculum guide when it came to enacting the unit within her classroom.

One aspect of the curriculum that seemed to also foster historical inquiry in Caitlin's classroom were the student-facing materials. As noted in the previous chapter, the student materials for this unit drew upon elements of other inquiry-based curriculum programs such as *Read.Inquire.Write* (Monte-Sano et al., 2014) and *Thinking Like A Historian* (Reisman & Fogo, 2016). Documents within a task, for example, had text-dependent questions that scaffolded students to engage in the various elements of historical thinking such as close reading, contextualization, and sourcing. During observations, it was clear that these hard scaffolds for the documents, along with other hard scaffolds within graphic organizers to help students transfer knowledge across the inquiry, were an important part of the historical inquiry process. Caitlin would often refer to these questions and scaffolds when working with students individually and facilitating whole-class discussions. In one instance, a term that was glossed in a document was given extra attention by Caitlin as she guided the class through a close reading of the document, suggesting the fact that the term was glossed was in itself an educative signal and that defining the term and ensuring student understanding should be emphasized. As such, it is

possible that while the hard scaffolds within the student-facing materials were created as a student-forward element, these hard scaffolds also educated her about which aspects of the historical inquiry process should receive attention, or how to go about bringing student thinking along during that process.

**Historical Inquiry in Caitlin's Classroom.** When considering Catlin's experience as a participant, I sought to understand how her personal experience could provide insights that would be valuable in the cross-case analysis process. Within the context of Caitlin's case, it is important to consider whether historical inquiry as defined by Barton and Levstik (2004) - asking questions, gathering and evaluating relevant sources, and reaching conclusions based on that evidence – occurred within her classroom.

Broadly speaking, there was observable uptake of historical inquiry within Caitlin's classroom. This is encouraging given that there were initial indications that some barriers such as her prior dispositions about student capability, were a considerable threat to the endeavor. Despite expressed dispositions about her students that were deficit-oriented, Caitlin was able to provide her students with a thorough and complete historical inquiry experience. Though my questions about dispositions in the initial interview were intended to help get a sense of whether or not she had engaged students in historical inquiry before this study, I found Caitlin's dispositions about her students were a compelling theme within her case. During the initial interview, Caitlin frequently mentioned how she felt the lack of readiness for some students was a particular challenge that inhibited inquiry-based learning. Specifically, Caitlin referred to her previous year's class as "low" when it came to reading abilities and cited the "lower capabilities" of her students at her previous school as well. At face value, I was inclined to conclude that

Caitlin had dispositions about her students that were entirely deficit oriented, and I wondered how that would affect her enactment of the curriculum unit.

During the observations, however, it seemed as though most or all of the students in this similarly mixed-ability classroom were able to effectively engage in historical inquiry. Part of this seemed to be a result of the various hard scaffolds provided to students within the unit materials that helped break the complex process of historical inquiry into more manageable parts. Part of this observed engagement, however, was also due to Caitlin's moves and use of soft scaffolds – such as working individually with struggling readers and providing them with more piecemeal comprehension questions to help them arrive at the desired understanding – which showed that, although Caitlin may have held assumptions that students who struggle with reading cannot access historical inquiry, these students seemed to be able to do so.

When I asked Caitlin about this during the final interview, she acknowledged that these students did seem to be able to access the curriculum and engage in historical inquiry, but she still insisted that this was mostly due to the fact that this year's class was stronger than the previous class. While this study did not involve data collection methods or designs that would allow for a deeper dive into her claim (e.g., comparing student participation across each class, etc.), nor can it be definitively concluded that the curriculum and/or professional development made it possible for students who struggle with reading to access inquiry, it was nonetheless clear that a theme within Caitlin's case was this interplay between her held beliefs about the capabilities of some students and the ability to bring about historical inquiry in her classroom. She was skeptical about whether it would work with all students, but the observational data suggests that it did, and her own instructional decisions – despite these held beliefs – made it possible.

Though the elements of historical inquiry were present within Caitlin's classroom, analysis of the observation data showed some consistent signals that the level of thinking about aspects of the inquiry was not always deep. Throughout the unit, there were instances where a few students would seem to grasp the big idea of that task and Caitlin would mark this for both the responding student, but there was little or no building upon these ideas across the class or even sometimes from Caitlin herself. Instead, the 'correct' answer would be validated and everyone would move on to the next part of the task. Similarly, I talked with Caitlin during the final interview about how the summative task went, and though she did get sufficient claims from most of the class, she expressed disappointment that the evidence and reasoning to support those claims were lacking. When I asked her what she thought about this finding, Caitlin believed that she would be more intentional next time about ensuring that students were sufficiently tracking the necessary evidence along the entire inquiry. Indeed, sustained inquiry is a challenge at any grade level, but Caitlin's observations, along with my own, show that there was room for improvement as far as the depth of thinking and engagement in making evidence-based claims in response to inquiry questions.

Finally, Caitlin's case may serve as a helpful one for considering how novice teachers and/or teachers with limited content knowledge may deal with the implementation of a historical inquiry unit within their classroom. While Caitlin found the PD to be helpful and highly illustrative, she mostly relied to on the moves at face value during observed lessons. This may indicate that Caitlin was more focused on the procedural aspects of the inquiry as that was what she was most ready to address. Further, Caitlin's lack of content knowledge about the topic - – she had a limited content background from college and has not taught history for more than two years - may have also played a factor in this experience, as she did not probe student thinking

deeply on the big ideas that were featured in the curriculum guide. Still, one interesting area of possibility was in the actual interview process for this study. During Caitlin's final interview, I presented specific examples of teaching moves or student moves where I was curious what she thought about it or why she supposed it happened like that. For example, I asked Caitlin about a time when she chose to move on from a student answer instead of probing the response further. In most of these examples, Caitlin had not thought about those instances until presented with them and went on to engage in considerable reflection about them in the moment. Some of these reflection statements included ideas about how she would approach them differently the next time she taught the lesson. As such, it is possible that Caitlin's case may be an interesting illustration of how an ongoing PD model such as instructional coaching cycles or lesson study may also support a teacher like her in the update of historical inquiry.

### *Mary's Case*

Mary was in her 15th year as a teacher at Coastal Elementary School (CES). CES is a neighborhood school of approximately 250 students and its racial and ethnic demographics are on par with Bradford Public Schools as a whole. Mary has taught various grades over the years but has spent at least the last two years in the classroom teaching fifth-grade. Before this recent stretch in fifth-grade, Mary was a Consulting Teacher of Literacy (CTL) at a different elementary school in the district but chose to return to the classroom when the opportunity presented itself. Like NES, Coastal Elementary School departmentalizes science and social studies, so Mary teaches U.S. History while her colleague teaches science.

**Background and Dispositions.** Mary had a bachelor's degree in elementary education with a minor in history and a master's degree in education with a focus on reading. Mary remembered fondly her history minor courses, particularly courses on women's history and the

Holocaust, and she believed this was where her love for the subject of history took hold. When describing her passion for history, Mary described experiences and resources:

> "I just love history. You know just, whenever we're in a place where I can go visit a museum - we were in Philly last year and I got to see the American Revolution Museum. Going to Washington and walking through the Holocaust Museum, it's just. It's just amazing. … Even when I read for pleasure, I'm reading historical fiction books, so. Yeah, I'm picking up the history from that too." (Interview, 8/8/2022)

Here, Mary offered in-person learning experiences about history through museums. Further, she emphasized historical fiction as her preferred genre and noted that this was a source of learning content knowledge even though it is not non-fiction. Still, it was clear that, at least from Mary's perspective, she valued the subject, and her interest and passion was what drove her to want to teach history in her own classroom.

Perhaps drawing from her love of historical fiction, or from the nature of exhibits within a museum, Mary felt that a good history education experience is similarly about examining narratives. In particular, Mary valued the use of history to tell a story:

> "The very first day we're I'm teaching social studies every year it's let's look at the word history. It's got the word story in it. …Where do we come from, like, who are we? You know, the troubles that we've encountered through the years, and how did we persevere through that and really how history kind of repeats itself and what connections we see from present time to the past and are we handling that differently? What did we learn from the past that can help us in these situations now?" (Interview, 8/8/2022)

When I asked Mary whose stories should be told, she made reference to Native Americans, and then pivoted to the Pilgrims, which she noted was "one of her passions" as it was part of the local

history context. She said that it was important for students to understand the impact that the arrival of Europeans had on Native Americans, possibly articulating this example because it was a topic in the upcoming inquiry.

Still, despite a belief in history as a story that may be seen as favoring a didactic transfer of narrative from teacher to student, Mary expressed a belief that history should be student-centered. When asked what her ideal history lesson would look like, Mary offered the following scene:

> "Like, give the kids a picture on the Smart Board, give them a document, whatever it is. And really have them do kind of a notice and wonder with it. Like when you're noticing what does it make you think? And then give them, you know, some of the background content because that needs to be delivered and then just giving them time to go off and explore, whether that's with their partner reading a document or article, whatever that may be, and then having them engrossed in some type of a hands on project. You know, the kids are just going to pick it up more if they can engage in it. I love to have them make either digital posters or posters to go along with something." (Interview, 8/8/2022)

When paired with Mary's statements about the importance of narratives and stories in history, this excerpt suggests that in an ideal classroom, Mary's students would collaboratively engage in source work to discover - or perhaps even construct - narratives about the past, which would align well with the historical inquiry unit at hand.

Mary's background as a literacy teacher was also an influencing factor in how she approached history. Mary had a master's degree in education with a focus on literacy, and she taught English Language Arts (ELA) in each year of her career as a classroom teacher. Additionally, Mary spent the two years prior to this study trying a different role as Consulting

Teacher of Literacy (CTL) at a different school in the district. CTLs work within the classroom to support teachers during reading, writing, and literacy instruction, as well as working with students individually or in small groups on reading intervention. However, after two years in this role, Mary felt the pull back to her own classroom and she returned to CES to teach fifth-grade once again. According to Mary, when asked by her principal what would be her dream combination of subjects to teach, she responded with reading, writing, and social studies.

Mary's work as a CTL and her background in ELA and literacy also played a role in her dispositions about how history should be taught. In her previous role as a CTL, Mary indicated that she would often try and convince classroom teachers that ELA skills were transferable to the social studies classroom:

> "That's something that in my role as CTL we were trying to say to teachers. You're teaching nonfiction in literacy, but those strategies carry over to the content areas because the teachers don't think about making those connections with the kids - like, OK, we just did a whole lesson on how tackle difficult text. Let's do that with a science or social studies piece or, you know, we annotate in ELA, let's do that in the content areas as well." (Interview, 8/8/2022)

Though these ELA strategies were focused on general reading comprehension, they would likely also be beneficial to students who were attempting to engage in disciplinary literacies as well. Mary saw this as a natural fit, and one that she tried to bring into her own teaching.

**Barriers to Implementation**. If Mary's description of a perfect history lesson sounded conducive to historical inquiry, it was likely informed in part by her prior participation in professional development about the model. Mary participated in a grant-funded PD project provided by the district in 2021 where the teachers in various grades worked with teachers in

those same grades at a nearby district to engage in professional learning about the Inquiry Design Model (IDM) to work together to create pilot inquiries on various topics in U.S. history. Mary was a CTL at the time but worked with the fifth-grade team that developed an inquiry on the Jim Crow era. As such, Mary was at least somewhat familiar with historical inquiry through the IDM process. However, when I asked Mary about that prior PD experience, Mary admitted that, because of her role as a CTL, she did not actually enact the inquiry. Further, though she felt the IDM was a high-quality resource, Mary went on to explain that she has reservations about the Inquiry Design Model, particularly about whether IDMs are too robust to work within the time constraints of a fifth-grade classroom. As such, Mary saw a lack of instructional time allocated to social studies as a barrier to implementing historical inquiry.

Mary also found that a lack of resources presented a barrier to implementing historical inquiry in her classroom. Mary explained that when she began her unit and lesson planning for social studies, she first consulted the district curriculum maps, which have supporting and compelling questions within them, as well as suggested sources that were conducive to historical inquiry. However, Mary found the resources available to still be limited, and CES did not use the district adopted text, instead using an old version of a different text, *History Alive!* which Mary said was outdated for the revised curriculum maps and was inaccessible to a lot of readers in her class. Instead, Mary often went online in search of better resources:

> "So I think finding articles and documents that are written at a fourth, fifth-grade level that the kids can really understand and that's not overwhelming for them to read. They can read it, they can annotate it, they can mark it up and they can understand what it is they're reading. You know, I think some of the social studies articles are getting better that you can find on the internet. So sometimes I will spend some time just random

> Google searching, you know, 5th grade articles on 13 colonies or whatever it might be. It's a time suck." (Interview, 8/8/2022)

Mary believed that finding resources that were accessible and that – in her opinion - met the expectations of the district curriculum was a laborious endeavor, and one that took away a lot of precious planning time. Perhaps more important, though, was that part of this challenge may have been due to Mary's high standards for materials. Mary wished to find resources that were not only conducive to her students' reading abilities, but that were also of high historical quality – an important consideration for effective historical inquiry. In fact, Mary got discouraged when she found resources that she believed were sub-par:

> "You know, I think like places like Teachers Pay Teachers probably has all of that, but I can't stand that website; I stay away from it. I think they dumb it down too much and it's just a lot of worksheets and busy work. I don't find a lot of what's on there engaging, so when teachers use it for ELA - which they do all the time - it's just something somebody created to make life easier." (Interview, 8/8/2022)

Given the quality control issues of websites such as Teachers Pay Teachers (Harris et al., 2021), Mary's strong statements about the website were interesting in that she seemed to recognize what made TpT problematic, suggesting that Mary was capable of vetting resources for quality when it came to historical inquiry, but she just could not find enough resources that met those standards.

One final barrier to implementing historical inquiry that Mary spoke of is the inability to collaborate with peers on history and social studies. Mary spoke frequently about how much she values peer collaboration with regards to lesson planning, speaking about her recent work as a CTL and the embedded collaboration structures of that role. Mary used collaboration time

afforded by the school to work with teachers on various elements of ELA units and to compare student work. In contrast, Mary admitted that most or all her social studies planning was traditionally on her own due to both the lack to time afforded by the school and the nature of how the subjects were assigned for the upper grades at CES, with one teacher taking social studies exclusively while the other teacher took responsibility for science. This was not for a lack of desire, however, as Mary expressed that one of the driving forces behind her participation in prior professional development for history and social studies was the opportunity to collaborate with peers, even if short-lived and not with colleagues within her school. As such, Mary believed that if she had more time to collaborate on history, she would be more likely to engage in historical inquiry practices.

**Professional Development Engagement and Utilization.** As was the case when analyzing Caitlin's case, to analyze how the professional development program influenced Mary's enactment of the unit, I compared my own facilitation of the professional development (e.g., coding and reviewing my own language during the decomposition and approximation work) to my observation notes and the same codes from the final interviews. Given the focus in the PD session on decomposing historical thinking within Task #1, I looked at data from that task most intensely, followed by the print source analysis in Task #3 regarding the deteriorating relationship between the English colonizers and the Native Peoples.

To start the inquiry, Mary made explicit mention and explanation of both the compelling and supporting questions to students:

> We have two questions and I want to talk about my first question – we are going to talk about this question first which we're going to think about for the next few days [reads the compelling question]. Any words that might be unfamiliar? What do you think that word

might mean? Right, colonies, don't we see that word hidden in it? So, colonization is when we have like one group of people talking over another group – does that fit with what we were just talking about? [Mary writes the full definition on the word wall] … OK, so, here's our supporting question for today, "what was the relationship between the Pilgrims and Wampanoag like in 1621?" I want you to keep that in the back of your head as we go along." (Observation, 9/22/2022)

In addition to foregrounding the compelling and supporting questions for students as modeled in the PD, Mary also made use of the word wall and provided a student-friendly definition of *colonization* in the moment as also modeled. Mary seemed to have drawn from her ELA and literacy background when doing so, as the breaking down of the term into the root word of colonies was not part of the featured modeling, suggesting that this slight modification was something that was part of Mary's general practice.

When introducing historical thinking to the students, Mary used much of the same wording as was modeled during the professional development session. Mary conducted a thorough and intentional description of what sourcing is and why it matters:

"We want to study this source a little bit, so we're going to do something called sourcing, so we're going to think about where is it from, is it accurate, etc. So we're going to take a look at this and think where is this from and where did it even come from? [Student: First Thanksgiving] Ah! I see so we know where it's from, what else do we know? [Students: 1914] I'm so glad you noticed that! So, was that close to when the first thanksgiving happened? NO! It was a long time after, so the person who created this were they there? No, so do you think this is a primary source, which comes from the time period? No, this is a *secondary source* [writes a definition on the easel] So if they created it way after and

> they weren't there, do they know all the details- do they know what happened? And I'm looking at the artist and I'm going to write I don't know who that is." (Observation, 9/22/2022)

In this excerpt, Mary's use of very specific scaffolding and language that signals thinking aloud was very similar to that employed during the modeling PD of this part of the task. Further, Mary's integration of the word wall into the mini-lesson itself – defining *secondary source* and adding the definition to the word wall in the moment – was also a modeled teaching move from the PD.

After Mary broke down the skill of sourcing and modeled it for students in the first source, she had students work in "quads" together while she checked in with each group. Mary made sure to check that students were able to effectively read the text, having students show her what they were working on or what they were reading. What really stood out during her interactions with students was how much Mary probed student thinking across her interactions. In one conversation about sourcing, Mary asked a student, "Ok, tell me why you think it's reliable?" In multiple interactions, Mary pushed students to fully explain their thinking, consistently instructing students to "tell me more" about whatever they were saying. Students often responded with more detail and Mary would either validate the part of the explanation that came from the source or ask them to find a passage within the source that supported their claim. Mary also engaged in soft scaffolding of the historical thinking process with some students. For example, when one group of students had sufficiently analyzed the first source, Mary said to the group, "OK, now I want you think about how does this source compare to the picture?" By tasking students with doing this comparison, she was using her questioning line to direct students to start corroborating sources, pushing their ability to engage in historical thinking practices.

The ultimate aim the modeling of the practice within the PD session was not strict fidelity of implementation or word-for-word adherence for its own sake. Rather, the theory of action was that if the modeling was clear and transferable to teachers, then the use of similar moves would hopefully foster historical inquiry within the classroom. Observational data from Mary's lessons suggested that students were in fact taking well to her use of the modeled practices. In one instance, Mary was conducting a whole group debrief within Task #1 with students assessing whether the 1913 portrait of Thanksgiving was historically accurate. When the class concluded that the portrait was inaccurate, one student became very impassioned and asked a novel inquiry question on the spot, realizing that the work is hanging in a local museum and asking why the museum would feature a piece like this if it was historically inaccurate. Mary acknowledged to the class that the student's question was a good one, and that perhaps they could reach out to the museum to get their perspective. In this one anecdote, it seemed that this student was not only attending to the historical inquiry questions presented to them within the unit and lesson, but also beginning to generate additional inquiry questions through this process.

Given the strong alignment between the decomposed practices and modeled lesson language of the professional development session with the observed lessons in Mary's class, I asked during our final interview about her thoughts regarding the utility of the PD activity. Mary expressed that the PD was very much at the forefront of her teaching while conducting the lessons. Mary found the decompositions of the historical thinking practices to be useful and something that changed her approach:

> "I loved that, and again, that's probably the social studies geek part in me because I had never done that before. So to see how you would break down a source that way, like, I never would have broken it down, I would have just explained to the kids. I'd feed it to

> them. Where I think that's what engaged them in it because they were the ones who had to source it and talk about it first and I wasn't spoon feeding them the content and what the source was." (Interview, 10/19/2022)

In this quote, Mary explained that breaking down the historical thinking practices – in this case, sourcing - into understandable parts was a novel way of approaching source work to her when it came to classroom use. By decomposing the practice within the PD session for Mary, I was able to help Mary understand the components of the practice such that she could do the same for her own students.

Another aspect of the PD that Mary found to be helpful was the modeling of how to address key vocabulary of the unit and providing student-friendly definitions. Mary said that she felt like the way that aspect of the unit was modeled during the PD had a substantial impact on the way she carried it out in her own work with students:

> "Some of the vocabulary and word wall are words that I might not have necessarily said, and that's important, like colonization, primary source and oh, corroborate. That's the best one, but like that would have been a word that, like, I'm just gonna explain that for the kids because they're not gonna get that. But the language that you used at the time I was like, oh, I hadn't thought of it that way. That would be an important word to introduce them, to even if I can't say it." (Interview, 10/19/2022)

Even though practices within the unit such as the use of a word wall and highlighting academic vocabulary are not necessarily historical thinking practices, the words used were often terms that are part of the practices themselves, such as *primary source* and *corroboration*. As such, the use of the word walls in these instances were part of the decomposition of the practices themselves, as we wanted students to be able to define the practices as part of their learning to employ them.

Within this context, the modeling of this element of the practices was a valuable component of the PD for Mary.

Though not immediately observable, Mary expressed that the ability to collaborate with fellow teacher during the PD activity was also valuable to her while enacting the unit. Mary believed that the conversations during opportunities to "turn-and-talk" about various aspects of the curriculum unit were helpful. She noted that being able to discuss potential answers to the questions, as well as talking with others about any modifications they would make, were two ways in which collaborating with peers during the PD was helpful in the classroom. Indeed, the design of the PD was such that participants were encouraged to collaborate to "think like a student" as parts of the modeling to engage in some informal rehearsal of the lesson, and during the PD there was time devoted to teachers generating anticipated student responses as part of that process. As such, Mary believed that these were activities she could not do in isolation in her current setting, and she suggested that more collaborative PD spaces be provided in the future.

Overall, Mary believed that the PD had a strong influence on her uptake of the unit within her classroom. She noted that she felt well prepared to engage students in historical thinking practices thanks to the decompositions. Further, Mary felt as if the modeling provided insights into how she would best engage with students during each part of the inquiry, and she felt comfortable supporting students during the unit when she had the experience from the PD to draw from as she made her way through the unit.

**Curriculum Material Use.** With the four main educative features of the curriculum in mind, I set out to understand how the curriculum materials may have influenced Mary's uptake of historical inquiry. When asked about the question generally, Mary believed that the

curriculum guide was helpful to her as she conducted the unit. She explained how it was used more intensely at first, but she referred to it less as time went on:

> "I felt I used it too much of as a crutch through the first lesson, but that could have just been my comfort with diving into a lesson like this because I felt like with the second and third lesson I was able to like kind of leave it up on the table and just go and reference it when need be, but I think it was helpful because everything that we would need was like all nice, nicely packaged together, the questions were there, but then you had those little tips for, you know, you might need to explain this to the kids." (Interview, 10/19/2022)

Mary was in fact observed with the curriculum guide in her had during the first lesson, referring to it almost in a manner as if it were helping her guide the next step. It was both interesting and helpful to hear from her after the fact that she was using it more to help her with the overall process and it was something she gained more confidence about as the inquiry and its routines and practices played out. I asked her to elaborate on this experience and Mary indicated that it was about confidence, but also more:

> "I think part of it was the comfort with knowing how the first lesson went. Like it went well, the kids were engaged where the first lesson like I have no idea how this is going to go with them, they haven't done something like this before, so I think part of it was I want to make sure I'm hitting all the pieces. And I knew after the first lesson, OK, that went well. I hit all the pieces and I saw how engaged the kids were, so I think it just made me more comfortable to say, OK, I think I can wean away from it a little bit more and go a little bit more with my own background knowledge and feeding off of what I was then noticing with the kids and where maybe they got stuck and what guidance they need after." (Interview, 10/19/2022)

This point about where Mary would pivot to as she got away from the guide was striking. Here, Mary indicated that feeling confident about the inquiry and the practices freed her up to trust her existing background knowledge of the topic and to use that capacity to better support students on an individual level, paying more attention to what students were doing and where they were in the learning process. This notion suggested that, at least for Mary, her experience with inquiry and comfort with the process and the features of historical inquiry could allow teachers to better attend to the needs of learners instead of trying to get a handle on the type of learning itself.

Beyond the 'what comes next' aspect of the guide, Mary alluded to the notion that the educative elements themselves were helpful in the moment. I asked her about this, and her first inclination was the speak positively about the student-friendly definitions element:

> "You had those little tips for, you know, you might need to explain this to the kids. I think the student friendly definitions were perfect because, like I said, I probably would have skipped some of the vocabulary words, I don't know how I would explain that to a fifth-grader. But you had that student friendly definition in there to be able to say, OK, it's there for me, this is how I'm going to post it up there for the kids." (Interview, 10/19/2022)

Perhaps due in part to her strong inclination to see the language arts element of social studies, Mary found the student friendly definitions to be the most helpful and appreciated the plug-and-play nature. When Mary admitted that she would have even skipped some of these key definitions all together had they not been made available, she seemed to be demonstrating their utility as being essential. Still, I asked about other elements such as connections to practices, and while Mary found them to be helpful here and there, she did not rely on them as much during the

execution of the unit. Mary supposed that features like connections to practices and the big ideas were highlighted so well during the PD that she did not need the written version as much.

Overall, the student-facing aspects of the curriculum unit, and the hard scaffolds contained therein, also seemed to foster historical inquiry when Mary was teaching the unit. It was the student responses to the text-dependent questions, for example, that Mary used when she probed student thinking with the "tell me more" instructions. Further, Mary explained that she was able to gradually release students to engage in sourcing as the unit went on due to the consistency of the text-dependent questions that for relatively standardized across each of the sources. Mary also found the sequencing of the sources within the student materials and the accompanying "putting it all together" sections where students were made to explicitly connect the sources back to the supporting question were particularly helpful in supporting students to engage in sustained inquiry. Mary expressed a belief that referring to those elements to help students develop their responses to the compelling question at the end may have led to a better student response than if students were simply asked to refer back to the notes in general.

**Historical Inquiry in Mary's Classroom.** When considering Mary's experience as a participant, I sought to understand how her personal experience could provide insights that would be valuable in the cross-case analysis process. As with Caitlin's case, I considered whether historical inquiry as defined by Barton and Levstik (2004) - asking questions, gathering and evaluating relevant sources, and reaching conclusions based on that evidence – occurred within her classroom.

Overall, elements of each aspect of historical inquiry were present in Mary's class, and those elements were consistently observable across the entire unit of study. With regards to the use of compelling and supporting questions, Mary not only adhered to the suggested use of the

questions (i.e., creating posters to frame and anchor the questions throughout the inquiry), but she also made frequent and explicit reference to each one. Mary used the whole class debrief experience at the end of each task to not only develop a consensus statement from student answers, but to also probe student thinking. It was observed in all three tasks that students even engaged in varying levels of student-to-student conversation facilitated by Mary. Additionally, as previously noted, there was considerable engagement within each source analysis task, with Mary working with students individually and in small groups to not only ensure that students were able to complete the task, but to probe and challenge their thinking along the way. Finally, students were able to construct evidence-based claims in response to the compelling question during the summative task. Mary felt that the students generally provided claims that aligned with the various positions explored in the inquiry and were supported by evidence. She indicated that she did need to direct students back to their prior work to help some students fully develop their claims with evidence and reasoning, but she was pleased overall that students were able to do so. Mary expressed disappointment with her chosen format for the task, a FlipGrid video, but this was because she wanted to provide more of a space for "debate" among the students in future iterations of the task.

When examining what made the inquiry a relatively successful venture in Mary's class, a few different possibilities deserve consideration. First, Mary entered this experience with existing dispositions that were favorable to engaging in historical inquiry. Her belief that students should engage with sources and "do" history was a clear connection with an inquiry framework. Even in our final interview, Mary's words demonstrated a commitment to this kind of learning beyond this inquiry, stating "we didn't do this lesson just to learn dates…it's critical thinking and they need to see the bigger picture" (Interview, 10/19/2022). This was likely also

influenced by the fact that Mary had experience with historical inquiry through some of the district resources and her participation in the Inquiry Design Model professional development a few years prior. However, Mary admitted that she was not entirely convinced that an inquiry using the IDM framework could be sustained well in a fifth-grade classroom due to time constraints, which was the same framework used to design this unit.

Similar to these factors, Mary's experience as a teacher – particularly as an ELA teacher and Consulting Teacher of Literacy – likely played a role in the success of this historical inquiry experience. Mary's consistent signals about how she saw the interplay between ELA and social studies, from her initial interview to the use of and reference to non-fiction text approaches during the source work, were a clear theme within Mary's case. Mary's use of these practices in concert suggest that teachers need not start from scratch to develop efficacy with disciplinary literacy practices if they can see how those practices connect to other disciplines with which they are already familiar.

**Cross-case Analysis**

After conducting within-case analysis of both Caitlin and Mary's experiences, I engaged in cross-case analysis to see what, if any, themes could be discerned analyzing both cases in comparison with each other. Analysis for themes that apply across both cases can be indicative that such themes may also apply beyond the two participants of this study (Ayres et al., 2003), which may be of considerable use in bringing the findings of these studies to future initiatives within the site context. Here, I present themes that emerged across both Caitlin and Mary's cases.

**The Historical Inquiry Unit Was a Welcomed Experience**. Both Caitlin and Mary had dispositions and prior experiences that were likely to lead to a warm reception of this curriculum unit, but it was not guaranteed. Caitlin and Mary had both voluntarily participated in district-

based professional development offerings in the past related to the use of inquiry in the social studies classroom. Caitlin had participated in a three-session in-service PD unpacking IDM inquiries for potential use in the classroom, while Mary had participated in a four-session collaborative effort to construct IDMs for future use. However, it was not a given that these prior experiences would automatically lead to each teacher feeling this unit was a good fit. Caitlin admitted that she barely implemented the IDMs that she examined in the PD offering, and Mary expressed skepticism during her initial interview about whether she thought IDM style inquiries – or even sustained inquiry in general – could fit within the confines of fifth-grade social studies structures. Still, each participant expressed generally positive attitudes toward the inquiry during their respective final interviews. For Caitlin, she found that the lesson aligned with her existing beliefs that history education should help teach students about the good and the difficult parts of our past, and that this inquiry met that desire. From a practical standpoint, Caitlin appreciated how the unit pushed student thinking:

> "I mean, I think it was a really interesting way to teach this concept. They kept saying they know a lot about the Wampanoag, but like they've really never gotten into fully like primary sources showing how unfairly they were treated. So I think it was really illuminating for them." (Interview, 10/14/2022)

Caitlin felt the unit was valuable for the way it used sources to help students see a more critical narrative about this topic than they had likely learned in the past. This experience was intentional, and the inquiry's compelling question pointed students to consider that effect on Native Peoples over time. For Mary, the unit was well-received for similarly student-focused reasons. She believed that her students were able to think more critically about the topic:

> "I like that it's more open-ended than just learning the social studies content, like we didn't do this lesson to learn the dates of King Philip's War and who won the war. It was to look at, well, what led us there and what was the outcome of it and then how does that impact them [Native Peoples]. So I think it's just more critical thinking and it's just more, more holistic, if you will, that they need to see the bigger picture and not just focusing on facts and dates." (Interview, 10/19/2022)

These two points about the importance of a critical thinking posture, along with each participant's expressed value of student-centered and active learning, meant that the unit was well-aligned with what each teacher wants for their students in a history classroom.

**ELA Practices as a Conceptional Bridge to Historical Thinking and Inquiry-based Practices**. In both cases, teachers seemed to rely on existing knowledge and understanding of practices in ELA to employ the historical thinking practices within this inquiry. When talking to both teachers during the initial interviews, each one referenced the workshop model employed in reading and writing classes, whereby the teacher starts with a mini lesson of direct instruction to orient students, then students work in small groups on the topic of the lesson before reconvening to tie it all together. Mary's case, the connections between ELA practices and the disciplinary literacy were strongest. In both interviews, Mary offered as much when describing how she approaches the teaching of history using ELA strategies:

> "Well, we did that in ELA and this is social studies time. We're using our reading strategies trying to get them to understand that, well, in social studies we might be reading an article that is nonfiction and we can use those same strategies that we did in reading to help us with this text. So trying to do that more often and that's one of my goals for this year, doing that more." (Interview, 8/8/2022)

Further, when asked in the final interview where this drive to teach social studies using ELA connections came from, Mary explained:

> "Talking with colleagues more over the past few years, and I think being in the CTL world certainly helped because I overheard so many people like, that's how. That's how the ELA people talk. So then to be able to bring that back into the classroom, like I just found myself naturally using that coming back this year with ELA that it just kind of actually just went into social studies." (Interview, 10/19/2022)

Observational data supported the idea that ELA strategies informed how Mary approached disciplinary literacy for history. When Mary's students were working on close reading, for example, Mary would often explicitly refer to non-fiction text strategies related to understanding what an "author" is doing when they say something or write a certain way. In these instances, though Mary offered that she was influenced by the decomposition of these practices in the PD, it is hard to deny that she also activated her own prior knowledge of adjacent practices from ELA to engage these historical thinking skills as well.

Though Mary was the clearer example of the link between ELA and historical inquiry practices, Caitlin also demonstrated similar cross-curricular connections. I observed Caitlin referring to some ELA strategies and concepts during the unit. For example, during one close reading task, Caitlin made a verbal connection to a research unit that students had done in ELA. In another instance, Caitlin connected sourcing in social studies to the journalism unit students were starting in ELA, explaining that good journalists get reliable sources. When I asked Caitlin about this and whether she made these connections intentionally and premeditated, she actually admitted that she did not consciously think of these connections. This suggests that, while Caitlin was not intentionally making these connections, she subconsciously referred back to her

pedagogical content knowledge of ELA as she conducted the historical inquiry unit. Taken together, it is clear that for both teachers ELA and their existing knowledge of the practices of that subject were part of how they navigated the practices associated with historical inquiry in this unit.

**Perceived Utility of Professional Development Over Educative Curriculum Materials.** Though the within-case analysis showed strong connections between aspects of the educative curriculum materials and enactment, both participants expressed a belief that the professional development was significantly more impactful on their teaching than the curriculum itself.

With Caitlin's case, this phenomenon seemed to have two dimensions to it. First, Caitlin felt that the PD itself was immensely helpful. She indicated that the modeling of the lessons and suggested teacher moves was particularly impactful, and the observational data supported this claim given the strong connections between how each lesson was modeled and how Caitlin enacted them in the classroom with students. So much so, as mentioned in the within-case analysis, Caitlin seemed to be replicating more often than adapting it for her own style. Second, Caitlin expressed a belief that the educative curriculum materials and teacher guide were too dense or cumbersome to use when it came time to enact the unit. Caitlin referenced time as a constraining factor and that the curriculum unit itself was just too much reading for her limited preparation time. However, Caitlin did find that the IDM blueprint was helpful to orient her to the lesson sequence and overall layout of the unit. Otherwise, Caitlin explained that she referred mostly to her own notes that she took during the PD session when preparing for the unit in her classroom, reinforcing the first idea that Caitlin found the PD to be impactful enough on its own.

For the most part, Mary also found the PD activities to be more impactful on her teaching during the unit than the curriculum materials. When discussing both elements in her final interview, Mary generated much more rich discussion about the PD compared to the educative curriculum materials and guide. Mary spoke in detail about the decomposed practices, the modeling of the lessons, and also spoke particularly highly of the chance to collaborate with other teachers during the session, albeit briefly. Mary believed that the PD allowed her to best understand the historical thinking practices and routines, and that she was able to draw from both her own content knowledge and the PD experience to engage students in the big ideas of the unit. Mary did, however, find the curriculum guide to be particularly useful during the beginning of the unit, explaining that since time had passed between the PD and enacting the unit – approximately four weeks – the curriculum guide helped to refresh her memory of what she gained from the PD. Further, Mary indicated that the educative element for student-friendly definitions was still helpful throughout the unit as well. Generally speaking, Mary relied on both the PD and the educative curriculum materials for her enactment, but her reliance skewed toward the professional development.

**Challenges and Opportunities for the Sustainability of Historical Inquiry.** The last significant theme across both cases was the perceived sustainability of this model for update of historical inquiry within each teacher's classroom. Given that an aim of this project had been to develop supports that foster uptake both within the unit and ideally beyond it, I asked each teacher about whether they would continue to teach historical inquiry in this manner moving forward. Caitlin's response was possibly the clearest: "are you going to give me some sources?" Caitlin elaborated on this somewhat tongue-in-cheek response by explaining that having the sources and all the accompanying scaffolds provided to her like they were in this unit was a

major factor in whether or not she feels comfortable engaging students in historical inquiry. During the interview, she did realize that the district curriculum maps contain compelling and supporting questions for each unit that she could use more intentionally having been through this process. However, Caitlin believed that without being provided source that are ready for the fifth-grade classroom – particularly primary sources – she doubted whether she would be able to sustain a model of historical inquiry in her classroom moving forward.

When asked about this issue of sustainability, Mary expressed similar sentiments. Mary desired to continue to employ historical inquiry the way that she did during this unit but she believed that it would be a considerable lift:

> "I would love to - whether I actually did it or not would be another thing, because I think on top of it, it would take a lot of work to be able to find the sources and develop those questions. It would be a lot of planning and to do the amount of work that goes into this on top of planning for ELA and everything else that we do, I don't think I would be consistent with it and I don't know if I would do it justice. I don't know if I would get out of it what I wanted the kids to get out of it out of it because I don't think I'd have enough time to put into it. I think it's something I definitely would like to try but again I think it comes down to having those sources available." (Interview, 10/19/2022)

In this quote Mary laid out a few different aspects of what would make continuing with this model of historical inquiry difficult. First, Mary believed that historical inquiry of this nature takes considerable planning time and she felt that ELA takes up so much of what she has for planning time that she worries she would not be able to adequately plan for social studies with what's left. Second, Mary reiterated that finding good sources and preparing an inquiry around those sources is also a considerable obstacle. Ultimately, Mary wanted to "do it justice" and

believed that this would be difficult to do without some sort of provided support through resources or time. When compared with Caitlin's responses, it seemed that both Caitlin and Mary are interested and willing to teaching with a historical inquiry model, but they need the curriculum provided for them if it is going to happen with fidelity.

**Connections to the Literature**

Returning to the literature that informed this study, it is clear that the results of this investigation aligned with recurring themes about historical inquiry, educative curriculum materials, and professional development.

With regards to curricular factors that impact historical inquiry, much of the literature review examined recent research on the Inquiry Design Model. Similar to those findings that showed elements of inquiry within IDM classrooms (Thacker et al., 2018), the use of the IDM framework in this study seemed to have aided teachers in carrying out historical inquiry, particularly through the sequencing nature of the blueprint from compelling question, to source-based formative tasks and supporting questions, to summative task that returns to the compelling question. Much of the research on teacher use of the IDM, however, notes that teachers struggle to develop compelling questions (Mueller, 2018) and that background knowledge on behalf of the teacher is helpful for enacting an IDM inquiry beyond the boilerplate blueprint (Thacker, 2018). In this study, teachers did not need to develop either the compelling or supporting questions, nor were they required to develop the formative tasks or find, sequence, adapt, and scaffold the sources. Rather, all of this was done by me as someone who is versed in both the content and historical inquiry. This seemed to be an important aspect, as teachers did not need to wrestle with the genesis of an inquiry and could instead focus their efforts on understanding the curriculum at hand. Consistent with Muetterties et al.'s (2020) study, providing pre-designed

hard scaffolds and source logic to teachers allowed for teachers to focus on enactment instead of design.

The literature regarding the *Reading Like a Historian* (Reisman, 2012) curriculum design features of central historical questions, historical documents, and discussion were also evident in this curriculum unit and central to the historical inquiry experience. The curriculum particularly centered the use of historical thinking skills such as sourcing, contextualization, corroboration, and close reading to bring students along to evidence-based responses to the central or compelling questions. Similar to Reisman's (2012) findings, using classroom-ready materials as a guide for these practices was beneficial in the study at hand. Further, *Reading Like a Historian's* emphasis on explicit strategy instruction appeared to be a key factor in both teachers' belief that there was strong student engagement in the historical inquiry process.

When examining other pedagogical factors besides explicit strategy instruction, Saye and Brush's extensive work (Saye & Brush, 1999, 2002, 2004, 2006) regarding scaffolding of historical inquiry was particularly instructive when analyzing the results of this study. Similar to the findings by Saye and Brush (1999, 2002, 2004, 2006), the hard scaffolds within the unit were helpful in fostering inquiry for both teachers, as they relied upon these scaffolds to guide students in their thinking. Also similar to findings by Saye and Brush (2006), one teacher seemed more effective at employing soft scaffolding in the moment compared to the other teacher. In this particular case, it seemed that factors such as experience as a literacy teacher and more content knowledge drove some of this difference, though more study of this phenomenon would be helpful.

Though the teachers credited the professional development more than the educative curriculum for their successful update of historical inquiry, the findings were consistent with

Davis et al.'s (2017) findings in a few ways. First, Davis et al. found that much of the measured uptake of practices related to educative features took place in the third year of their programs, meaning that it may be unrealistic to think that educative features could be judged either a success or failure after one iteration. Second, though some educative features in this study such as student-friendly definitions were perceived to be more helpful than others, the participants suggested changes for future iterations that would align with other educative features that were not utilized in this first version of the curriculum. For example, Davis et al. found that teachers learned from seeing rubrics and exemplars that demonstrated the desired practices, and Caitlin suggested that similar tools would be helpful to her. As such, more consideration should be given to exploring other educational features from Davis et al.'s work in future versions of this curriculum.

Lastly, the literature regarding professional development was instructive to the analysis of this study. Given the small scope of this study with one PD session to launch one historical inquiry unit, it was difficult to truly explore whether a sustained version of this model could be effective given Kennedy's (2016) focus on long duration PD events of one year or more, or Desimone's (2009) findings that effective PD should be of considerable duration in both span of time and number of hours spent in the PD. Still, the PD experience in this study seemed to align with some of what Kennedy found to be effective such as facilitation by someone who has experience with both teachers and the program and tapping into teacher interest and motivation to drive the learning. This PD offering, though short in duration, also had other features that are common of effective PD, such as being subject-matter oriented, utilizing modeling, and engaging teachers in active learning through approximations (Darling-Hammond et al., 2017; Desimone, 2009). Similarly, Callahan et al.'s (2016) findings that while interactive and collaborative

professional development did not immediately foster update of the practices they desired from teachers, the model itself moved teachers closer to such practice and the interactive experiences within that PD were a contributing factor. Similarly, the use of decompositions and modeling within the professional development in this study seemed to move practice in some observable way.

Lastly, it is important to note that there were findings in this study demonstrating the importance of dispositions on how each teacher took up the practices of historical inquiry. Both teachers expressed beliefs and dispositions about history education and teaching in general that were aligned with the principles of historical inquiry, yet neither teacher used historical inquiry with any level of consistency before participating in this study. This was consistent with Martell's (2019) findings that teachers who had inquiry-aligned beliefs struggled to implement historical inquiry if their school context was not supportive of such teaching (e.g., professional development on the approach, or a culture of historical inquiry within the school). This study provided a glimpse into what is possible when teachers who possess these beliefs are afforded the resources and support necessary to sustain historical inquiry in their teaching.

**Implications**

Given the findings of the within-case and cross-case analysis, as well as the identified connections to the established literature, a few implications can be made about the importance of this study for the site context of Bradford Public Schools. Given that this study was also influenced by design research principles (Thacker et al., 2018) that encourage refinement and multiple iterations of enactment and study, implications should also inform future work on this particular unit and PD experience. In particular, the utility of practice-based professional development for in-service teachers, considering how pedagogical content knowledge from other

subjects could foster similar knowledge for history, and exploring the interplay of the educative curriculum materials and professional development in future iterations of this project all warrant consideration.

Given each participant's strongly positive attitudes about the decomposition of practices and the approximation of lessons through modeling during the professional development, it is clear that practice-based professional development was an asset of this experience. Though Ball and Cohen's (1999) call for professional learning that is centered in practice and includes the use of materials and work that depict what should take place in the classroom is not a new concept, this model has been slow to be realized for elementary social studies teachers both within the Bradford Public Schools and beyond. The participants in this study made frequent reference to the notion that engaging in such as model of professional learning was a key factor in their uptake, demonstrating that these elements of professional learning are helpful to in-service educator – especially when those in-service educators are learning new practices such as disciplinary practices for the first time. As such, continuing to develop and implement professional learning offerings that center the practices of the discipline would be helpful in fostering update of historical inquiry in elementary social studies classrooms.

Building on these findings about the effectiveness of the PD model, more consideration should be given to what made this PD experience successful given that much of the literature of professional development notes that one-off PD is not a particularly effective model of professional learning. The PD experience in this study was designed to be orienting in nature, almost like the start of what would ideally be a sustained professional learning experience beyond just the first curriculum unit. Perhaps some of the elements of successful PD suggested by Kennedy (2016) existed in this professional development offering: the PD was intellectually

engaging, participants were motivated to improve their own practices, and participants may have found to the facilitation to be helpful due to my experience as a history educator. Kennedy (2016) suggested that facilitators with "long histories of working with teachers, … [who are] very familiar with teachers and with the problems they face, and based their programs on their own personal experience and expertise" (Kennedy, 2016, p. 973) are often more successful. More consideration and investigating should be given to what made this particular PD session successful in the eyes of participants and how that can be maximized moving forward, with particular consideration given to scalability. If this PD experience was successful for these teachers, exploring what it would take to emulate this success beyond this small sample is an important part of bringing the findings of this study to future practice.

Additionally, this study indicates that pairing practice-based professional development with a curriculum that is to be enacted – versus providing isolated or one-off exemplars to demonstrate the practices – is also something of value for teachers. Though teachers frequently cited the PD activities as paramount to their teaching, there were strong connections between what was outlined in the educative curriculum materials and what played out in the classroom. The simplest explanation for this connection was that the PD session was organized around the educative curriculum itself. The big ideas, student-friendly definitions, connections to practices, and anticipating student responses were all addressed through the PD facilitation. As such, teachers who participated in the PD were less inclined to rely on the educative curriculum because they had essentially already processed the curriculum through those experiences. Furthermore, both teachers used the educative curriculum to some extent, particularly as a reference since time had passed between the professional development and when teachers enacted the curriculum in their scope and sequence. When asked, both teachers supposed that –

had they not participated in the PD – they would have likely been more reliant on the educative curriculum materials. As such, additional consideration should be given to the interplay of the two elements to find the right balance between providing enough support across both features without overwhelming teachers or wasting curriculum design and planning time. It is possible, for example, that different models of professional learning would be helpful in supporting teachers who do not have the ability to engage in the combination of PD and educative curriculum materials that was provided in this study. As such, more consideration should be given to how different combinations of the PD and educative curriculum could still serve the same goal of uptake of historical inquiry.

Finally, whether through the educative curriculum elements or within practices-based professional development, an important implication of this study is that the existing pedagogical knowledge and/or pedagogical content knowledge of teachers from other subjects should not be ignored and should probably also be given consideration for future iterations of this endeavor. Teachers in this study clearly and consistently drew upon practices from ELA when conceptualizing – and sometimes even when enacting – historical thinking practices. Unlike pre-service educators who are learning both content knowledge and pedagogical knowledge on their way to pedagogical content knowledge, these in-service elementary teachers have an existing professional knowledge base that clearly impacted the way they approached building new knowledge in a new discipline. Identifying and connecting these various knowledge bases as part of the design process for both the professional development and the educative curriculum features could make these tools even more intellectually engaging for teachers.

## Limitations

As with any study, there were limitations that may impact the findings of this study. One limitation was the inability to observe the prior classroom practices of both teachers. Due to time constraints at the end of the previous school year and the timing of IRB approval, it was not possible to conduct baseline observations of each teacher's practices before engaging in this study. As such, it is possible that conclusions drawn about any changes in their practices may be limited in nature. Still, I designed the semi-structured interview protocol to ask questions and anticipate possible follow-up conversation that would provide a description of each teacher's self-reported practices before engaging in this study. Another limitation of the study was the roles I hold as both researcher and curriculum coordinator. It is possible because I created the units, conducted the professional development, and continue to work with the teachers beyond this study that they may have felt like they needed to hold back in some areas of feedback about the usefulness or the activities and materials, which would potentially impact any conclusions drawn about perceived utility and usefulness. To minimize this effect, I was clear throughout the process that their honesty and forthrightness was not only welcomed but would also help me to better serve teachers in my capacity as a curriculum coordinator. Lastly, a clear limitation of this study's findings is that I did not use a validated measure of effectiveness for the quality of the desired practices. Though this study did not seek to quantify their performance, this does open the findings up to a level of subjectivity. To address this limitation, I sought to demonstrate that my analysis was based in the existing research base and to demonstrate my proficiency in understanding and analyzing historical inquiry and its associated practices.

## Conclusion

Returning once more to the research questions that drove this study, it seems clear that historical inquiry took place in both Caitlin and Mary's classrooms. The presence of historical questions – both compelling and supporting – was evident, and tasks that required students to apply historical thinking skills allowed for them to develop evidence-based responses to these questions throughout the unit. Though this was by design the way the unit was developed and sequenced, it was not a guaranteed that this would take place with a certain measure of success. The within-case and cross-case analysis suggested that both the educative curriculum materials and the practice-based professional development had an impact on each teachers' experience enacting historical inquiry, but both teachers indicated that the PD was more impactful. Moving forward, there are encouraging possibilities to leverage both the PD and the educative curriculum to build on the promising findings of this study.

## Chapter 5: Recommendations

This study identified a problem of practice within a local school district context at the Bradford Public Schools. Particularly, this study looked for ways to support teachers with the uptake of historical inquiry given that observational and anecdotal data within the district showed that history instruction at the elementary level was not typically rooted in such practices. Particularly, I sought to investigate how the use of educative curriculum materials in tandem with practice-based professional development could support teacher uptake of the Massachusetts History and Social Science Practice Standards through historical inquiry. The study focused on two activities: a practice-based professional development workshop for grade five teachers that sought to support the uptake of a historical inquiry curriculum unit, and teacher use of the unit itself, which featured educative elements to assist the teacher during the execution of the unit in the classroom. By focusing on these two activities, this investigated whether, and to what extent, each of these elements supported teacher uptake of historical inquiry and to also explore the possible interlocking nature of the two elements together. The study addressed the following research questions:

**RQ1:** In what ways, if any, does participation in curriculum-based professional development foster teacher uptake of historical inquiry, particularly:

g) Decomposition and modeling of practices during PD; and

h) Educative curriculum elements

**RQ2:** To what extent, if any, do the practices of historical inquiry transfer to the classroom?

After conducting initial interviews with two teachers, analyzing their participation in the professional development session, observing their enactment of the unit within the classroom,

and conducting final interviews, I analyzed these data to develop the findings and articulate the implications outlined in the previous chapter.

In this chapter, I present recommendations (Table 5.1) for the Bradford Public Schools based on the findings and implications of this study. Given my role as the K-12 Social Studies Coordinator for the district, the audience for these findings is myself along with my fellow administrators within the district such as the building principals, assistant superintendent, and superintendent. Because the study involved an educative curriculum unit and associated professional development, I have organized recommendations into those sections accordingly. Since conducting action research on this problem of practice yielded valuable findings, the district may be well served to consider further research as this project evolves.

**Table 5.1**

*Recommendations for the Bradford Public Schools*

| Curricular and Instructional Recommendations | |
|---|---|
| Recommendation 1.1 | Revise the Substance of the Existing Unit Based on Findings of the Study |
| Recommendation 1.2 | Articulate Key Practices Within and Across Units |
| Recommendation 1.3 | Map Connections Between History Practices and Practices in Other Subject Areas |
| Recommendation 1.4 | Expand the Educative Elements to Include Exemplars and Rubrics |
| Recommendation 1.5 | Engage in Curriculum Mapping to Identify Critical Areas for Additional Unit Development and to Foster Vertical Alignment of Practices |
| **Professional Learning Recommendations** | |
| Recommendation 2.1 | Refine and Expand the Orientation PD Experience |
| Recommendation 2.2 | Provide More Designated Planning Time for Social Studies |
| Recommendation 2.3 | Develop More Pathways for Historical Inquiry Professional Learning |
| Recommendation 2.4 | Develop Teacher and Administrator Capacity for PD Leadership |
| **Recommendations for Future Research** | |
| Recommendation 3.1 | Design Future Research to Examine Student Participation |
| Recommendation 3.2 | Design Future Research to Examine an “Either/Or” Approach to Professional Development and Educative Curriculum Materials |

## Curricular and Instructional Recommendations

The curriculum unit was a major component of this study. The curriculum unit is designed with research-based principles to foster historical inquiry. It engages students in historical inquiry through a compelling question, formative student tasks framed by supporting questions, and the analysis of disciplinary sources using historical thinking practices. To support teachers in enacting the unit, the teachers' guide for the unit features a series of research-based educative elements that serve to support teacher understanding of the practices and content knowledge necessary for historical inquiry. Given the centrality of these curriculum components, I provide a considerable number of recommendations for their future use.

### *Recommendation 1.1: Revise the Substance of the Existing Unit Based on Findings of the Study*

While the findings of this study indicate that the unit was well received by teachers within the classroom, observational data and feedback from the teachers yielded areas for consideration when revising the unit for future use. In particular, the unit would benefit from additional scaffolds and modifications for students with disabilities and English learners. Adding elements consistent with the district's Sheltered English Immersion approach to teaching EL students in the general education classroom should boost the accessibility of the unit for students. For example, providing teachers with academic vocabulary glossaries that not only include the student-friendly definitions of those terms but also provide native language translations of the terms and visual cues about their meaning would be helpful. Additional directions to teachers regarding ways to differentiate for student readiness (such as the use of pre-assessment or examples of additional scaffolds to use), or advice on how to effectively differentiate content

without undermining the inquiry design aspect of the unit would likely also be welcomed by teachers.

The unit could also benefit from additional work to make the sources more inclusive of Indigenous voices. After receiving feedback about the lack of Indigenous sources within the first draft of the unit, I incorporated a contemporary account of how Thanksgiving is perceived relative to the actual historical evidence from a Wampanoag historian. This video was helpful for the framing of the big idea within the task. Teachers felt as though students were quite receptive to the teaching point that Indigenous voices are often missing from the historical records of this time period and why that matters. As such, future iterations of this unit should seek to incorporate more Indigenous perspective. For example, an Indigenous perspective on the legacy of King Philip's War would help students examine the importance of the compelling question beyond the time period examined. Even where the primary source material is limited, secondary sources by Indigenous historians such as the one included during this round of implementation help students examine a more complete understanding of the past.

***Recommendation 1.2: Articulate Key Practices Within and Across Units***

Future iterations of the inquiry unit should be clearer in articulating the key practices of historical inquiry and the elements of each practice. The unit focuses on key practices for historical inquiry: the use of compelling/supporting questions, historical thinking skills for source work, and developing evidence-based arguments using evidence from the text. While many of these were baked into the unit through sequencing, hard scaffolds, etc., some practices such as those involving historical thinking were explicit and routine based. Teachers appreciated the decomposition of these practices during the professional development, but the practices were only apparent to students to varying degrees during the unit. For example, student engagement in

sourcing became quite routine during the unit, but other aspects of historical thinking such as corroboration and contextualization were not as forefront. To help teachers in helping students in developing their skill in these practices, future iterations of the unit should be more explicit in naming and enacting the practices. For example, the development of a set of practices framed as "what good historians do" should be clearer about what routines are expected of students. The use of anchor charts for each practice could also help teachers as a handy reference for what actions and thinking routines go into engaging in each practice. This should strengthen the sustainability of these practices beyond the unit at hand. If these practices are expected in all inquiry based history units, teachers could better support students to become familiar with and more proficient in these practices over time thanks to the consistent language and routines.

***Recommendation 1.3: Map Connections Between History Practices and Practices in Other Subject Areas***

It was clear from the findings of this study that both teachers relied on their own pedagogical knowledge and pedagogical content knowledge from other subjects – namely English Language Arts – to process and enact the practices for historical inquiry. As such, future iterations of the educative elements of this unit should leverage this sensemaking process to better foster uptake of practices for historical inquiry. Mapping the practices within ELA that teachers use with students in each grade would be a logical first step in that process. For example, examining how teachers instruct students to engage with non-fiction text in ELA could be an entry point for building efficacy in historical thinking skills given similarities across disciplines with elements such as close reading. The connections also need not be exclusive to ELA. For teachers who also teach science, engaging teachers' prior understanding of phenomena-based inquiry may help teachers understand how to engage students in inquiry

around a compelling question. The first step in this work is to map these practices by subject and grade level. After mapping the landscape of the various practices, identifying areas of considerable overlap in the nature of the discipline-specific practices will yield insights into which practices are most applicable for historical inquiry. Lastly, the educative features should explicitly describe the connection between the overlapping practices as a conceptual bridge to how the practice should be enacted in a history classroom, such as illustrating the connecting elements of non-fiction text reading to close reading in history or comparing and contrasting similarities and differences between investigating science phenomena and central historical questions.

***Recommendation 1.4: Expand the Educative Elements to Include Exemplars and Rubrics***

Though the teachers relied more on the professional development than the educative features during unit enactment, they did find the features helpful while being exposed to them during the modeling and in some cases, they also found them helpful in the moment during teaching. Though at least one participant mentioned that the unit guide was dense given her limited time for planning and preparation, she also expressed a desire for other educative elements that were not present. As such, future iterations of the unit should try to strike a balance between not adding too much additional matter to the unit while also identifying and building out additional educative features that would be helpful to teachers. For example, one of the participants expressed a desire for exemplars of student responses and student work to better understand how to guide students to meeting the goals of historical inquiry. Providing teachers with more descriptive rubrics, more noting of "look fors" in student responses and discussion and providing samples of student work could all bolster the educative element of the unit guide.

### *Recommendation 1.5: Engage in Curriculum Mapping to Identify Critical Areas for Additional Unit Development and to Foster Vertical Alignment of Practices*

A clear and consistent message from both participants was the challenge of sustainability. While each participant found the unit to be instrumental in their uptake of historical inquiry, they both admitted that without being provided with additional units of this nature they may not continue to teach historical inquiry with this level of implementation. Given the time constraints on teachers, particularly with regards to planning for social studies, the burden of producing additional historical inquiry units should not fall exclusively on classroom teachers. Instead, the curriculum coordinator should take the lead on developing additional units for teachers to use in their classrooms. Since this is a time intensive process for even an expert curriculum leader, mapping the curriculum scope and sequence to identify critical need areas for inquiry units should be the first step in this process, using data such as actual curriculum pacing and coverage performance and teacher input to drive these decisions. For example, both teachers in this study identified the American Revolution as an area where they felt like they had more to work with for resources and/or had a stronger understanding of the content knowledge for that topic. On the other hand, both teachers felt like this unit was particularly helpful because they had not adequately addressed this topic in the past due to both a lack of resources and content knowledge about the topic. The next inquiry units should be developed for additional topics where teachers identify gaps in resources and content knowledge to strengthen teacher practice and student understanding. Ideally, these units will also be spread out across the scope and sequence to foster some vertical alignment of historical inquiry practices and spiraling the complexity of the work over time within the grade level and beyond.

## Professional Learning Recommendations

The findings of this study showed that the professional development activities were perceived as being impactful to the teachers when it came to taking up historical inquiry in their own classrooms. As such, it is important to not only replicate the successful elements of the professional development in future cycles of this work, but also to build upon these strengths to develop greater capacity to impact history teaching and learning throughout the Bradford Public Schools. In this section, I offer a series of recommendations related to professional learning.

### *Recommendation 2.1: Refine and Expand the Orientation PD Experience*

Given the expressed satisfaction with the professional development workshop by both participants, it would serve the Bradford Public Schools well to offer this type of orientation PD that orients teachers to the discipline and to historical inquiry. The PD session laid a foundational understanding of historical inquiry for all of the attendees, including the two participants in this study. The impact of this PD offering was that there was consistent language and routines for historical inquiry across multiple schools. This work should continue to ensure that all eight elementary schools in the district use this particular approach to historical inquiry consistently so that no matter where a student lives in the Bradford Public Schools district, they are receiving an ambitious history education experience.

Further, the launch PD should be expanded to a multi-day workshop. For the purposes of this pilot, the PD was condensed into one four-hour offering. Because of the limited time with participants, decisions were made to focus on key aspects of the unit when it came to decomposing practices or modeling them within the unit. Research shows PD that is longer in duration in both hours and amount of sessions has a positive impact on teachers (Desimone, 2009). In an expanded version of this PD offering, teachers should be more active participants

and the modeling would be more in-depth, with a "student hat/teacher hat" consideration of each of the three tasks and opportunities for teachers to even conduct their own rehearsals of the lessons – a powerful strategy for approximating practices in preparation for classroom delivery (Davis et al., 2017). Further, each of the different historical thinking practices featured in the unit could be given its own thorough decomposition and consideration, especially in light of recommendations 1.2 and 1.3 regarding articulation of practices and connecting practices across disciplines. These action steps can serve to enhance the findings that the PD session was a driving factor in the uptake of historical inquiry.

***Recommendation 2.2: Provide More Designated Planning Time for Social Studies***

The findings of this study indicate that teachers felt they have insufficient planning time for social studies compared to other subjects. Both teachers expressed frustration that much of their time during planning was devoted to tested subjects such as ELA. This lack of planning and collaboration time for social studies is a real barrier to historical inquiry. Both participants explained that finding appropriate disciplinary sources and adapting them for use within their classroom was a particularly time and labor intensive endeavor for which they have insufficient preparation and planning time. This results in less historical inquiry since teachers fall back on whatever is freely and easily available regardless of quality or alignment with inquiry practices. Further, each participant explained that the current lack of planning time for social studies impacts their ability to effectively consume and process the educative curriculum materials because they require considerable reading and processing, and time is simply too scarce. As such, it is imperative to the update of historical inquiry in the Bradford Public Schools that teachers are afforded substantial planning time designated to social studies.

This improved time for planning could take place in a few different ways. First, building principals should work with teachers to identify building-based collaboration time that could be conducive to planning for social studies such as monthly grade-level meetings or breakout sessions within monthly faculty meetings. Once these opportunities are identified, principals should be intentional in communicating to teachers that those times are devoted to social studies planning so as to ensure that there is not too much creep of other subjects by setting goals for social studies planning and accountability structures to meet those goals. Additionally, principals should encourage teachers to choose social studies planning for their teacher-directed Professional Learning Community (PLC) time. While teachers are contractually afforded great flexibility in self-selecting the focus of these PLC meetings, principals are allowed to offer suggestions. By offering social studies as a suggested course of work, principals are signaling that work in this subject area is equally important to the subjects that teachers spend the most time on in collaboration settings. This work could also include guides and scaffolds provided by the district coordinator to assist teachers in the self-guided work. Finally, some of the smaller schools in the district such as Coastal Elementary and Northern Elementary departmentalize certain subjects at the upper grades in a manner that makes for only one teacher within a grade level responsible for teaching social studies. To address this isolation, principals and the curriculum coordinator should collaborate to offer cross-district spaces for collaboration, particularly during in-service professional development days.

***Recommendation 2.3: Develop More Pathways for Historical Inquiry Professional Learning***

Given the aforementioned challenges regarding time and availability for social studies planning and professional development, along with the varied needs and talents of teachers when it comes to fostering historical inquiry, the district should work to provide multiple ways of

providing professional learning to teachers in support of historical inquiry. Still, the professional development should go beyond just an initial orientation to historical inquiry practices and unpacking just one unit and instead be an ongoing professional learning experience. Providing similar sessions before each subsequent unit will not only orient teachers to the blueprint of the next unit or boost their understanding of the big ideas specific to the topic, but also give teachers more practice and experience in rehearsing and approximating the practices, which will enhance teacher self and collective efficacy for historical inquiry. Designing PD models that utilize job-embedded contexts could also support teachers in more tailored ways (Darling-Hammond et al., 2017). During this study, it seemed as if the final interview process also served as a de facto coaching cycle element. Teachers reflecting on how the inquiry went allowed for insights to be identified during the discussion that both teachers said they would consider for future iterations of the unit, such as ways to dig deeper on student thinking through follow-up questioning. Providing teachers with intentional reflection protocols could enhance the experience and complete the recommended cycle of professional learning for high-leverage practices as prescribed in the TeachingWorks model that goes from introducing a practice, to approximation and rehearsal, through evaluating and discussing enactment in the classroom (TeachingWorks, 2022).

Understanding that providing this much professional development time might be unrealistic in a district capacity sense, the district should also seek to develop other formats for teachers to engage in the same professional learning elements without relying on a model that depends on substitute teacher coverage and in-service availability. Aspects of the professional development activities could be redeveloped into asynchronous learning modules with video components, examples of work to examine, and prompts that help teachers internalize a rehearsal

protocol to prepare for the unit without the affordances of getting together in a large group. These modules could also have a submission component whereby teachers could upload or share video of their work on the practices for feedback from the coordinator. Teachers could also work with principals to arrange for shorter building-based sessions that focus specifically on the parts of the professional development that are more difficult to replicate in an asynchronous model. While ongoing in-person professional development is the idea approach, we should challenge ourselves to not be limited by the constraints that typically hinder sustained professional development in the Bradford Public Schools.

***Recommendation 2.4: Develop Teacher and Administrator Capacity for PD Leadership***

Continuing with the considerations about sustainability, Bradford Public Schools should also work to build both teacher and administrator capacity to support the uptake of historical inquiry. The two teachers in this study demonstrated dispositions and held beliefs that made it likely they would be receptive to an inquiry-based approach to history. As such, their dispositions likely aided their uptake of historical inquiry practices. Teachers like Caitlin and Mary may be ideal candidates to develop the capacity for teacher leadership and facilitation of professional learning regarding historical inquiry. Supporting these types of teachers to facilitate professional learning communities (PLCs) may alleviate the pressures of time and resources when it comes to providing effective social studies professional development at scale (Darling-Hammond et al., 2017). Teacher leaders could be trained to facilitate coaching cycles, take lead on site-based professional development, or even serve as on a design team to work with the coordinator to deepen their content knowledge and develop future units and bring that deeper understanding from the development process to inform their work with colleagues.

Additionally, principals can play a key role in fostering historical inquiry practices across the district. Principals should engage in their own version of the orientation PD provided in this study as a means to understand the practices and routines necessary for historical inquiry. Ongoing support for principals from the coordinator could also include engaging in non-evaluative instructional walks through history lessons and debriefing observations, as well as the use of a "look fors" document that assists principals in independently spotting and evaluating the desired elements of historical inquiry. Given the decentralized and geographically spread out nature of elementary schools in the Bradford Public Schools, this type of distributed leadership could serve as an instrumental component in ensuring implementation consistency throughout the district.

## Recommendations for Future Research

The process of designing and implementing this study, along with analyzing the results and developing findings, was a powerful exercise for addressing the problem of practice. Ideally, this will be the first in multiple cycles of inquiry toward the problem of practice using the findings of this study to inform future inquiry. In addition to the recommendations regarding curriculum and professional development, I also offer a few recommendations for area of further investigation.

### *Recommendation 3.1: Design Future Research to Examine Student Participation*

Though the intention all along was for this study to focus on the teacher experience, the observational components of this study made clear that there is ample work to be done in understanding historical inquiry through the experiences of students. Future iterations of action research regarding update of historical inquiry should accordingly include students in the process. Interviews with students, for example, could help triangulate whether the historical

inquiry process as perceived by teachers is the same for the students experiencing the lessons. Taking careful note of student participation within lessons could also produce fruitful insights as to whether the practices are being employed in a manner whereby student participation matches desired outcomes. Student work analysis could also be a powerful tool for measuring whether the stated goals of historical inquiry are being met. Simply put, students are *the* stakeholder when it comes to historical inquiry, and their insights, experiences, and products could be valuable to future iterations of this inquiry process.

***Recommendation 3.2: Design Future Research to Examine an "Either/Or" Approach to Professional Development and Educative Curriculum Materials***

During the study, it became clear that – at least for these two participants – the professional development was more impactful than the educative curriculum materials. However, both participants offered to some extent the ponderance that had they not been part of the professional development, they would likely have relied on the educative curriculum materials more than they did. This insight brought up an interesting idea: could future research about whether participating in one of these aspects and not the other yield important insights into their individual utility? The conceptual framework for this study, along with the research base, support the approach of pairing the professional development with the curriculum for a variety of reasons that were previously explained in this project. However, there are demonstrable challenges within the Bradford Public Schools to offering both of these elements together. It may be worthwhile to investigate each one in isolation as a way to try and work around the challenges of providing both to teachers, though we should still seek to implement the entire experience for as many teachers as possible.

**Reflection**

Something that is clear about problems of practice is that they are often persistent. This persistence can often lead professionals to throw their hands up in the air and resign themselves to the notion that problems of practice cannot be addressed. I admit that I may have succumbed to this type of thinking prior to engaging in this study. But the systematic and intentional inquiry of this problem of practice was a rigorous and rewarding experience that showed the value of well-designed practitioner research. In this study, I was able to use the knowledge base regarding historical inquiry and professional development to create, implement, and evaluate a possible solution to this problem of practice that I likely would not have been able to accomplish had I not conducted this study. And the reward for that hard work were very much worth the effort. I saw teachers become increasingly confident in and proficient at implementing historical inquiry in their classrooms. I also saw students engaging in history lessons in a way that was rigorous, authentic, and engaging. I also felt that I developed an even stronger passion for working with both teachers and students to achieve these goals of implementing historical inquiry at the elementary level. This study was impactful both personally and professionally, and I look forward to continuing this work alongside the educators and students of the Bradford Public Schools.

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## Appendix A: The Massachusetts History and Social Science Practice Standards

PS1. Demonstrate civic knowledge, skills, and dispositions

PS2. Develop focused questions or problem statements and conduct inquiries

PS3. Organize information and data from multiple primary and secondary sources

PS4. Analyze the purpose and point of view of each source; distinguish opinion from fact.

PS5. Evaluate the credibility, accuracy, and relevance of each source.

PS6. Argue or explain conclusions, using valid reasoning and evidence

PS7. Determine next steps and take informed action, as appropriate.

## Appendix B: Interview Protocols

### Initial Interview Protocol

***(Stated on the audio recording)***

**Date:**

**Time:**

**Participant:**

**Location:**

**Research Questions:**

| |
|---|
| **RQ1. In what ways, if any, does participation in curriculum-based professional development foster teacher uptake of historical inquiry, particularly:**<br>a) **Educative curriculum elements**<br>b) **Modeling and rehearsals of practices within PD**<br>**RQ2. To what extent, if any, do teachers engage in elements of historical inquiry in the classroom?** |

**Introduction:**

I want to begin by thanking you for agreeing to meet with me and engage in this interview about your history education practices. As we discussed, the purpose of this interview is to get a sense of how you currently teach history and social studies, and what you find to be helpful in doing so. Your participation is completely voluntary, and you may decline to participate at any time. Also, I would like to record the audio of this interview to ensure accuracy and review your responses at a later date. This audio will be stored securely and will not be made public. After this interview is transcribed, I will destroy all copies of the audio. *Is it OK with you if I record? Do you have any other questions or concerns about the purpose of this interview or the interview process at this time?*

As you know, I am interested in understanding how elementary level engage in historical inquiry. Your responses will provide me with insights into this process. Please feel comfortable to share anything you wish to share as answers to these questions, as your candid feedback will be very helpful for my research and our future professional development planning. You may also skip any questions you do not wish to answer.

**Interview Questions:**

| **BACKGROUND – *I'd like to start by asking a few questions about your professional background and your general thoughts about teaching history.*** | |
|---|---|
| **1. To get things started, could you tell me about your history of teaching here at [Bradford Public Schools] and your school in particular?** | ***How much of this has been 5$^{th}$ grade and/or history*** |

| | |
|---|---|
| **2. How long have you been teaching 5th grade?** | ***How much of this has been history*** |
| **3. Can you tell me about your educational background and any preparation programs you completed prior to teaching?** | ***History courses/degrees***<br>***Undergraduate major/courses***<br>***Graduate programs*** |
| **4. What do you believe is the purpose of history education?** | ***Constructivism***<br>***Civic purposes***<br>***Other viewpoints*** |
| **5. Generally speaking, what would an ideal history lesson look like to you?** | ***Inquiry questions***<br>***Source work***<br>***Student tasks***<br>***Assessment*** |
| **PLANNING/LESSON DESIGN – *I'd like to ask you a few questions about how you approach planning for history units and lessons.*** | |
| **6. Can you describe for me how you typically go about planning for lessons in your history classes?** | ***District documents***<br>***Utilization of documents***<br>***Backward design*** |
| **7. What [other] resources do you use when you plan your history lessons and units?** | ***Web resources***<br>***Textbook***<br>***Other resources***<br>***Adaptations/modifications*** |
| **PROFESSIONAL LEARNING – *I'd like to ask you a few questions about professional development and collaboration with colleagues.*** | |
| **8. Can you tell me about any professional learning that you've engaged in about history or social studies?** | ***Structure/frequency***<br>***Perceived effectiveness***<br>***PD not provided but desired*** |
| **9. Can you tell me about how you collaborate, formally or informally, with your colleagues for history and social studies?** | ***Formal***<br>***Informal***<br>***Nature of collaboration*** |
| **CLOSING** | |
| **10. Is there anything I missed or anything you'd like to add about planning for and teaching history in your classroom?** | |

**Closing:**
Thank you again for your participation in this interview process. If you have any follow up comments that you'd like to share with me, please don't hesitate to reach out. Additionally, if you have any concerns that arise about this interview, please also feel free to contact me and we can discuss your concerns. I may also reach out to you with some brief follow up questions to clarify as needed or to confirm with you whether I've correctly interpreted your responses. This have been a very valuable experience!

## Follow-Up Interview Protocol

*(Stated on the audio recording)*

**Date:**

**Time:**

**Participant:**

**Location:**

**Research Questions:**

**RQ1. In what ways, if any, does participation in curriculum-based professional development foster teacher uptake of historical inquiry, particularly:**

c) **Educative curriculum elements**
d) **Modeling and rehearsals of practices within PD**

**RQ2. To what extent, if any, do teachers engage in elements of historical inquiry in the classroom?**

**Introduction:**
I want to begin by thanking you for agreeing to meet with me and engage in this interview about how things have gone with the PD and inquiry unit. Your participation is completely voluntary, and you may decline to participate at any time. Also, I would like to record the audio of this interview to ensure accuracy and review your responses at a later date. This audio will be stored securely and will not be made public. After this interview is transcribed, I will destroy all copies of the audio. *Is it OK with you if I record? Do you have any other questions or concerns about the purpose of this interview or the interview process at this time?*

As you know, I am interested in understanding how elementary level educators engage in historical inquiry. Your responses will provide me with insights into this process. Please feel comfortable to share anything you wish to share as answers to these questions, as your candid feedback will be very helpful for my research and our future professional development planning. You may also skip any questions you do not wish to answer.

**Interview Questions:**

| | |
|---|---|
| **LESSON DEBRIEF –** ***I'd like to start by asking a few questions the inquiry unit and the lesson I just observed.*** | |
| **11. Tell me a bit about how you thought the inquiry unit went in your classroom?** | ***General impressions***<br>***Student tasks***<br>***Summative assessment***<br>***General student participation***<br><br>***Probe for:***<br>***WENT WELL***<br>***CHALLENGING*** |
| ***12. Question specific to the observation*** | |
| **PROFESSIONAL DEVELOPMENT –** ***I'd like to ask a few questions about the professional development session we did to prepare for this unit.*** | |
| **13. Thinking about the professional development we did to prepare for this unit, what aspects of that session were most helpful for implementing the unit?** | ***Decompositions***<br>***Modeling***<br>***Rehearsals***<br>***Other aspects*** |
| **14. In what ways, if any, would you change the professional development session in the future?** | |
| **EDUCATIVE CURRICULUM –** ***I'd like to ask you a few questions about the inquiry unit materials and lesson plans.*** | |
| **15. Thinking about the unit materials themselves, what did you find to be most helpful to you when using them in the classroom? Most challenging?** | ***Content supports***<br>***Teaching points***<br>***Scaffolds***<br>***Other elements*** |
| **16. In what ways, if any, would you modify the unit plan for future use?** | |
| **17. How do you feel this unit compares with units or resources you've used to teach history in the past?** | |

| | |
|---|---|
| **18. Is there anything else you'd like to tell me about the professional development and/or unit plan that we haven't discussed?** | |

**Closing:**
Thank you again for your participation in this interview process. If you have any follow up comments that you'd like to share with me, please don't hesitate to reach out. Additionally, if you have any concerns that arise about this interview, please also feel free to contact me and we can discuss your concerns. I may also reach out to you with some brief follow up questions to clarify as needed or to confirm with you whether I've correctly interpreted your responses. This have been a very valuable experience!

## Appendix C: Observation Protocol

| **Teacher:** | **Date:** | **Class:** |
|---|---|---|
| **Period:** | **Students:** | **Lesson Topic:** |

**Research Questions:**

**RQ1.** In what ways, if any, does participation in curriculum-based professional development foster teacher uptake of historical inquiry, particularly:

a) Educative curriculum elements
b) Modeling and rehearsals of practices within PD

**RQ2**. To what extent, if any, do teachers engage in elements of historical inquiry in the classroom?

**Classroom Sketch:**

**Look-Fors:**

- Practice Standards/Historical Inquiry in action:
  - Asking questions/conducting inquiries [PS2]
  - Gathering information from multiple primary/secondary sources [PS3]
  - Analyze sources for purpose/POV/fact or opinion [PS4]
  - Evaluate credibility/accuracy/relevance of sources [PS5]
  - Argue or explain information using evidence [PS6]
- Uptake related to educative elements:
  - Suggested modifications
  - Suggested teacher language
  - Big ideas of content
- Uptake of decomposed/rehearsed practices

**Running Notes**

| **Time** | **Observation Notes [Observer Notes in Brackets]** |
|---|---|
| | |
| **Observation Reflections:** | |

## Appendix D: Educative Curriculum Unit

| How did colonization change early America? | |
|---|---|
| **Curriculum Standards** | 5.T1.1. Explain the early relationships of English settlers to Native Peoples in the 1600s and 1700s, including the impact of diseases introduced by Europeans in severely reducing Native populations, the differing views on land ownership or use, property rights, and the conflicts between the two groups (e.g., the Pequot and King Philip's Wars in New England). |
| **Staging the Compelling Question** | Students will engage in a sensemaking activity where they will activate prior knowledge about the Wampanoag people and the Pilgrims from the Grade 3 curriculum as a launching point to studying how the relationship between the two changed over time. |

| Supporting Question 1 | Supporting Question 2 | Supporting Question 3 |
|---|---|---|
| What was the relationship between the Pilgrims and Wampanoag like in 1621? | How did the relationship between the colonists and Native Peoples of Massachusetts change over time? | What was King Philip's War, and how did it impact the Native Peoples of Massachusetts? |
| **Formative Task** | **Formative Task** | **Formative Task** |
| Students will analyze primary sources about the First Thanksgiving and the relationship between the Wampanoag and Pilgrims to make an evidence-based claim. | Students will analyze primary and secondary sources and explain how the relationship between the colonists and Wampanoag changed over time. | Students will analyze secondary sources and make an evidence-based claim about how King Philip's War impacted the Native Peoples of Massachusetts. |
| **Featured Sources** | **Featured Sources** | **Featured Sources** |
| **Source A:** Excerpt from *Mourt's Relation*<br>**Source B:** Treaty between the Wampanoag & Pilgrims (1621)<br>**Source C:** "The First Thanksgiving, 1621" by Karen Rinaldo | **Source A:** Two Maps of Southeastern Massachusetts<br>**Source C:** John Easton's Account | **Source A:** Summary of King Philip's War<br>**Source B:** Map of Praying Towns in Massachusetts |

| | |
|---|---|
| **Summative Performance Task** | **ARGUMENT: Using evidence from the formative tasks, students will engage in a structured discussion task about the compelling question and complete an individual reflection piece.** |

## Inquiry Overview

In this inquiry, students will build on their prior knowledge regarding the arrival of the Pilgrims to examine how the relationship between English settlers and the Native Peoples of the area now called New England changed over time. Students will also analyze the impact that colonial settlement had on the Native Peoples of the area.

## Staging the Compelling Question

| | |
|---|---|
| **Identifying Big Ideas** | **Consider the "traditional narrative" of the Pilgrims – is it the whole story? In history, we want our students to draw conclusions using evidence from sources. By helping students establish a common knowledge base of the arrival of the Pilgrims, students can work together to construct a deeper and more critical understanding of how this event impacted those involved over time.** |

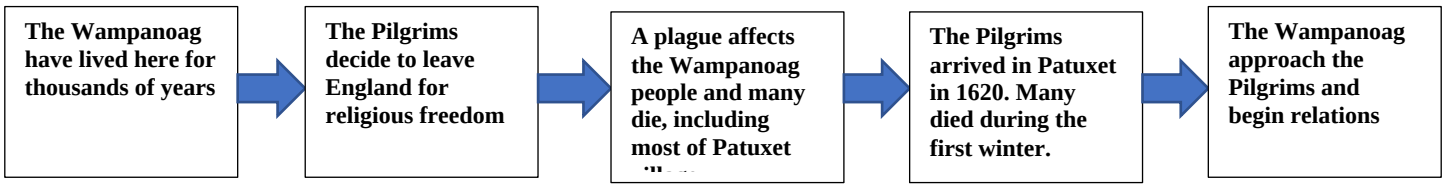
To stage the compelling question, students will engage in a brief review activity to recall information about the arrival of the Pilgrims and the early interactions between the Pilgrims and the Wampanoag in 1620-1621. To begin, have students respond in writing to the following prompt: *What do you remember about the Wampanoag and the Pilgrims from other social studies classes?*

Students should provide as much detail as possible in their own writing before sharing out as a class. Remember, this is to jog memory, so students shouldn't spend too long on this prompt.

| | |
|---|---|
| **Anticipating Student Responses** | **Students will have learned about the Pilgrims and Wampanoag in a few ways before Grade 5:**<br>• Thanksgiving and Indigenous Peoples Day in Kindergarten<br>• The history of the Wampanoag in Grade 3<br>• The arrival of the Pilgrims and First Thanksgiving in Grade 3<br>***What responses do you anticipate students will provide in their responses?*** |

After having students reflect individually in writing, facilitate a whole-group share-out (you could also go with a think-*pair*-share if your students may benefit from some rehearsal of responding with a peer) and capture relevant pieces of information on the board.

After students have generated enough prior knowledge, instruct the to complete the basic sequence chart (Handout A) leading to the interaction between the Pilgrims and Wampanoag with something like the following elements:




This is a simplified sequence and students may recall other aspects (e.g., the Pilgrims lived in the Netherlands before coming to America, Squanto and Samoset knew English, etc.,) which you can encourage some discussion around. Ultimately, this sequence helps students engage in the Task #1 as it sets the conditions for examining relations between the Wampanoag and Pilgrims in 1621.

***Transition Point:*** After completing the staging activity, explain to students that we will be investigating the relationship between the Wampanoag and the Pilgrims and other settlers over time. Introduce the compelling question: *How did colonization change early America?* and explain to students that we are going to investigate this question along the way. Keep the question posted in the classroom throughout the inquiry so students can check back in with it.

| | |
|---|---|
|  Student-friendly Definitions | **Students will likely need a breakdown of the term *colonization*. A student-friendly definition of the term could be: *"Taking over another a place that is not your own and settling or staying there."* Students should know that a colony is a place that is settled or taken over, and colonizers are the people to settle or take it.** |

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## Task #1:
## *What was the Relationship Between the Pilgrims and the Wampanoag like in 1621?*

| | |
|---|---|
|  **Identifying Big Ideas** | **To help students understand how the relationship between the settlers and Native Peoples changed over time, students need to get a "baseline" of the relationship from where they left off in this history. For this task, students will evaluate the relationship between the Pilgrims and Wampanoag in 1621. It is important for students to understand that this was a relationship of *mutual assistance* – the Pilgrims needed the help of the Wampanoag for survival (half of their population was gone after the winter of 1620-1621), while the Wampanoag needed assistance with the looming threat from stronger rivals in the area.** |

In this task, students will examine primary sources to evaluate the relationship between the Pilgrims and the Wampanoag in 1621. To begin, introduce students to the supporting question for the task (also at the top of Handout B) and inform students that our goal for this task is to find evidence from primary source documents to answer the question.

| | |
|---|---|
|  **Connections to Practices** | **Both the activator and the main task involve students in *historical thinking.* Historical thinking involves utilizing critical thinking to process information about the past.[3] When engaging in historical thinking, students must analyze and evaluate sources to contextualize, corroborate, and read closely to draw conclusions about the past. In the activator, we will guide students through a modeling of the sourcing aspect of historical thinking by showing them how *when* a source was created and by *whom* can affect what the source tells us – or doesn't – about the past. Students will then apply this practice on their own with the primary source set within the task itself.** |

Activator: To begin the activity, show the students Slide 1 in the slide deck, which features a painting of The First Thanksgiving At Plymouth by Jennie Augusta Brownscombe in 1914. Begin the analysis of the source by asking students to note what they see in the painting.

[3] Trombino, D.L., Bol, L. (2012). Historical Thinking. In: Seel, N.M. (eds) Encyclopedia of the Sciences of Learning. Springer, Boston, MA. https://doi.org/10.1007/978-1-4419-1428-6_1074

| | |
|---|---|
|  Anticipating Student Responses | **Students will likely make observations of what they see in the painting, but also probably make inferences or draw conclusions as well. Encourage students to first note what they see – direct observations – before then making inferences or drawing conclusions.**<br>***What aspects of the painting do you think students will note/observe? What inferences will they draw about the painting?*** |

**After giving students time to engage in a brief visual observation of the document, begin modeling the process of *sourcing* the document (use the first-person as you model):**

- Note to students that when historians examine a source, the first thing they try to do is know what they are looking at. This is called *sourcing*.
- Explain to students that a good place to start when looking at a source is any description or information about the source itself, often called the citation. Here, I see that this painting was created by someone named Jennie Augusta Brownscombe. I don't know who that is, but I'm going to circle that name for now. Then I also see that the title of the painting is The First Thanksgiving at Plymouth. I'm going to make a note here that this scene is the first Thanksgiving between the Pilgrims and the Wampanoag [make the note next to the title].
- The next thing I see is the year that the portrait was made. It says 1914. I'm going to underline that.
- Wow, I am just noticing that the year of the painting and the year of the subject are very far apart. [You can do the math on the board or have students do the math] That's a difference of 293 years! Do we think the author was alive during the first Thanksgiving? So that makes me wonder if this source is an accurate portrayal of the event. I'm going to put the word *reliable* with a question mark next to it.

After modeling the sourcing of the painting, explain to students that they will be evaluating more sources about the first Thanksgiving and the relationship between the Pilgrims and the Wampanoag in 1621, and that they, too, will be thinking like historians and sourcing documents.

***Transition Point:*** After completing the activator, explain to students that they will be looking at two primary sources – which are documents from the time period – about the Pilgrims and the Wampanoag to see if we can answer the supporting question.

**Document Analysis**

Provide students with Handout B, which contains the two documents and text-dependent questions. Start by reminding students of the supporting question, which is anchored at the top of the handout. Let students know that they will be evaluating these primary source documents to come up with an answer to that question.

| | |
|---|---|
|  Student-friendly Definitions | **Students may not quite remember the difference between source types. Students should be reminded that a primary source document is a document that is from the time period being studied. It can be a visual source like a painting or photograph, or it can be a print source like a journal, book, or newspaper article.** |

Next, teachers can take one of two approaches: students could be allowed to take on the document themselves in small groups/pairs, or the teacher could use a gradual release model and facilitate the sourcing questions similar to the modeling that just took place, but with greater student input. Either way, teachers will want to have students finish the sourcing component first and review student progress before moving on.

| | |
|---|---|
|  **Anticipating Student Responses** | **Students are being asked to make a judgment claim about whether the document is from a reliable source.**<br>***What reasons for/against this being a reliable source do you think students will offer?***<br>**On the one hand, this was written by a Pilgrim not long after the event took place. On the other hand, it is one man's account – and it is not from the Wampanoag perspective – so that might limit the reliability. It's good for students to understand that no source is 100% reliable, and that historians have to balance these sides when reading a source.** |

Students should then evaluate the source using the remaining guiding questions. The close reading questions require students to find facts from the text about the event and to annotate them where they appear. As is the case with non-fiction text strategies in ELA, students should preview the close reading questions before tackling the text. Teachers may want to model this close reading work as well (again, in the first-person):

- Let students know that historians read sources very closely to understand what the source is trying to say and how it can help us understand history.
- Remind students that when we look at a non-fiction text, we should review the questions first. I'm noticing that I need to annotate some things along the way: I need to circle parts about a celebration…so I'm going to make that note here in the margin. Then I need to underline parts about what the Wampanoag did, so I'll note that here, too. Ok, time to read the document…
- [Read through the document aloud, completing the annotations as you go, and then answering the questions aloud]

After completing the close reading, there are two reasoning questions to stretch student thinking. The first one provides students with an opportunity to *corroborate* this source with the portrait in the activator. Teachers will want to provide students with a chance to flesh out what they notice across the two sources.

| | |
|---|---|
|  **Connections to Practices** | Corroboration is part of historical thinking whereby students examine multiple sources to compare/contrast across the documents. In this case, students are going to see that the description of the First Thanksgiving by Winslow – though brief – tells of a much more collegial and balanced interplay between the Wampanoag and the Pilgrims than the portrait suggests with the Wampanoag isolated and in the background. Though not totally essential for answering the supporting question, this provides students with a chance to flex their thinking around how sources can work together to help us understand the past. |

In addition to the contrasting representations of how the Pilgrims and Wampanoag interacted, the teacher can also let students know that other features of the portrait are historically inaccurate: the head dresses and clothing are not similar to how the Wampanoag dressed, and there were no

log cabins in 1621 Plymouth. This is an opportunity for students to see that by examining a primary source closer to the event itself, we are able to evaluate how accurate the portrait is. Additionally, it is worth noting to students (or having students make the connection) that this event is not called "Thanksgiving" in the primary sources, and this name was given to it long after it took place.

Students should then answer the second reasoning question, which calls on students to tie what they learned in this document back to the supporting question.

After completing the excerpt from *Mourt's Relation*, teachers should then direct students to the second document, which is a treaty between the Pilgrims and Wampanoag according to William Bradford, the governor of Plymouth. Here, teachers can encourage students to engage in the same modeled strategies for corroboration and close reading from the first source more independently in small groups, or you can graduate the release similar to the first document.

| | |
|---|---|
|  **Anticipating Student Responses** | **In this second document, students may note that while Bradford was a close actor to this treaty, his record of the event wasn't published until 1651.**<br>***What will students think about this difference of nearly 30 years? How will you respond?*** |

Once students have completed the second document, teachers should review the corroboration and close reading to ensure that all students were able to successfully source and annotate the document. Students will likely reason that the treaty shows mutual respect and rules between the Pilgrims and Wampanoag, which will lend itself to a positive answer to the supporting question.

| | |
|---|---|
|  **Identifying Big Ideas** | **Before wrapping up the lesson, teachers should briefly ask students if any of the sources they've looked at contain the Wampanoag perspective on these events. They will realize that all these sources are from the settler perspective. As such, it is important to note to students that good historians also ask whose voice is missing and, when possible, seek those voices out. In this case, there are no written sources from the Wampanoag, but the native perspective has been passed down orally over time. Teachers may wish to show this brief clip by Wampanoag educator Linda Coombs about the First Thanksgiving to support this notion. (starting at 3:20)** |

After completing both documents, provide students with time to complete the "Putting it all Together" section at the end of Handout B. This is a a scaffolded template for addressing the supporting question. After facilitating a think-pair-share of the responses, teachers should lead the development of a consensus statement to the question that the class can reference throughout the inquiry (put this on an anchor chart just below the supporting question). Teachers should collect individual student responses to check for understanding and look for any common misconceptions or struggles from the lesson.

## Task #2:

***How did the relationship between the colonists and Native Peoples of Massachusetts change over time?***

| | |
|---|---|
| **Identifying Big Ideas** | **This task focuses students on the change over time in relations between the settlers and the Native Peoples. The supporting question uses that term instead of Wampanoag since the increasing presence of European settlers affected all the Native Peoples of the place now called Massachusetts. Here, students will use visual sources to understand the geographic expansion of settler-colonialism at the expense of the Native Peoples, and they will also analyze a primary source for a qualitive understanding of the rising tensions. Overall, this task works in contrast with the conclusions drawn in the previous task.** |

In this task, students will examine two maps and a primary text source to assess the change in relationship between the colonists and the Native Peoples over time. If you are starting Task #2 in a separate lesson, begin with the activator below:

Activator: Since students will be building on their knowledge from the prior lesson, have students begin by engaging in a think-pair-share protocol assessing what they believed to be the status of the relationship between the Pilgrims and Wampanoag in 1621. Students can use their claims from the previous task to guide the conversation.

***Transition Point:*** *After completing the activator, explain to students that, as more settlers came to the place now called Massachusetts over time, the relationship changed between the settlers and the Native Peoples. Good historians look for patterns in history, and today we are going to see if we can find change over time. Then direct students to the supporting question for the task.*

### Map Analysis

Provide students with Handout C, which contains two maps. The first map is a map of the place now called Massachusetts with the location of various Wampanoag communities (Slide 2). The second map is of the settlements established by European settlers between 1620 and 1691 (Slide 3).

| | |
|---|---|
| **Connections to Practices** | **The MA HSS Practice Standards require students to organize information from multiple sources. Here, students are looking at two maps of the same region, but 70 years apart. The goal is for students to orient to the idea that the absolute location (southeastern Massachusetts) doesn't change, but the names of the places – and thus, who controls the land – do change. Support this work by ensuring that students use good map skills: look at the title of the maps, examine the map features and key, etc.** |

Here, teachers can decide to what extent they wish to have students work independently to analyze the maps. Regardless of the level of autonomy, teachers should address the following in any format:

- Remind students that when we examine maps, it's always good to look at the title to help us know what the map is telling us about the place. Here, the first map is of Wampanoag territory in 1620 (the year the Pilgrims arrived).
- Next, direct students to the map key/legend, and remind them that this is the next place to go when looking at a map. Note with students that the key tells us that underlined places

are Wampanoag communities, and that the shaded area is where the Wampanoag people lived. We also see from the insert that this is southeastern Massachusetts, though students might discern that from seeing Plymouth or noticing Cape Cod.

After making sure that students are effectively reading the map, have students complete the questions aligned with the map. The goal here is for students to orient well enough to the map that they can make comparisons across this map to the next one.

Students should then analyze the second map. Again, teachers will want to help students orient to the map by looking at the title (there is no key/legend on this one). The questions that go along with this map direct students to find a location that is similar on both maps – likely Plymouth – and then take note of locations that are the same on both maps but have new English names and settlement dates. The main idea here is that students should understand that Wampanoag villages were taken over by English settlers over the course of the 70 years after the arrival of the Pilgrims.

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|  **Anticipating Student Responses** | **Maps can be tricky for students, no less comparing across two maps. Though the map-dependent questions are heavily scaffolded, students will notice different features on each of the two maps**<br>***What features do you think your students will be drawn to on each map? How can you leverage these noticings to bring students around to the main idea?*** |

**Document Analysis**

After analyzing the maps, inform students that we will be returning to a primary source to look at what people were saying about the relationship between the Native Peoples and the settlers during the changes noted on the map. Direct students to the source and teachers can either lead students in completing the sourcing portion or simply remind them about sourcing from the first task and let students attempt it in pairs/small groups. Teachers should then have students complete the close reading and reasoning questions.

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|  **Identifying Big Ideas** | **When taken together with the information from the maps, students should see that the encroachment of the settlers over time was leading to conflict over issues such as land rights, fairness in solving disputes, etc. When working with students on these sources, consider asking questions that keep them focused on change over time and the correlation between an increased presence of settlers and the adverse impact on the Native Peoples' way of life – one that was unaffected by settlers for thousands of years before their arrival.** |

After analyzing John Easton's account, have students complete the Putting It All Together portion of Handout C. Just as with Task #1, have students engage in a think-pair-share of their assessments and develop a consensus statement that can be posted in the room to track student learning/thinking across the inquiry.

## Task #3:
### *What was King Philip's War, and how did it impact the Native Peoples of Massachusetts?*

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|  **Identifying Big Ideas** | **This final task asks students to consider the consequences of the changes over time in Task #2. Here, students will examine a secondary source description of King Philip's War to assess the cause and effect of increased settlement by the English. Students should note that the war was not without reason, and teachers should help students see that King Philip's War was in many ways a culmination of pressure put on the Native Peoples as settlers continued to expand and take territory in the place now called Massachusetts.** |

In this final task, students will learn about King Philip's War (1675-1678) and take note of the impact that the increased settlement had on Native Peoples. This will prepare students to begin to make summative claims about the compelling question.

Activator: Since students will be building on their knowledge from the prior lesson, have students begin by engaging in a think-pair-share protocol assessing how the relationship between the settlers and the Native Peoples changed over time. Students can use their claims from the previous task to guide the conversation.

Source Analysis: Provide students with Handout D, which contains a secondary source summary of King Philip's War. Remind students of the supporting question for this task and let students know that this is a secondary source explanation of a war that broke out after the relationship between the settlers and Native Peoples got too bad.

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|  **Student-friendly Definitions** | **Students may not quite remember the difference between source types. Students should be reminded that a secondary source document is a document that is *about* history, but not from the time period (i.e., written after the fact). These are often from people who have studied the history and are telling us what they learned about it or how they feel about it.** |

The source has two straightforward close reading questions: how did the war affect the natives and the settlers, and who "won" the war? Students may not understand why "won" is in quotations – denoting that there was nothing glorious about winning a terrible war. Teachers should clarify this for students or change the question based on your learners and how they will understand this point.

After completing the close reading questions, students should answer the reasoning question tying it back to the supporting question. Since there is only one secondary source for this task, teachers should facilitate a share-out and consensus statement writing similar to the two previous tasks using the answers to this reasoning question.

## Summative Performance Task

***How did colonization change early America?***

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|  **Connections to Practices** | **The MA HSS Practice Standards require students to use evidence from multiple sources to explain or argue using valid reasoning. Here, students will use evidence gathered from a variety of sources across multiple tasks to develop an evidence-based response to the compelling question. This is no easy task! We call this "sustained inquiry" since students are working across multiple classes and tasks to answer one big question. Students may not be used to doing this type of sustained inquiry in social studies, so the more scaffolding we can provide, the better.** |

After collecting evidence from across the three tasks, students must now develop and articulate an evidence-based argument for how colonization changed early America. Teachers have lots of flexibility here around performance task format and structure. The goal is to elicit evidence-based reasoning, so there is no one specific task or assessment prescribed in this inquiry. Below are considerations and "look fors" as teacher develop a task that is responsive to the profiles of learners within their classrooms.

**Argument Stems:** Students have just completed a structured inquiry, meaning that the question has been posed to them (versus developed by them) and while there are different ways students can respond, we can anticipate a few directions for their arguments:

- Colonization negatively affected the Native Peoples
- Colonization benefited the settlers
- Colonization made the relationship between the settlers and the Native Peoples worse

These are all claims we can expect from the evidence and tasks in this inquiry.

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|  **Anticipating Student Responses** | **While there are many different ways that students can address the compelling question, the anticipated argument "stems" above are the ones most likely to emerge from the inquiry. Each of these argument stems can be mapped back to evidence from the sources in some way.**<br><br>***What claims do you think your students will gravitate toward and what evidence will they use? Which ones might be less appealing or obvious to students? How can we help students develop those claims?*** |

**Task Format:** There are a variety of ways that teachers can assess student learning for this inquiry. One way could be to engage students in an accountable talk protocol where accountable talk supports are provided to students to engage in small-group discussions. Individual student thinking could be recorded via a final FlipGrid post, etc. Teachers could also challenge students to produce visual representations such as infographics.

**Assessing Student Understanding:** Regardless of task format, teachers should look for the following criteria in assessing student learning:

- *Did students make claims that directly address the compelling question?*
- *Were claims supported by evidence from the sources and tasks?*
- *Were students able to show reasoning as to how the evidence supports the claim?*

## Appendix E: Codebook

**Code Categories:**
Contextual
Practices
Professional Development/Educative Curriculum Materials

### *A Priori* Codes

| Code Name (Category) | Definition | Inclusionary Criteria | Exclusionary Criteria |
|---|---|---|---|
| **Barriers to implementation (Contextual)** | Any barriers or obstacles identified by the teacher regarding implementing the practice standards/historical inquiry | Data points about identified challenges, resources or support or lack thereof, or frustrations | Data points about challenges or issues that are not related to history |
| **Personal beliefs (Contextual)** | The teacher's personal beliefs, dispositions, or experiences related to historical inquiry and/or HSS Practice Standards. | Data points about educational philosophy, social studies, pedagogy, attitudes/beliefs about policy enactment | Data points about non-curricular beliefs/attitudes, educational issues divorced of teaching & learning |
| **Content knowledge (Practices)** | Teacher's content knowledge for history | Data points about CK or lack of CK for history | Data points about pedagogical knowledge (PK) |
| **Inquiry Questions (Practices)** | Using inquiry to frame learning | Data points about the use of compelling/ supporting/ essential questions | Data points about stated learning goals or objectives not framed as an inquiry question |
| **Sources (Practices)** | Engaging in primary/secondary sources to gather and analyze data | Data points about primary, secondary, or tertiary sources | Data points not related to sources (lecture) |
| **Student tasks (Practices)** | Student tasks requiring use of sources and/or addressing inquiry questions | Data points about student tasks requiring sources and/or inquiry questions | Student tasks that are primarily compliant in nature |
| **Instructional shifts – PD (PD/ECM)** | Any changes in how the teacher approaches the teaching of history related to the PD | Data points related to instruction in history seemingly related to the PD offering | Data points related to instruction outside of history that does not have transferability |
| **Instructional shifts – ECM (PD/ECM)** | Any changes in how the teacher approaches teaching of history related to ECMs | Data points related to instruction in history seemingly related to the ECM elements | Data points related to instruction outside of history that does not have transferability |
| **Approximations (PD/ECM)** | Rehearsing/Modeling of practices through curriculum-based professional development | Data points related to PD elements featuring approximation of practice | Data points related to teaching moves not approximated |
| **Decomposition (PD/ECM)** | Breaking practices down into parts to learn the practice | Data points related to PD elements featuring decomposition | Data points related to teaching moves not decomposed |
| **Educative Features (PD/ECM)** | Curriculum elements that support teacher learning | Data points related to educative features in the curriculum unit | Data points not related to educative features |
| **Modifications (PD/ECM)** | Teachers modifying PD/ECM elements based on classroom context | Data points where teacher seemed to consciously modify PD/ECM element | Data where teacher followed PD/ECM element as approximated |

***Emergent Codes***

| Code Name (Category) | Definition | Inclusionary Criteria | Exclusionary Criteria |
|---|---|---|---|
| **Missed Opportunities (PD/ECM)** | Experiences where the teacher missed an opportunity to enact an aspect of the PD or ECM | Data points where teachers missed or struggled to enact a particular aspect of the practices or ECM | Data points where the teachers fully enacted the PD or ECM |
| **Thinkalouds (Practices)** | The teacher used a thinkaloud protocol to assist students in engaging in the desired practices | Data points about teachers verbalizing the steps of a given practice; verbalizing the rationale behind a way of thinking | Data points procedural directions or communications |
| **Student Tasks - Argumentation (Practices)** | Student tasks requiring use of sources and/or addressing inquiry questions using evidence from text to make an argument | Data points about student tasks requiring sources and/or inquiry questions for arguments | Data points about student tasks requiring sources and/or inquiry questions for formative learning/content knowledge acquisition |
| **Scaffolding - Hard (Practices)** | Engaging in scaffolds intentionally designed into the student materials | Data points about the use of premeditated scaffolds | Data points about the way teachers scaffolded learning on the spot |
| **Scaffolding - Soft (Practices)** | Engaging in scaffolding on the spot and/or in response to student learning | Data points about the way teachers scaffolded learning on the spot | Data points about the use of premeditated scaffolds |
| **Cross-curricular Connections (Practices)** | Drawing from or using practices from other disciplines | Data points about ELA or science practices | Data points about historical inquiry practices |