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E: admin@hej-hermes.net

W: www.hej-hermes.net

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Deconstructing Karlsson, Part 1: Historical Consciousness

Robert Thorp

Stockholm University, Sweden

ABSTRACT: This paper presents an analysis of how leading Swedish historian and history didactical researcher Klas-Göran Karlsson presents the concept of historical consciousness in some of his most recent publications and seeks to analytically deconstruct his view of the concept. The study finds that Karlsson presents definitions of the concept that may not be compatible to each other. Using this result, the paper then tries to present and argue a view of the concept that harmonises with the one presented by Karlsson.

KEYWORDS: Klas-Göran Karlsson; historical consciousness; deconstruction; history didactics.

Introduction

Swedish professor of history Klas-Göran Karlsson is undoubtedly one of the most prominent figures in Swedish history didactics. During the last three decades he has published extensively on key topics in history didactics both in Sweden and abroad. If one works within the academic field of history didactics in Sweden, it is impossible not to pay attention to Karlsson's research. During a history didactical conference held at Karlstad University in 2015 Klas-Göran Karlsson expressed concerns about the present state of history didactical research in Sweden. One of the more acute problems, according to him, was that recent research did not engage itself theoretically to a satisfying degree. In Karlsson's view, researchers adopted the work of others and himself uncritically, instead of "pulverising Karlsson, or at least deconstructing him to create something of their own" (Ludvigsson et al., 2016, p. 22). This has resulted in research that lacks perspective and uncritically confirms positions previously held in research (Ludvigsson et al., 2016, p. 22). This paper should be seen as an attempt to reply to Karlsson's call by way of deconstructing what four of his more recent publications (Karlsson, 2009, 2010, 2011, 2014) state regarding what should be seen as the most central history didactical concept in a Swedish context: historical consciousness (cf. Schüllerqvist, 2006, pp. 136–140). This concept is also generally perceived as a problematic one due to its vagueness, thus making critical theoretical inquiries into the concept relevant also at a more general level both in a Swedish and international context (cf. Duquette, 2011, p. 259; Körber, 2016, pp. 443–447; Seixas, 2016, pp. 428–430).

The paper will present an analysis of how Klas-Göran Karlsson presents historical consciousness that has been directed by four questions: (i) what is historical consciousness? (ii) how does historical consciousness affect our understanding of history and the world around us (i.e. how is it applied)? (iii) how does historical consciousness function? and (iv) how is historical consciousness operationalised? These questions were chosen in order to

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cover what can be perceived to be crucial theoretical aspects regarding the concept (cf. Thorp, 2013, pp. 221–222). A rather straightforward methodology has been applied to carry out this study. Four texts recently published by Klas-Göran Karlsson that have longer sections devoted to historical consciousness were chosen in order to allow in-depth analyses of Karlsson's view of the concept in texts that hopefully represent his latest positions regarding the concept. The presentation of the results of these analyses will be divided into three sections: the first section will deal with how the concept is defined, how it is applied, how it functions, and how it is operationalised in the studied texts. The second section ('Deconstruction') will discuss these results and the third section ('Reconstruction') will suggest a possible approach to the concept. This will be followed by a brief conclusion both highlighting the most important results of the present study and suggesting how to move forward.

Historical consciousness according to Karlsson

Definition

Klas-Göran Karlsson presents five views of historical consciousness in the studied texts that could serve as a basis for stipulating a definition of the concept. A first view of historical consciousness that is offered in all of the analysed texts is one that regards the concept as a temporal processor or compass that enables us to orientate in time (Karlsson, 2009, p. 49, 2010, p. 53, 2011, p. 37, 2014, p. 58). With this view historical consciousness becomes an entity that helps us orient in time and create meaning in life. This is done by relating us to temporal relationships or dimensions that are longer than our own lifespans (Karlsson, 2014, p. 58). The second view of the concept that is offered is one that Klas-Göran Karlsson ascribes to German historian and history didactical researcher Karl-Ernst Jeismann: historical consciousness is the relationship between our interpretation of the past, understanding of the present and perspectives on the future (Karlsson, 2009, p. 48, 2010, p. 56, 2014, p. 58). Thus, historical consciousness is not a processor or a compass but rather the relationship between how we perceive and approach what is past, present, and future. A third view offered by Karlsson is historical consciousness as present knowledge that human kind and all our social institutions and forms of social interaction exist in time, and thus have a past, a present and a future (Karlsson, 2009, p. 49, 2010, p. 53). This turns the concept into a kind of knowledge of historicity: historical consciousness is the knowledge that everything is historical and exists in time. A fourth view provided by Karlsson equates historical consciousness with the presence of the past, the present and the future (Karlsson, 2014, pp. 57, 58–59). Here historical consciousness becomes a presence of all temporal dimensions. The fifth view of historical consciousness that can be found in Karlsson's texts defines it as all mental operations that create historical meaning (Karlsson, 2010, p. 55). Historical consciousness is what we use to create meaning in history or from a historical perspective.

Application

A first application of historical consciousness offered by Klas-Göran Karlsson is one that helps us understand that we are both created by history and creators of history (Karlsson, 2009, p. 55, 2011, pp. 35–36). Through our historical consciousness we gain an insight that we are part of social and cultural communities with historical dimensions and that we have a role to play in these communities. A second application applies historical consciousness to enable us to situate ourselves in an extended temporal flow that gives meaning to our lives (Karlsson, 2010, p. 53, 2011, p. 34, 2014, p. 59). We are able to understand that we are part of

a dimension of time that extends our present experiences and lifespans, thanks to our historical consciousness. Karlsson furthermore regards historical consciousness as the basis of orientation, sense-making, and identity construction (Karlsson, 2009, p. 48, 2011, p. 38, 2014, p. 57) and this is the third application found in the studied texts. Here historical consciousness is not merely applied as that which enables us to situate ourselves in an extended temporal flow, but also as that which helps us make sense of things and construct our identities. A fourth application provided by Karlsson is that historical consciousness relates to how the three tense forms affect and interact with each other to provide an understanding of how historical change happens (Karlsson, 2009, pp. 50–51). The final application (inspired by John Lukacs) applies historical consciousness as an insight about the incompleteness of history (Karlsson, 2014, p. 60), i.e. through our historical consciousness we are given an understanding of how history is always someone's history and thus contingent on this fact.

Function

The third aspect I analysed was what functions of historical consciousness that are presented in the studied texts. In other words, how does Klas-Göran Karlsson represent the functions and uses of historical consciousness to us? A first function of the concept he presents is a heuristic one (Karlsson, 2010, p. 54, 2011, p. 39, 2014, p. 58). Here historical consciousness functions as a heuristic tool that enables us to uncover new aspects of history, apply different perspectives and ask different questions to it. Another way historical consciousness functions is to provide us with agency: through making us aware of the fact that we are both created by and creators of history, it functions as a kind of instigator or catalyst for agency. A third function of historical consciousness is that of providing us with an ability to articulate ourselves to give a meaningful temporal direction in time (Karlsson, 2009, p. 53, 2014, p. 60). With this view, historical consciousness functions as a way of making us articulate historical narratives. Another function stipulated by Karlsson is that historical consciousness functions as a means of confirming and justifying our present knowledge and social relationships (Karlsson, 2010, p. 56), i.e. through our historical consciousness we are given means to argue for and justify why the knowledge we have and relationships we adhere to have come to be the way they are. It could also function to normatively argue for contemporary conditions. Finally, historical consciousness can also function as a kind of a language: it provides us with the means to talk comprehensibly about dimensions of time and function as active individuals and citizens (Karlsson, 2009, p. 48).

Operationalisation

The final aspect of how historical consciousness is presented in the works by Klas-Göran Karlsson I have studied is how it is manifested, i.e. what operationalises and sets historical consciousness in motion. The first operationalisation offered by Karlsson is that historical consciousness is activated by borderline events or paradigmatic changes (Karlsson, 2009, pp. 54–55, 2010, p. 58, 2011, p. 36). Examples of such changes can be the fall of communism in Russia or more broadly, the end of the Cold War: these changes prompt people to re-negotiate and re-evaluate their notion of and relationship to history, and this in turn engages their historical consciousnesses. In a similar vein, Karlsson also proposes that historical consciousness is operationalised when history touches our personal lives (Karlsson, 2011, p. 34) or when questions related to our identities are awoken through history (Karlsson, 2009, p. 52). An example of how this works is provided:

The day you realise that your grandfather not only *has* a face much more wrinkled than yours, but also make the reflection that your own face in due time, if you may live and keep your health, *will*

become just as wrinkled as your grandfather's, and – mind-bogglingly enough – your grandfather's face once *was* just as smooth as yours, you have without a doubt activated your historical consciousness by widening and deepening your understanding of time in a contemporary observation or situation. You have received a multidimensional reflection of yourself and you have become more self-reflective. (Karlsson, 2014, pp. 62–63)

Through an understanding of how time and history transcends your individual life span, you have activated your historical consciousness in an understanding of time that connects past, present and future perspectives. Karlsson furthermore claims that historical consciousness is activated when basic dimensions and values in human life are touched upon by history (Karlsson, 2010, p. 57, 2014, pp. 64–65). Such basic dimensions can be matters of life and death and values relating to questions of good versus evil, justice versus injustice, et cetera.

Deconstruction

In the presentation above we have been given what could be called a rather multifaceted but also diverse picture of historical consciousness. This section will analyse the results above and deconstruct the image of historical consciousness presented in the studied texts. The presentation below will follow the same disposition as the sections above, i.e. I will start with the concept's definition and then move on to how it is applied, et cetera.

A first crucial step in theoretically making sense of how a concept works is by looking at its definition: do we have a definition of the concept that can work as a basis for further theoretical inquiries? As shown, Karlsson offers five views of historical consciousness that may work as a basis for stipulating a definition of the concept. The first view presents historical consciousness as a temporal processor or compass that enables people to orientate in time. With this view, historical consciousness can be regarded as a certain capacity or competency individuals may have that enables them to make a certain sense of time and/or history. This could be perceived as relating to the fifth view of historical consciousness outlined above: that of historical consciousness as all mental operations that create historical meaning. What these views have in common is that they seem to place emphasis on what we use to create meaning: it can be through a temporal processor or compass or through mental operations. One difficulty, however, is that they do not specify what historical consciousness *in itself* may be. Instead we may be able to back-track it through how it creates meaning or helps us orientate in time. The temporal processor or mental operations that do this is historical consciousness. Unfortunately, this does not help us much in understanding what historical consciousness is for two reasons. Firstly, almost anything can be used to create meaning or orientate in time, hence it becomes difficult to say what historical consciousness is using this definition. Secondly, this does not specify *what kind* of processor or mental operations for orientation or meaning making we are dealing with. Surely there are many different ways of orientating or making sense of history, but Klas-Göran Karlsson is not specific about what definition of the concept he is referring to and this makes it hard to say what historical consciousness may be and how to understand its applications, et cetera.

A view presented by Karlsson that does specify a certain kind of meaning making in relation to history is the third one above: historical consciousness as the knowledge that man and all social institutions exist in time and thus have a past, present and a future. This is quite similar to the fourth view that states that historical consciousness is the presence of the past, present and the future, since it could be regarded as similar to a notion of historicity. Here a sense of historicity is equated with historical consciousness, and here we would have a way of specifying what it is. If a person expresses knowledge that we and our social environments exist in time and have a past, present and future, that person would be expressing his or her historical consciousness. This definition does, however, reduce historical consciousness to

something rather commonplace: knowledge or understanding that we exist in time. Furthermore, this definition is not easily made compatible with the views presented above. Even if we disregard the fact that this is a completely different way of defining the concept, we are still left with the question of how knowledge of history relates to meaning making, mental operations or temporal processors that help us orientate in time.

The second view offered by Karlsson, i.e. historical consciousness as the relation between interpretation of the past, understanding of the present and perspectives on the future, is perhaps the most commonly stated definition both in Sweden and abroad (cf. Ahonen, 2005, p. 699). According to this definition historical consciousness is to be found in the relation between how we interpret the past, understand the present, and have perspectives on the future. It is, however, quite difficult to say anything about what this kind of relationship may be. The relationship could be knowledge of historicity as stipulated above, but it could also be a mere mentioning that something extends in time beyond the present. Once again, there is a risk that historical consciousness becomes something rather trivial (e.g. a statement mentioning past, present, and future perspectives on something) and is reduced to a content rather than an ability. This definition also seems to be incompatible with the view of historical consciousness as a temporal processor or mental operation previously stipulated by Karlsson. Karl-Ernst Jeismann, the alleged author of this definition of historical consciousness, also specifically warned against a view of historical consciousness that reduces it to deal with content rather than cognitive abilities (Jeismann, 1997, p. 43). We will return to Jeismann's view of the concept in the following section.

Hence, the views offered by Karlsson include a number of tensions that render a definition of the concept cumbersome. According to the view presented here, it is problematic to claim that historical consciousness is a relationship between interpretation of the past, understanding of the present and perspective on the future, and a mental processor we use to orientate in time, for instance. This does not mean that it is impossible to encompass these aspects of historical consciousness (as I will try to show in the following section), but we cannot easily do it by using multiple and seemingly conflicting views of the concept. This becomes more obvious when we come to apply or operationalise the concept. The applications of the concept that Karlsson stipulates are all focussed on cognitive abilities individuals may have: we use historical consciousness to make sense of things, create meaning in our lives, and to orientate ourselves. To try to make sense of how and why this is the case, we need not only a clear-cut definition to work with but also some kind of theoretical connection between the concept and its application. It is one thing to claim that historical consciousness is a mental processor that we apply to make sense of things, and another to argue why this is the case and show how it may work theoretically. No such definition is offered by Karlsson and neither are any direct suggestions provided as to why historical consciousness does what it is claimed to do.

One example given by Karlsson that may be used to try to make sense of how historical consciousness works is the one presented above where a presumed child's historical consciousness is activated when he or she realises that he or she will grow just as old as his or her grandfather and that his or her grandfather once was just as young as he or she is now. Karlsson claims that the child's historical consciousness has "without a doubt" been activated through this extended temporal understanding, i.e. the child has come to realise that time extends beyond her own personal perspective both into the past and into the future. It is, however, difficult to analyse what this understanding specifically is and how we are to understand what it could mean to the child. Determining what this understanding is depends on what definition of the concept we choose to work with. If we take historical consciousness to be the relationship between past, present and future, we may say that the child's understanding is that there is in fact such a relationship and that this would be tantamount to his or her historical consciousness. We are then left with the question of how we are to

understand what this realisation means to the child: how does this realisation affect her identity construction, meaning making and orientation in time? What happens to the child's cognitive understanding of time apart from the fact that he or she realises that it extends beyond her own horizon? If we take historical consciousness to be a mental process or compass, we are left with the problem of figuring out how this process works: the child reaches an understanding of extended time but how does that affect her temporal processor or compass and, furthermore, how does it relate to her sense of orientation and meaning making? We can certainly assume that an understanding of extended time does all these things to an individual, but we have few reasons to think this to be the case using Karlsson's view of the concept.

I have now touched upon what I perceive to be problematic aspects of how Klas-Göran Karlsson presents historical consciousness in the texts studied. Since we are offered multiple views of historical consciousness in these texts, it is difficult to render a clear-cut definition to work with. This results in difficulties in theoretically connecting the concept with its applications and uses. Furthermore, since these applications are different and not entirely compatible, we cannot use all of the possible definitions stipulated. It has indeed been argued that it may be futile to settle on just one definition of historical consciousness and that it could be beneficial to work with many versions of the concept (cf. Körber, 2015, pp. 6–7). While this may well be the case, we are still presented with difficulties of theoretically making sense of the concept due to the imprecision and vagueness highlighted above. In my view, we need sharp tools in order to perform complicated tasks. This vagueness regarding what the concept should be understood to be results in difficulties in understanding how the concept relates to its applications and functions, and how it is operationalised, particularly since we are not given any arguments as to why this might be the case. I do not take this to mean that the concept should be abandoned, but rather that we should engage with it theoretically to try to deal with the difficulties I have highlighted above. In the next section I will propose an understanding of historical consciousness that I believe manages to evade some of the difficulties we have encountered and theoretically specify how the concept relates to its applications and functions.

Reconstruction

According to my main argument above, the basic difficulty in understanding historical consciousness in Klas-Göran Karlsson's work is that he makes use of various views of the concept that are not identical and compatible with each other. To solve this problem I will propose one particular definition of the concept and try to argue how we could use this definition to build a coherent and comprehensive theory of historical consciousness. Due to reasons of scope and space, this theory will be of a more general kind and all aspects of it could be the object of further theoretical investigation, but I still hope that it may be able to point in the direction we might go with the concept. I am fully aware that this is merely one of many ways of understanding historical consciousness, but it is the one I presently feel is most worth pursuing.

German historian Karl-Ernst Jeismann is by many perceived to be the first to offer a definition of historical consciousness (cf. Eikeland, 1997, pp. 77–79) and he is also generally ascribed the definition of historical consciousness as the relation between interpretation of the past, understanding of the present and perspective on the future, as I have shown above. If we turn to how Jeismann defines the concept in the first edition of the *Handbuch der Geschichtsdidaktik* from 1979, we find that:

By historical consciousness we mean the permanent presence of the awareness that mankind and all social institutions and forms of co-existence created by us exist in time, i.e. they have an origin and a future and represent nothing unchangeably or unconditionally (Schieler, 1974, p. 78f). Besides the mere knowledge of or interest in history a historical consciousness also incorporates the relationship between interpretation of the past, understanding of the present and perspective on the future. Since history cannot be perceived as an image of past realities, but can only be made aware through selection and interpretive reconstruction, historical consciousness is the awareness that the past is present in representations and conceptions. "History is the reconstruction, by and for the living, of dead people's lives. Thus history is born through the contemporary interest that thinking, suffering and acting people have for exploring the past" (Aron, 1961, p. 17). (Jeismann, 1979, p. 42)

This definition is interesting for a number of reasons. We find that Jeismann does not define historical consciousness as the relation between interpretation of the past, understanding of the present, and perspective on the future (that is commonly held to be the actual definition of the concept), but rather as the permanent presence of the awareness that mankind and all social institutions and forms of co-existence created by us exist in time. Further, he sees the relation between past, present and future as one of the constituents of historical consciousness together with an interest in history and knowledge of historical facts.

I find Jeismann's view of the concept to be a plausible one for reasons I will try to give below. To begin with, he specifies not only what historical consciousness is (i.e. awareness of historicity), but we are also given explanations of what this awareness consists of (i.e. knowledge of and interest in history, and a relationship between past, present, and future), and what kind of meaning-making that historical consciousness endows people with: an understanding of history as contextually contingent reconstruction. As I understand Jeismann's view of historical consciousness, an application of temporal dimensions to history will lead to an understanding that history is always constructed in a context by someone for a particular reason. This understanding will in turn lead to an awareness of historicity not only regarding history and representations thereof, but also concerning our own representations and conceptions. Thus, historical consciousness could be regarded as a kind of hermeneutic concept that engages with the totality of the interpretive process (Gadamer, 1975, pp. 47–48; Thorp, 2016, pp. 46–50). Not only is history contextually contingent, but also our own representations and conceptions of it. This, in turn could also be argued to relate to how we come to perceive ourselves and others since we may come to appreciate the contingencies that lay behind our perceptions and thus engage with these both regarding ourselves and others.

If we try to relate this view of historical consciousness to how Klas-Göran Karlsson presents the concept, there may be a way of circumventing the problems highlighted above. The awareness of historicity we have stipulated as a definition of historical consciousness can be regarded as equal to the knowledge of historicity, the temporal processor or compass, and the mental operations presented by Karlsson. Knowledge of historicity leads to an awareness of historicity both regarding history and our conceptions of it, which could in turn be viewed as a mental operation or a temporal processor or compass. The relation between our interpretation of the past, understanding of the present and perspectives on the future, should not be regarded as a definition of historical consciousness but rather as a constituent of it that together with our interest for history and knowledge thereof, works to enable us with an awareness of historicity perceived as an understanding of history as characterised by contextual contingency. This awareness can then in turn be applied to enable us to situate us in an extended temporal flow that give meaning to our lives and allows us to orientate and create meaning and construct our identities according to this contextual contingency. This could also be perceived as functioning as a cause for agency since we are both created by and creators of history, i.e. through our awareness we realise that we cannot escape this fact. It could further be argued to function as a kind of language (i.e. the awareness makes us talk

about history in a certain way) that will help us to articulate histories to give a meaningful temporal direction in time (in the sense that it stresses the contextual contingencies inherent in all approaches to history). This kind of understanding can then be used to confirm and justify our present knowledge and social relationships in a way that conforms to this awareness of contextual contingency, i.e. our knowledge and social relationships are just as contextually contingent as all other kinds of knowledge and social relationships.

Finally, regarding the example Karlsson gives us where a child's historical consciousness is activated through a realisation that his or her grandfather's face once was not wrinkled and that his or her own face once will be, we could maybe claim that what the child has experienced was maybe not an activation of his or her historical consciousness, but an understanding of how temporal perspectives may change our perspective of things, a prerequisite for historical consciousness according to the view presented here.

Concluding remarks

Heeding the call from Swedish professor of history Klas-Göran Karlsson, that Swedish history didactics is in need of more deconstruction, if not pulverisation, of his work, this paper analysed how Karlsson presented historical consciousness in some of his recently published work. The analysis finds that while Karlsson provides us with many reasons why historical consciousness should be perceived to be an important history didactical concept, we are presented with a rather multifarious and in certain aspects problematic view of the concept. According to the argument presented here, we are encountered with difficulties in how to understand the concept and its applications and functions that stem from how Klas-Göran Karlsson defines the concept. To remedy these problems, I suggested a move towards a hermeneutic view of the concept as awareness of historicity that enables us to appreciate and engage with history as contextually contingent reconstruction of past realities, drawing on a re-examination of the definition provided by Jeissmann (1979). I then tried to show how this understanding of the concept may be used as one way of circumventing the problems concerning historical consciousness in the studied texts.

While the argument presented in this paper is limited in many ways, my wish is that it could be regarded as a contribution to the field of history didactics both in Sweden and abroad. A view of historical consciousness as awareness of historicity and contextual contingency may be a way of arguing the concept's importance and relevance in history and history didactics both in Sweden and abroad. Furthermore, this paper also highlights the importance of Karlsson's research, not only regarding how we should understand the field of history didactics and one of its central notions, but also concerning the challenges that lay ahead in future history didactical research.

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About the Author

Robert Thorp is a senior lecturer at Stockholm University, Sweden. His research interests include textbooks, popular history magazines, history teachers' understanding of history, and history didactical theory.

Author Contact: robert.thorp@edu.su.se



Anatomy of a belief: The collective memory of African American Confederate soldiers

Gabriel A. Reich

Virginia Commonwealth University, USA

Amy Corning

University of Michigan, USA

ABSTRACT: This article explores the belief that African Americans fought for the Confederacy as well as the Union during the U.S. Civil War. Collective memory among university students is examined for evidence of the belief, and the narrative elements included are analyzed. Data come from a survey sample of undergraduate and graduate students (N=1,305) at a large public university in a former Confederate state. The survey included an open-ended question asking respondents to describe African American participation in the Civil War. Although the belief has little basis in historical fact, 16% of respondents volunteered the belief that African Americans fought for the Confederacy in the Civil War, and an additional 4% made a similar but more qualified statement. The distribution of responses was analyzed in terms of respondents' social background characteristics, showing that having an ancestor who fought in the Civil War (for either side) was associated with the belief that African Americans fought for the Confederacy. Qualitative analysis explored narrative strategies employed by respondents, including efforts to explain (or explain away) the contradiction of believing that African Americans fought to preserve the system that enslaved them.

KEYWORDS: Collective memory; history education; university students; race.

Introduction

In the fall of 2010, fourth graders in some Virginia school districts opened their history textbooks (Masoff, 2010) to learn about the U.S. Civil War (1861-65) and read that “[t]housands of Southern Blacks fought in the Confederate ranks, including two Black battalions under the command of Stonewall Jackson” (cited in Coates, 2010). That statement is unsubstantiated by the historical record. Moreover, it is controversial because, if it were true, it would change the moral implications of the U.S. Civil War, by lending credence to the claim that the war was *not* about freedom and political equality for enslaved African Americans, but rather about freedom and equality of Southern states vis à vis the federal government.

Civil War historian Carol Sheriff led a public outcry after discovering the passage in her child’s textbook (Sieff, 2010). In the course of the subsequent investigation, it emerged that the textbook author’s information source was a website maintained by the Sons of

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Confederate Veterans (McNeil, 2004), a political group that promotes ‘Lost Cause’ narratives of the Civil War that exonerate the Southern cause in that conflict (Sieff, 2010). Since the end of the U.S. Civil War over 150 years ago, memory agents have attempted to cast the war in ways that support the moral argument made by their own side, and public controversies about their claims have emerged periodically (Blight, 2001). This article examines the recent history of claims about Black Confederate soldiers and explores university students’ beliefs related to those claims.

For years prior to the textbook debacle, neo-Confederate groups had spun a handful of isolated incidents and misinterpretations of historical traces into an argument that the Confederate cause could not have been racist because African Americans willingly and enthusiastically fought for the Confederacy in great numbers (McNeil, 2004). This claim received some mainstream media attention, but is rejected by serious scholars who argue that there is little evidence to support the claim and that it is a false equivalency motivated by a desire to justify the Southern cause (Carmichael, 2008; Coates, 2010; Levin, 2010; 2011; Levine, 2010). The starting point for our study was our own unanticipated finding that between 16-20% of students surveyed in 2012-2013 at a large, diverse research university in Virginia believed that African-Americans fought for the Confederacy during the American Civil War. (Our data collection took place in two separate samples from the same population six months apart, and since the same result is replicated in both samples, we have some confidence that our finding is reliable.) The results of our survey suggest that despite its historical inaccuracy, the belief that African Americans fought for the Confederacy has begun to enter the collective memory.

Collective memory “refers to the distribution throughout society of beliefs, feelings, moral judgments, and knowledge about the past” (Schwartz, 2007, p. 588). Our data provide insight into the ways in which such beliefs are shared by social groups, helping to ensure cohesion and sustain identity over time (Durkheim, 1968/1915). Beliefs about the past can be deeply held and emotionally charged (Booth, 2008; Zanzanian, 2012) and, like other beliefs, may be difficult to change once they take hold (Nelson, Adams, Branscombe & Schmitt, 2010; Lewandowsky, Ecker, Seifert, Schwarz, & Cook, 2012). Our findings suggest that the study of collective memory is a useful tool for history education scholars seeking to understand the ways in which historical narratives circulating in the culture are received by students (VanSledright, 2008; Reich 2011; Wertsch, 2002; Wertsch & O’Connor, 1994; Wineburg, Mosborg, Porat & Duncan, 2007).

Historical Context: The U.S. Civil War in History and Media Discourse

Overview

The Civil War was fought in the United States from 1861 to 1865, after 11 Southern states declared independence from the nation (we use the terms ‘U.S.A.’, ‘the Union,’ or ‘the North’ interchangeably) and formed the Confederate States of America (‘the Confederacy’ or ‘the South’) after the election of Abraham Lincoln as president. The Southern slave-holding class precipitated this move in order to preserve its right to extend African American enslavement to new territories in the American West (McPherson, 2003/1988). The Civil War was the bloodiest conflict in American history, with over 1,000,000 casualties, more than 620,000 deaths, and with entire swaths of the American South left devastated and impoverished (McPherson, 2003/1988). The Confederate capital, Richmond, was located in the state of Virginia. Many of the largest and bloodiest battles were fought there, and it is the state in which the Confederacy met its final defeat on the battlefield.

African American Participation

African Americans transformed the war and profoundly impacted its outcome in two principal ways. In the North, political activists agitated against slavery, and argued that the U.S. military should recruit and train African Americans to fight (Foner, 2005). In 1863, after the reversal of early Confederate victories, President Lincoln signed the Emancipation Proclamation, freeing enslaved people in captured territory and admitting African American men into the Union Army. By the war's end, African Americans comprised 10% of the Union military (Foner, 2005). These men, despite lower pay and segregated service under White officers, were unequivocally soldiers by choice, training, and combat experience (Du Bois, 2013/1935; Foner, 2005; McPherson, 2003/1998).

In the South, enslaved men and women were used extensively by the Confederate States of America and its armies to support the war effort — though not as soldiers. The enslaved labored as cooks, built fortifications, and tended to their enslavers, the wounded, and the sick (Carmichael, 2008; Du Bois, 2013/1935; Foner, 2005; Jordan, 1995; McPherson, 2003/1998). Many enslaved and free African Americans in the South deserted or gave aid to the Union side (Foner, 2005), or participated in what W.E.B. DuBois (2013/1935) called a *general strike* in which work was stopped or reduced. There may be some isolated examples of enslaved African Americans in Confederate Army camps who took up arms in the chaos of battle (Jordan, 1995), but these incidents cannot be considered “patriotic expressions of Confederate loyalty” (Carmichael, 2008, para. 4).

Some Confederate political leaders recognized the potential value of African Americans to the military, and called for a policy in which some form of freedom would be exchanged for military service (Levine, 2006). That proposal met with fierce opposition from Confederate politicians, citizens and soldiers who argued that it was inconsistent with the defense of slavery, and that arming African Americans was foolhardy and dangerous (Levine, 2006). At the very end of the war, in 1865, the Confederate government did adopt a policy that allowed enslavers to volunteer their slaves for military training and eventual field deployment. To ensure loyalty, Black Confederate soldiers would be offered limited freedom, akin to peonage. That plan was an unmitigated failure (Levine, 2006), however. Few enslavers offered their chattel to the Confederate Army, fewer than 100 men received military training as a result of this policy, and there is little evidence that they were ever deployed outside limited defensive roles in the city of Richmond, Virginia (Levine, 2006).

In sum, the evidence that enslaved African Americans voted with their feet, often at great personal risk, to join the Union army is overwhelming. The Confederate cause was the cause of slavery, and the greatest fear among White Southerners was an armed African American soldiery. African Americans were present among Confederate Army troops, but were not trained or recognized as soldiers. As such, they may have fought, but only in extenuating circumstances, and the handful of Blacks who were trained to be soldiers never saw action (Levine, 2006).

Media attention

Levine (2010) dates the appearance of the Black Confederate narrative to the 1970s or 1980s. We searched two national newspapers (the *New York Times* and the *Washington Post*), for which data from the 1980s are available in LexisNexis, and found that, prior to 1989, there were no references to “Black Confederates” or related terms in either paper.¹ The historical account may not have come to the attention of the general public until the 1990s, perhaps in part as a reaction to the film *Glory*'s emphasis on Blacks' military service in the Union army (Levin, 2010). By the mid-1990s, however, both national newspapers included some

references, and two Southern newspapers, the *Richmond Times-Dispatch* and the *Atlanta Journal-Constitution*, included even more articles mentioning the topic (see Reich & Corning, 2015).

Our analysis of newspaper article content indicates that the increase in the mid-1990s was mainly due to coverage of the book *Black Confederates and Afro-Yankees in Civil War Virginia*, published in 1995, in which historian Ervin Jordan, himself an African American, discussed evidence that Blacks fought on the Confederate side. The book is one of the only works on the topic published by an academic press (Levin, 2011). Although Jordan's work is frequently invoked by neo-Confederate adherents, the book does little to document the existence of Black Confederate soldiers, instead focusing on the different paths that led some Blacks to support the Confederacy (Levin, 2011). A further increase in references to Black Confederates during 2009-2013 resulted from reporting on the textbook mistake. Although reports emphasized the error, such coverage may have unintentionally contributed to belief in Black Confederates by less-than-careful readers.

School curricula

Given the outcry over the textbook mistake, it seemed unlikely that students in Virginia or other states would have been systematically exposed in school to accounts of Black Confederates, but we reviewed the curriculum standards for four states where large proportions of our sample had attended high school: Virginia (roughly three-quarters of the sample), Pennsylvania, Maryland, New York, and New Jersey. We found no references to Black Confederates in any state-mandated high school curriculum (Commonwealth of Pennsylvania, 2015; Maryland State Department of Education, 2014; New York State Education Department, 1999; State of NJ Department of Education, 2014; Virginia Department of Education [VDOE], 2008a; 2008b). Thus, exposure to the idea most probably resulted from the recent media coverage, and/or from discussions within families or among friends. With this in mind, we developed several hypotheses about social background factors that might influence which of our survey respondents were most likely to be exposed to the belief about Black Confederates and to recall it.

Potential Sources of Students' Beliefs about Black Confederates

School

In Virginia and other states, K-12 history curricula tend to frame the Civil War as a conflict between Whites over the issues of slavery, freedom, and federalism (Anderson & Metzger, 2011), often neglecting the important role African Americans played. A review of Virginia's K-12 history standards (Virginia Department of Education [VDOE], 2008a; 2008b) indicated that there was no mention of African American soldiers fighting. However, statements in the elementary and middle school curricula (VDOE, 2008a; 2008b) are ambiguous, and can easily be interpreted as supporting the idea that Blacks fought for the Confederacy. For example, the elementary standard (VDOE, 2008a) reads:

The Confederacy relied on enslaved African Americans to raise crops and provide labor for the army. Many enslaved African Americans fled to the Union army as it approached and some fought for the Union. Some free African Americans felt their limited rights could best be protected by supporting the Confederacy. (p. 29)

All students in our sample had at least a high school education, so we cannot test directly for effects of the elementary or high school standards. But we can examine whether different

levels of *higher* education affect beliefs, which may indicate whether years of education beyond K-12 serve to correct misinformation or extend knowledge about African Americans' participation in the Civil War.

Race

Race and racial identity remain salient social factors in U.S. society and culture, and the existence of a race-based social hierarchy is a recurring theme in American social history (Blight, 2001; DuBois, 2013/1935). Even today, racial identity might be an important influence on beliefs about the past, especially about the Civil War. Wineburg and Monte Sano (2008) asked a nationally representative sample of 17-year olds to name the “most famous Americans in history” (p. 1188) and found significant differences between the figures White and Black respondents named. Epstein (2009) found that African American and White students differed not only in their assessments of the significance of actors and events in American history, but also in their interpretations of them. In 2011, the Pew Research Center conducted a study of Americans' attitudes about the Civil War. One question asked about a symbol, the Confederate battle flag, that has been politically divisive, particularly in the South, for generations. The Pew study showed that 41% of Blacks but just 29% of Whites reacted to it negatively (Pew, 2011). Given the emphasis on Black Confederates by proponents of a ‘Lost Cause’ narrative, we expected that African Americans would be the least likely to express a belief in it, with other non-Whites (e.g. Latino/as, Asians) also less likely to do so, and Whites the most likely. Whites might be more likely to have been exposed to the belief, or less critical of its assumption that Blacks were willing to support the system that enslaved them.

Region

We anticipated some regional variation in respondents' exposure to and acceptance of different Civil War narratives. In the Pew survey, self-identified White Southerners were more likely to have a positive reaction to the Confederate flag, and to accept politicians' praise of Confederate leaders as appropriate (Pew, 2011). Respondents in former Confederate and border-states might have been especially likely to have been exposed to a ‘Lost Cause’ collective memory (see Blight, 2001) and other elements of a neo-Confederate narrative—including a narrative of Black Confederates.

Family

Family can be an important avenue for socializing individuals into mnemonic communities (Cappelletto, 2003); family history and memories connect individuals to the past and cement family ties (Booth, 2008; Rosenzweig & Thelen, 1998). Some beliefs are sustained for generations within families even when they are not part of the dominant culture's collective memory (Epstein, 2009; Schuman & Corning, 2011). Family military involvement in the Civil War creates a personal connection to that war, and may foster both knowledge of and attachment to related beliefs (Hall, 1998). Respondents whose ancestors fought in support of the Confederacy may have been more likely to hear about Black Confederates, whether from heritage groups or from family members. Moreover, the belief may hold psychological appeal if it helps individuals to recast Confederate ancestors as supporters of states' rights rather than supporters of slavery. For example, Welzer (2008; see also Gross, 2014) reveals the distortions that arose in conversations and the retelling of stories when the children and grandchildren of Germans who lived during the Nazi period attempted to “reconcile the

crimes of ‘the Nazis’ or ‘the Germans’ and the moral integrity of parents or grandparents” (p. 298). Descendants tended to reconstruct past events in ways that exaggerated parents’ or grandparents’ heroism. Similarly, respondents who count Civil War veterans among their relatives might be motivated to recall a more flattering version of past events by remembering a convenient piece of misinformation. At the same time, intimate knowledge of narratives passed down through families can lead some individuals to distance themselves from, challenge, or even reject those narratives (Hall, 1998; Popov & Deák, 2015). Thus, it is not only whether individuals hold a belief that is important, but also how they use those beliefs to make sense of the past — an issue we are able to explore through qualitative analysis of responses.

Methods

We administered an online survey to two probability samples of Virginia Commonwealth University undergraduate and graduate students, one in November-December 2012 (N=480) and one to a second sample in April-May 2013 (N=825). Response rates were 16% in 2012 and 11% in 2013—rates that are at least as high as those obtained by good national telephone surveys at the time (Pew, 2012).²

Our data on beliefs about African American involvement in the Civil War come from a set of two questions. Respondents were first asked, “As far as you know, did African Americans directly participate in any way in the American Civil War?” Those who answered “yes” were then invited to respond in their own words to an open-ended question: “In what way did African Americans participate in the American Civil War?” No limit was placed on what respondents could write in response, and answers varied in length from a single word (e.g., “Soldiers”) to a full paragraph or two, though most consisted of a few words or one sentence. We thus avoided imposing our own preconceptions on respondents, and our assumption is that the aspects of African American participation they noted were those most salient to them. The questions appeared near the beginning of the survey; they followed several general questions about the Civil War, none of which related to African American participation.³

Each response was coded in terms of two types of content: mentions of fighting, and mentions of other forms of assistance or support. The two content coding schemes were not mutually exclusive. Responses mentioning military action were then further coded according to which side (if any) African Americans were said to have fought on. Coding was carried out by two independent coders; agreement between the coders was 93% for the “fighting” codes and 92% for the “other participation” codes.

Ordinarily, we might assume that chance sampling error was the best explanation for a finding as surprising as the relatively large percentage of respondents who expressed a belief that African Americans fought for the Confederacy – or at least, we would not treat such a result seriously without successfully replicating it. In fact, because our survey was conducted at two different time points six months apart, with two separate samples drawn from the same population, we have just such a replication. Distributions on our dependent variables differed by no more than 2 percentage points between the two samples, and there were only minor differences in the samples’ demographic distributions. A comparison of mentions of African Americans fighting for the Confederacy in the two samples shows that there is no significant difference between the two ($\chi^2 = .099$, $df = 1$, n.s.); comparisons of mentions of African Americans fighting for the Union or for both sides also yielded non-significant differences. Therefore, we treat the finding as reliable, and we combine the two samples for our analysis of social background factors related to the belief in Black Confederates (N=1,305).

To gain an in-depth understanding of the specific narrative elements salient to respondents, we performed a qualitative analysis for a sub-sample (N=101) of responses mentioning Black Confederates. Codes are grounded in the data (Strauss & Corbin, 1998), and code development used abductive reasoning through a constant comparison of the responses (Dey, 2007; cf. Glaser & Strauss, 1967). Most responses did not recognize or otherwise comment on the anomaly inherent in the claim that African Americans fought for the Confederacy, but those that did were coded according to the type of justification employed. The goals of quantitative and qualitative analyses, and the grain size of the data that each examines, are different (Greene, 2001; Roth, 2009). In a design such as ours, the conclusions of each analysis can be in tension with the other. Greene (2001) explains that “it is precisely in these tensions and points of conflict that mixed-method inquiry offers its greatest potential for better understanding” (p. 251). Through the constant comparative method, 100% inter-rater agreement on the coding was achieved. Quotes presented below are usually reproduced in their entirety (with occasional excerpts indicated by ellipses) and grammatical and factual errors left intact.

Limitations of the study

Our survey sample was restricted to students at a single university in Virginia. Thus, a major limitation of our study is its lack of generalizability: we do not know how typical the university we studied is compared to other universities in the American South. In the qualitative section, we analyzed a subset of the available data, and in some cases, we discuss groups of responses that only contain two participants. The qualitative analysis should be understood as presenting a range of possible beliefs, on the assumption that it is plausible that others might respond similarly, but without indicating what proportion might do so in a larger population or sample (Roth, 2009).

A second concern is how representative the sample is of the university’s student population, and in particular, whether students who responded to our survey are different from those who did not respond in systematic ways that may affect our results. Survey response rates have fallen dramatically over the past several decades, and non-response bias has increasingly become a concern. However, recent work on non-response indicates that there is no necessary connection between response rates and bias, particularly when relationships rather than point estimates are at issue, as is the case for most results we present, and when the beliefs or attitudes studied are unrelated to the decision to participate in a survey (Abraham, Helms, & Presser 2009; Groves, & Peytcheva 2008). In addition, Druckman and Kam (2011) argue that limited samples often yield generalizable results.

In light of both the general decline in response rates and the fact that our sample represents a limited population, we are sensitive to the need for caution when interpreting univariate estimates from our survey. Although the starting point for our study was the surprisingly large percentage of respondents claiming that African-Americans fought on the Confederate side, our main focus is not the point estimate itself, but rather the relationships of social background variables to the belief in Black Confederates.

Results

Military participation by African Americans

In answer to our initial closed question asking whether African Americans participated directly in the Civil War, 87% of respondents said “yes,” and nearly all responded to the

follow-up question asking about the nature of participation. Table 1 shows the different types of participation mentioned by respondents. Thirty-six percent mentioned fighting without specifying a side, but among those who did note a side, the largest group identified African Americans as fighting for the Union only (24%), while just 1% indicated that African Americans fought for the Confederacy only. Strikingly, however, 15% said they believed that African Americans had fought on *both* sides. For example, “They fought as soldiers in both the Union and Confederate Armies”; “They fought on both sides and there were black spies from the North.”

TABLE 1. PERCENTAGES MENTIONING TYPES OF PARTICIPATION BY AFRICAN AMERICANS DURING THE CIVIL WAR

	% (N=1,305)
Fought, but side not specified	36
Fought for Union only	24
Fought for Confederacy only	1
Fought for both sides	15
Fought for both sides, with qualification	4
Only non-military participation mentioned	4
Did not participate or don't know	16
<i>Total</i>	<i>100</i>

Table 1 also shows that a further 4% said that Blacks had fought for both sides, but qualified their statement in some way. This group included respondents who said that Blacks had fought mainly for the Union, but in a few instances for the Confederacy; who stressed that Blacks served in support roles, were not fully recognized as soldiers, or were vague about the precise nature of Blacks' roles within the Confederate Army; or who used phrases like “I think,” “I've heard,” or otherwise expressed uncertainty about Blacks fighting to support the South. For instance: “They volunteered and fought on the side of the Union forces. Some few actually fought on the Confederate side as well”; “As soldiers - I think for both sides, as well as in many kinds of support roles.”

It is important to note that our “military participation” code was used only for responses that explicitly mentioned fighting, military service, or “being a soldier.” Thirty-five percent of respondents mentioned non-military forms of support provided by African Americans to the war effort (North, South, or both), including assistance on the battlefield, such as medical support, trench-digging, enslaved camp servants, etc. However, nearly all of these respondents *also* explicitly mentioned fighting; as the table shows, just 4% of respondents noted other forms of support *without* mentioning military involvement.

The small number who said “no, African Americans did not participate directly in the Civil War” (3%) or “don't know” (10%), plus a further 3% who said that African Americans had participated, but did not give any codable response to the follow-up open-ended question, are combined in the “Did not participate or don't know” category shown in Table 1.

It was conceivable that respondents who claimed African Americans fought for the Confederacy meant to note an oddity rather than a widespread phenomenon. Therefore, we examined the words respondents chose to describe numbers of soldiers who fought for the Confederacy. Of those who wrote about Black Confederates, most (64%) did not give any indication of the number of soldiers involved, simply referring to “they” or “African

Americans.” Of those who did indicate a number in some way, however, nearly one-third referred to “many” (e.g., “Many fought on both sides”) and almost two-thirds referred to “some” (e.g., “Some African Americans fought as soldiers on both sides of the war”), while just 7% indicated that only a “few” had fought. It thus seems likely that most respondents believed Black Confederates to have fought in historically significant numbers.

In sum, it is *military* involvement that came to mind most strongly for our respondents when asked about Blacks’ participation in the Civil War: altogether, 80% of respondents mentioned fighting, while just one-third of the sample noted any *other* forms of participation. Moreover, although serious historians generally agree that fewer than 100 enslaved men were employed as Confederate soldiers at the very end of the war (Carmichael, 2008; Levine, 2006), a total of 16% volunteered that Blacks fought for the Confederacy alone or for the Confederacy and the Union both, with no attempt to contrast the scale of their participation on the Union side with their Confederate role or to indicate that fighting for the Confederate cause was a rare exception rather than the rule.

Effects of Social Background Characteristics

In our logistic regression models, we focus on the 16% of respondents who mentioned a belief in Black Confederates *without* qualifying their statement – a conservative coding that excludes those who conveyed any uncertainty about the claim or any sense at all that African Americans fought on behalf of the Confederacy only in small numbers. Our main dependent variable is coded “1” for any mention of African Americans fighting on the Confederate side, and “0” for any other response, including no mention of African Americans fighting in the war and “don’t know.”⁴

We examine the effects of four social background variables that might be related to beliefs about Black Confederates: education, race, region, and family Civil War veteran ancestry. Educational attainment is represented using dichotomous variables for high school degree only, some college in addition to a high school degree, and college degree, with graduate school as the reference category. Dichotomous variables represent each racial group (African American, Other non-White, White, and No answer), with White the reference category. To examine effects of region, we distinguished between respondents who attended high school in former Confederate or border-states (‘South’) and others (‘non-South’), with non-South the reference category. Finally, we used a question about whether respondents had an ancestor who fought in the Civil War, and if so, on which side, to create a set of dichotomous variables for family military ancestry: Confederate ancestor, Union ancestor, ancestors on both sides, ancestor but don’t know on which side, and no ancestor (the reference category). In addition, our models controlled for gender and age. Gender might affect the degree to which respondents were interested in the Civil War or followed news related to it, but there was no gender difference in mentions of fighting for the Confederacy. Age is related to mentions of fighting for both sides, but our age distribution is too restricted to fully explore its effects.

Education, race, and region

We found no main effect of higher education on beliefs about Black Confederates. In a separate regression, we tested the effect of higher education on mentions of African American participation as soldiers for the Union, but also found no effect. Thus, educational attainment beyond high school neither corrected misapprehensions nor contributed to knowledge about African Americans’ participation in the Civil War.

For race, the direction of the effect shown in Table 2 is as expected, with Blacks and other respondents of color less likely than Whites to mention Black Confederates, but the differences are not significant. Region of high school attendance also showed no effect, perhaps because the specific Civil War narratives to which respondents are exposed vary greatly within such broad regional categories.⁵

TABLE 2. LOGISTIC REGRESSION OF MENTIONS OF BLACK CONFEDERATES ON SOCIAL BACKGROUND CHARACTERISTICS (N=1,286)

	Model 1		Model 2	
	Odds ratio	(sig.)	Odds ratio	(sig.)
Gender (male)	1.215	(.214)	1.124	(.469)
Age	1.026	(.011)	1.023	(.023)
Educational attainment (reference=graduate school)				
High school degree only	0.945	(.851)	0.982	(.952)
Some college	0.939	(.743)	0.928	(.702)
College degree	0.723	(.249)	0.676	(.171)
Race (reference=White)				
Black	0.827	(.441)	1.000	(.999)
Other non-White	0.743	(.142)	.959	(.989)
No answer on race	0.780	(.471)	.350	(.721)
Attended high school in South	1.273	(.285)	1.080	(.741)
Family Civil War military ancestry (reference=No Civil War ancestry)				
Confederate only			1.921	(.004)
Both Union and Confederate			2.094	(.011)
Union only			1.947	(.039)
Don't know on which side			1.717	(.156)
Constant	0.091		0.070	

The role of family

We found a significant association between Civil War military ancestry and beliefs about Black Confederates. We anticipated that respondents who knew that an ancestor had fought in the Civil War, especially on the Confederate side, might be more likely to be familiar with the myth and to accept it as true, either because they had heard about it from their families or because, by seeming to support the claim that the Civil War was not primarily fought over slavery, it might help show their family's involvement in a more favorable light. About one-quarter of respondents had an ancestor who fought in the Civil War: 5% reported having an ancestor who had fought for the Union, 11% for the Confederacy, 6% had ancestors who had fought on both sides, and 4% had an ancestor who had fought, but the respondent did not

know on which side. We add the family ancestry variables as a separate step, in Model 2 in Table 2, because ancestry is correlated with both race and region of high school attendance. We found that having *any* family Civil War veteran—whether on the Northern, Southern, or both sides—was associated with greater likelihood of mentioning that African Americans fought for the Confederacy. Separately, we tested whether a similar effect occurred for mentions of African Americans fighting for the North, but in that case we found no effect of ancestry whatsoever.

We wondered whether the effect of Civil War veteran ancestry might have occurred because Black Confederates had featured in family stories that may have circulated. Another survey question asked respondents whether “any stories about the war had been handed down” in their families. Overall, 13% of respondents recalled such stories, but among those with an ancestor who had fought in the war, 43% did so. When that variable is added to the logistic regression model that includes the ancestry variables, however, it has no significant effect. Our results thus suggest that at least where the myth of Black Confederates is concerned, stories shared across generations are not an important source of information. Instead, family history may sensitize individuals to information about the Civil War with the possible effect of increasing the likelihood that they remember information they encounter.

Qualitative Results

Our qualitative analysis focused on a sub-sample ($n=101$) of responses from those who claimed that Blacks fought for both sides. Just over half of these responses went beyond the mere mention that “Blacks fought on both sides,” attempting to explain why African Americans would fight, as they believed, to defend the system that enslaved them, or explicitly denying that any such explanation was needed. We were particularly curious as to whether the additional content might shed light on how participants reconciled the knowledge that the Confederacy was a slave power with the belief that this slave power would arm the enslaved and that the enslaved would fight for their enslavers. We found that of the responses that recognized African Americans’ unique position, 43% attempted to reconcile belief in Black Confederates with historical knowledge about the racial aspect of the conflict. Overall, responses that attempted to explain why African Americans would fight for the Confederacy represented less than a quarter of the fought-for-both-sides responses. We cannot generalize from this small subset to the larger group of respondents who did not include much, if any, detail. Nevertheless, we argue that these particular responses complicate the quantitative findings because they indicate that respondents who claimed that African Americans fought for both sides are characterized by diverse ways of understanding the role that race and enslavement played in the Civil War (see Greene, 2001; Roth, 2009 for a methodological justification). We will take this issue up again in the discussion section below.

We discerned four different strategies for justifying the belief that African Americans fought for the Confederacy as well as for the Union: first, some respondents explained that, although Blacks *chose* to fight for the North, they were *forced* to fight for the South; a second group claimed that Blacks fought in exchange for freedom or for better treatment; and a third said that Blacks fought in place of Whites. A fourth group approached the paradox by denying it, arguing that Blacks who fought did so “just like” Whites and for the same reasons.

Forced to fight

Responses coded as “forced to fight” were the most numerous. The following response, from a White woman, is typical: “Many African Americans participated as soldiers on both sides, sometimes willingly and sometimes unwillingly.” Others, like the following from a White and an African American woman, respectively, added a little more detail:

African Americans were forced to participate in combat on behalf of the Confederacy, as slave owners were able to enlist their slaves. African Americans were also able to enlist in special regiments of the Union Army, as well as being important in war supplemental activity (producing food, etc.).

For those who were still in slavery, they were forced to fight for the confederate army. For those who lived in the free states, they volunteered. There were strict laws against African Americans in the south for joining the Union. If they were caught they were either killed or tortured. A lot of African Americans fought in the war to end slavery in the US.

Both of these responses contain elements that are historically accurate, particularly in regards to African American enlistment in the Union army. Both respondents claim that African Americans were forced to fight for the Confederacy. Although, as noted above, African Americans were forced to serve in non-combat positions in the Confederate Army, only a very small number were handed over by their enslavers for combat training, and only at the very end of the war (Levine, 2006). Yet the language used by these respondents does not indicate a difference in the scale or the nature of African American participation in the two armies.

Fighting in place of Whites

Some responses reconciled fighting for the Confederacy with slavery by mentioning a policy allowing African Americans to fight in place of their White owners. (No such policy ever existed, however.) For example, a White woman explained that “... African Americans also fought on the Confederate side, having been used to buy their owners out of military service—for 20 slaves ...” A multi-racial man explained that “... slave owners were allowed to send their slaves into battle instead of them going themselves.” This sort of exploitation is certainly imaginable in an epoch that sanctioned chattel slavery, and in which wealthy families in the North could buy their sons out of military service for \$300 (McPherson, 2003/1998). These respondents make use of partial information about the past to construct narratives that explain phenomena in ways that are plausible for their authors, despite inaccuracies.

Fighting in exchange

Respondents who claimed that African Americans fought for the South in exchange for freedom also attempted to reconcile their belief that Blacks fought for the Confederacy with their knowledge of enslavement. These explanations tended to be more thorough, despite historical inaccuracies. A White woman explained that “... some African Americans fought in the war for freedom that their 'masters' had offered and some for money or their right to be free.” A White man explained that “... some southern slaves and freedmen actually volunteered to fight in the Confederate Army—in exchange for their freedom or to keep the lands they already held.” In both of these responses there is a clear social contract in which army service is exchanged for freedom, money, and/or the right to keep property.

One response, by an African American woman, handles the contradiction of slavery with Confederate military service as an opportunity, rather than a renegotiation of the social contract:

... slaves in the south fought with the expectation that they would be looked upon favorably for helping their masters, and some were unaware of what the north had in store for them so they fought.

The respondent's empathy draws on contextual knowledge of the conditions of enslavement to imagine that, with few chances for improvement, it is plausible that enslaved men seized upon an opportunity that presented itself (see Carmichael, 2008; Jordan, 1995).

Fighting just like Whites

Finally, two responses explicitly stated that African Americans performed the same roles as Whites in the Civil War. One, by a White woman, explained that "They were soldiers and fought in the war like everyone else. African Americans fought for both Union and Confederate troops." A mixed-race man who is descended from a Confederate soldier explained that:

Not only were black Americans part of Union forces, but they were part of Confederate forces as well. Alabama had the first black regiment made of free and slave alike in 1862. Many fought for the same reason whites, Irish, and Jewish Confederates fought, for their homes. Less than 10% of the entire South owned slaves. And some Union soldiers from Kentucky and Missouri owned slaves as well, so how come nobody mentions that? Also, the Emancipation Proclamation freed all slaves in Confederate territory, not Union, where slavery was still legal in Kentucky and Missouri until 1865. At the time of the Emancipation Proclamation, the CSA was its own sovereign territory, therefore, nothing happened at all. But many black Americans participated in the fight to DEFEND the South as well. I wish this history were more well known.

The response appears to be part of a conversation with an imaginary interlocutor in which the respondent seeks to refute points in an argument, mixing fact with fiction to support a neo-Confederate narrative. Both of these respondents attempted to remove race as a salient factor from the Civil War, denying the paradox of slaves fighting to preserve slavery. Thus, among the small number of respondents who attempted to explain why, as they believed, African Americans fought for the Confederacy, only two constructed responses that were consistent with the neo-Confederate beliefs of those who actively promote this idea.

Discussion and Implications

The finding that a sizable percentage of our respondents believed that African Americans fought for both the Union and Confederacy in the U.S. Civil War offers a glimpse of the process in which ideas about the past that circulate through society have been adopted by some of its members. This particular idea was initially promoted by fringe political groups based largely in the South, with little support from either the historical literature or the high school curricula of the states in which our respondents received their secondary education. The lack of a statistically significant association between the belief and the race or state of origin of our respondents, however, suggests that it is being taken up by people beyond the narrow, racially and geographically homogeneous groups with whom it originated.

It is tempting to infer that the expression of this belief reflects the mobilization of a particular set of ideas and identities. Yet we showed that most respondents did *not* employ the belief in Black Confederates to justify a neo-Confederate narrative that identifies the Southern cause with support for states' rights and patriotism rather than slavery. Fewer than half of our respondents provided information beyond the statement that African Americans fought on

both sides. Among those who did, most sought to explain why Blacks might have fought for the Confederacy in terms of their knowledge of the slave system and its coercive power and limited opportunities for the enslaved. Only two out of 101 gave answers—we called them “fighting just like Whites”—that employed the belief in Black Confederates to justify the Southern cause. In other words, our respondents did not simply accept ideas about the past. Instead, they used the belief in Black Confederates in a variety of ways, including in arguments that run counter to the intentions of the memory agents who promoted the narrative.

As some scholars of collective memory have urged, it is important to examine the degree to which beliefs about the past introduced or encouraged by memory agents are actually accepted by members of the broader public (see Confino, 1997; Kansteiner, 2002; Wertsch, 2002; 1998). The mixed-method design of this study allowed us to do so in unique ways. Had we relied only on quantitative findings we might have been tempted to conclude that the narrative of Black Confederates promoted by neo-Confederate groups had been adopted whole-cloth by 16% of our respondents. The qualitative findings allow us to examine *how* beliefs promoted by memory agents are used, and repurposed, by individuals (Wertsch, 1998). We do not wish to minimize the potential of political groups to promote gross distortions of the historical record in order to influence the political economy in troubling ways, but rather to emphasize the importance of investigating how such myths, once taken up, are used to make sense of the past.

The historical record clearly points to vastly different levels of African American military and moral support for the Union and Confederate sides in the Civil War. This support can be measured in terms of the numbers of people working for each side and the nature of that labor (Foner, 2005; Levine, 2006). African American activists, such as Frederick Douglass lobbied the Lincoln administration for the chance to prove their patriotism as soldiers in the Union Army. When that wish was granted in 1863, African American men enthusiastically joined the Union military as soldiers. Confederates forced African Americans to perform menial tasks and were loath to allow them access to weapons, let alone train them as soldiers. “Soldier” itself is an ambiguous concept. Not all soldiers fight by choice, and many people who are called soldiers in fact do no fighting at all but tend to the infrastructure needed to facilitate fighting. This ambiguity complicates the case of defining the identity of enslaved African Americans who were laboring for the Confederate Army, and may have made acceptance of the belief that African Americans fought easier. The ambiguity over who is considered a soldier has certainly been exploited by neo-Confederate groups whose aim is to remove slavery and race from the moral calculus of the U.S. Civil War by claiming that African Americans enthusiastically supported the Confederacy. Historians and memory agents employ different epistemologies and the use of historical information in different ways. For historians, interest often turns to sites of ambiguity, the particular events that challenge what is essentialized in collective memory (Wineburg, 2001). Memory agents engaged in the politics of memory can exploit ambiguity in the historical record to support the plausibility of a narrative in the public sphere, where it can be repeated often enough to become a collective memory.

If memory agents are engaged in politics of memory that distorts an ambiguous historical record, what are history educators to do? 1) We should conduct basic research to study the beliefs young people hold about the past; 2) We should draw on that research in constructing curricula in order to take those beliefs into account; 3) Our pedagogy should recognize the existence of a politics of memory.

Recent conceptual scholarship in history education has suggested that K-12 curricula should be designed to occupy a space between academic history and collective memory

(Seixas, 2016). Nordgren and Johannsson (2015) have argued that K-12 curricula should include explicit instruction on how history is used in contemporary political discourses. This goes beyond fact-checking and myth-busting (see Nelson et al., 2010; Lewandowsky, et al. 2012 for the difficulty of this task) to a broader understanding of the rhetoric of history and how historical representations are mobilized to produce identities and affect political choices. An approach that includes the politics of memory as integral to the subject of history seeks to provide students with tools that give them greater agency in how they orient themselves in time and space (Rüsen, 2005). To do so effectively, however, we need an ongoing program of basic research on collective memory that informs curriculum developers about the specific beliefs that students bring to the classroom, and how those beliefs are used by youth to construct a historical consciousness. As a scholarly community we have taken seriously the modes in which historical knowledge is built and how to recontextualize the work of historians for primary and secondary education classrooms. Helping students understand how memory agents attempt to influence their own historical consciousness can support the larger aims of the historical-thinking project – a more informed and active citizenry.

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Endnotes

¹ We searched the LexisNexis database for the years 1980-2013 to identify articles that included "Black Confederates" or related terms (e.g., "African American Confederates," "Confederate Slaves"), and found a total of 61 articles that included such references (often only a passing mention). Our starting point was 1980 because that is the first year articles from both the *New York Times* and the *Washington Post* are available. Only articles from 1991 on are available for the *Atlanta Journal-Constitution*, and from 1995 on for the *Richmond Times Dispatch*.

² Response rates are calculated according to AAPOR RR3. Survey respondents were offered the opportunity to participate in a lottery to win one of several incentives.

³ Our larger study was designed in part to examine the effect of visual images on characterizations of African American participation in the war, with respondents randomly assigned to each of three conditions: no image, an image of Lincoln with a freed slave, and an image of an African American Union soldier. Only samples from the first two conditions are used here. In the fall 2012 survey, respondents viewed no image, and in spring 2013, a split ballot was used to randomly assign respondents to either the Lincoln image or the soldier image condition. In terms of the distribution of beliefs about whether and on which side African Americans fought, there was no significant difference between seeing no image and seeing the Lincoln image. However, the image of the African American Union soldier had a small but significant effect on response distributions, so we exclude the sample assigned to that condition from our analyses here. Including a control for Lincoln image exposure in all regression models did not affect any of the results we report here, so it is omitted from the models in Table 2.

⁴ Our dependent variable counts only unqualified responses as "1," but including qualified mentions, or restricting to those who said that Blacks fought for *both* sides, does not affect conclusions.

⁵ A significant interaction indicated that the effect of race differed depending on region. Blacks who had attended high school outside the South were much *more* likely to mention Black Confederates, while Blacks who attended school in the South

were *less* likely to do so. In light of the very small number of Blacks in our sample who attended high school outside the South, however, we treat this result as uncertain.

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About the Author

Gabriel Reich is Associate Professor in the Department of Teaching and Learning at the Virginia Commonwealth University.

Author Email: greich@vcu.edu

Amy Corning is Adjunct Assistant Research Scientist in the Survey Research Center at the University of Michigan.



History Wars in Sweden? A syllabus debate about nation, history, and identity

Johan Samuelson
Karlstad University

ABSTRACT: History teaching and learning in schools has been the subject of history culture wars in countries such as Sweden, Australia, the US, and Canada. In a Swedish-specific context, this and similar debates should be viewed in relation to the fact that throughout the twentieth century, governments in Sweden, as well as other countries, have regarded history teaching in schools as an important builder of national consciousness. At the same time, Sweden has undergone substantial demographic changes in recent decades. This article analyzes the different perspectives put forward in a debate on the school subject of history in Swedish education as a new syllabus was being introduced. Seixas' approaches to history are used in the analysis. The debate was initiated by historians who criticized the syllabus for the absence of the period of Antiquity. Leading politicians also participated. The collective memory approach was a central perspective on history in schools in the debate.

KEYWORDS: History Wars; Social Studies Wars; Identity; Nation; Curriculum.

Introduction

Antiquity is the cradle of Western civilization. The Middle Ages are a key process through which Sweden became a country: cities were built, our country was Christianized and trade with merchants and money grew. For me it is inconceivable that these parts should be removed from teaching in schools. I can assure those who are worried about this change that it will not be approved by the government. (Björklund, 2010a, p. 2)

The citation is taken from the political and educational discussion that started with the launch of a new syllabus in history for compulsory education (Lgr 11) and a critical article by famous Swedish historian, Dick Harrison.¹ The Swedish Minister for Education, Jan Björklund, made clear that one of the presumed key tasks of history teachers has been and still is to foster all students into a national, and to some extent, Western identity.² This fostering should be done through a transmission of crucial parts in older national and to some extent European history. Antiquity, the Middle Ages, Christianity and trade were themes in this narrative of how 'Sweden became Sweden'.

The collective memory approach to history teaching, which Björklund advocated, has a long tradition in Sweden and other countries, but has also been under pressure in a globalized world (Carretero, Rodríguez-Moneo & Asensio, 2012; Seixas, 2007; Evans, 2004; Taylor, 2010; Olofsson et al. 2017; Samuelsson & Wendell, 2016). The controversy surrounding history syllabi has been intense internationally, as well as in Sweden, and can be described as a kind of history and culture wars set of debates. They should be viewed in the context of governments in Sweden and other countries, throughout the twentieth century,

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regarding school history teaching as an important builder of national consciousness (Nakou & Apostolidou, 2010; Barton, 2012a; Grever, 2012; Ahonen, 2001; Åström Elmersjö, 2013). At the same time, Sweden (and other nations) has undergone substantial changes in recent decades. The ethnically homogenous Swedish classroom of yesterday is not uncommonly a multicultural one today. It is above all in the past 40 years that immigration to Sweden has increased. Presently, 20% of the population is of foreign origin. (Löden, 2008; Eliasson & Nordgren, 2016) This development posed a challenge to history in school, as became clear in Sweden with the presentation of the proposed new syllabus for history.

This article analyzes the role of history teaching in a national school system that has to accommodate an increasingly multicultural group of students. This article relates this development to the political ambition of having a historical canon in the age of accountability. More specifically, this article analyzes the different perspectives put forward in the debate on the history subject in Swedish education and the debaters' premises. The analysis is also related to an international context. Two research questions are posed in relation to the debaters' argumentation: (1) What was seen as the overriding purpose of the history subject? (2) What content was seen as central to history teaching?

Research context

The interest in the relationship between national identity and history has had a central position in historiography for a long time. On this issue, Berger & Conrad (2015) show that methodological nationalism has become prominent in recent years. The statement made by the Swedish Minister for Education, Jan Björklund, and the subsequent debate about the role of history in school can be seen as part of the general trend in the Western world, in which national history is challenged and discussed in a multicultural society (Nordgren & Johansson, 2015; Seixas, 2007; Myers, 2006). This trend, as well as other controversies regarding syllabi content, is reflected in the debate analysed here.

According to Parkes (2007), Symcox (2002), and Éthier & Lefrançois (2012), the struggle over history education can also be seen as a *culture war*, *history curriculum war* or *memory war* about national identity. Similar trends are also found in countries such as Scotland (Hillis, 2010), Canada (Éthier & Lefrançois, 2012), and Australia (Taylor, 2010; Parkes, 2007), where changes in history syllabuses have resulted in intense debates about national identity and about whose history should be included in the outcomes, objectives, and/or content of the curriculum. The question also arises of how particular historical events such as the World War II in Estonia (Potapenko, 2010), 18th century colonization of Australia (Taylor, 2010; Parkes, 2007), or the battles between the British and the French in Québec should be represented (Éthier & Lefrançois, 2012).

According to Barton (2012b), it can be precarious to draw too close a parallel between the public debates in various countries and their different systems of education and historical traditions. However, the debates still seem to share general features indicating that the organization, content and purpose of history and its related school subjects such as social studies have been the object of history wars.

One conflict has revolved around how teaching should be organized and conducted in countries such as Sweden, Australia, USA, and Canada, where some progressive educators have advocated a coherent and subject-integrated curriculum with an overall teaching aim of educating students to be critical and reflective citizens. The critics of this system have emphasized the need for social instruction based on the outlook and methods of a particular subject.

Another conflict area has been the content of teaching. Somewhat oversimplified, it is possible to see a group of debaters advocating national narratives as well as teacher-led education and proper historical facts as constituting the key to good civics. The glorious past of a nation should be the focus of attention. Opponents of this perspective emphasize contemporary relevance and the need to adopt problem-based approaches in the classrooms. Examples of this are to be found in Argentina, the USA and Sweden (Taylor & Guyver, 2012; Evans, 2004; Stearns, 2010; Karlsson, 2009).

Barton (2012b) also points out that the occurrence of public history wars does not mean that the conflicts reach classroom level. Rather, he suggests that, 'This war, then, exists almost entirely at a rhetorical level' (2012b, p. 196). Referring to the USA, Barton claims that teachers have to handle the differences between the perspectives in the classroom on a daily basis. Similarly, Taylor and Guyver suggest that history wars can be viewed simply as public debates on the purpose of history, constituting 'politicized controversies that frequently surround societal imaginings and depictions of national, cultural, racial, ethnic, tribal and religious pasts' (2012, p. xii).

The article focuses on the public debate, not on how teachers actually deal with these issues.

Analytical premises

To analyze the perspectives on history that feature in the debate more specifically, in the main concepts and perspectives from North-American theories are drawn on for this article. Researchers such as Bruce VanSledright, Peter Seixas and Stéphane Lévesque have been active in an American context where questions about multiculturalism, nation, history, and identity have been intensely debated for a long time. But this question is of great relevance to a formerly homogeneous country such as Sweden that is now turning into a more multicultural nation.

Scholars have developed a broad perspective on different views of history where questions about history and identity in a multicultural world are central. Peter Seixas (2007) and others see three general perspectives on history in schools: the collective memory approach, the disciplinary approach and the postmodern approach.

The collective memory approach emphasizes identity in different communities. Collective memory is a type of social memory connected to different groups, such as social classes, families, associations or trade unions. In this kind of memory individuals are connected to a larger group. In history as it is taught in schools, the nation is usually the community in focus. The role of school history, in a collective memory approach, is to tell a grand national narrative in which different events, ideas and persons are parts of the development from the past to current society. Education can hereby contribute to social cohesion and citizenship (Barton, 2012a; Seixas, 2007; VanSledright, 2011; Lévesque, 2008; Assmann & Conrad, 2010; Aronsson, 2012). Often the collective memory approach emphasizes a common Western cultural heritage.

According to a *disciplinary approach* on history teaching in schools, the perspective of the academic discipline is of importance (Seixas, 2000, 2007; Evans, 2012). This perspective is built on a scientific, discipline specific approach to history. Seixas emphasizes that the student should be taught conceptual tools and methods that are used in the discipline, for instance, strategies for criticizing and evaluating sources. Students should be able to ask critical questions about events, people, and institutions of the past. They should also learn how to investigate differences and similarities between various groups. Using this approach, there is no simple right or wrong in history, instead the complexity of people and events in history are

studied through sources. According to Seixas, the approach presents a way of educating critical citizens. Through their training in historical method, replicating the work of historians, students receive tools needed to orient themselves in a complex world (Seixas, 2007).

Contemporary *postmodern perspectives* on history teaching include postmodern as well as intercultural perspectives. In educational theories and curricula there are features of a more postmodern and critical perspective on history as a discipline and on history as taught in school. According to Peter Seixas (2007) and Keith Jenkins (2002), a crucial problem in history teaching based on *one* national narrative is that there is a lack of consensus about what the content of such a narrative should be.³ One argument is that historical narratives and knowledge are connected to different political and ideological interests. This ideological interest is hidden behind the rhetoric that there is an objective and neutral truth about the past. In a postmodern approach, Eurocentric and grand national narratives are challenged and the main role of history here is not to homogenize students into a common national identity. Different identities and cultures are regarded as equally important. The main purpose of teaching history is to facilitate the student's narrative competence and historical consciousness. The student's own questions (and experiences) are important (Seixas, 2000; 2007; Jenkins, 2002). Even if it is not explicitly stated, it is reasonable to expect that modern history acquires a central position as teaching is shaped by students' interests and their questions about the past. This perspective can be understood as a new view of school history, possibly as a result of the insecurity of a monolithic common historical identity in contemporary multicultural society (Karlsson, 2011; Rösen, 2011; Nordgren, 2011).

History as a school subject in the twentieth century: Developments and areas of debate in Sweden

Sweden has a long tradition of a common national compulsory curriculum for all students. Since the 1960s, all students have had the same syllabus in primary schools. Previous curricula, from the early 1900s, were oriented towards a collective memory approach (Englund, 1986; note that Englund does not use the term collective memory). However, the specific aspects of the discipline became more important in the 1960s because of an emphasis on objectivity and scientific ideals. Although a particular historical canon was included in the Syllabus, it has historically emphasized the students' own interests and experiences as important starting points in teaching (Ludvigsson, 2009; Ammert, 2013).

In 1994, a new curriculum (Lpo 94) was introduced in Sweden, which was a specific syllabus for history, but from 2000 there was also an interdisciplinary social studies syllabus, which included religious studies, civics, history and geography. Teachers could choose between teaching according to a subject-specific approach, and taking an integrated approach to social studies. This curriculum was introduced by a Social Democratic government (Larsson, 2001). In Lpo 94 there was no specified core content or standards. The idea was to decrease state control over the content. In theory, Sweden provided an open curriculum, allowing the teacher to decide on content and method in discussion with the students. The Syllabus, however, was criticized for the absence of specific content, by the new right wing government in 2009 (Regeringsbeslut I:1 2009). During this period, there were also articles and debates on the 'crisis of history' (and the 'crisis in school') with a focus on students' lack of knowledge in the context of the reduction of teaching hours for history in Sweden (Hallström, Martinsson & Sjöberg, 2012; Samuelsson, 2014; Elgström & Hellstenius, 2011; Larsson, 2001).

‘School creates historical illiterates’

Jan Björklund was a leading person in the social-liberal Liberal People’s Party, but he distinguished himself as politically conservative in regard to the role of religious studies, for example, and the character and role of the history as a school subject.⁴ In 2001, Björklund published an article, titled ‘School creates historical illiterates’ in one of Sweden’s leading newspapers, in which school in general and history teaching in particular were criticized for the lack of a national canon. He also stated that history ‘provides a cultural identity, which functions as the glue that binds us together in our social community’. In the article, Björklund connected a general declining school system to the status enjoyed by history as a school subject and pointed out that there “is no doubt about the fact that the educational politics aiming to erase our shared educational heritage and creating historical illiterates can only be described as intellectual treason against the coming generations” (Björklund, 2001, p. 2). The article also rejected the idea that history should be integrated into a larger social studies subject.

When Björklund was appointed Minister for Schools in 2006 (and Minister for Education in 2007), a number of reforms were initiated. Grading was introduced earlier, namely in year 6 instead of year 8. The standard-based system was also emphasized with the introduction of core content. National tests were also introduced in new subjects, including history. The development of more tests and clearer curricula in Sweden can also be related to the school reforms in Sweden and other countries where accountability became a crucial principle (Evans, 2012).

All in all, the reforms adopted in Sweden are not unique to this country. In other parts of the world a nationally-oriented history was also increasingly being introduced in schools, or at least declared desirable in debates (Nakou & Apostolidou, 2010; Taylor, 2012; Evans, 2004). When the National Agency for Education’s proposal for a new curriculum became public in 2010, there were expectations, particularly from Björklund and other debaters, that a more canon-oriented curriculum, ascribing a more important role to earlier history, would be the result.⁵

Material and methods

Other studies of Swedish history in public space have shown, for instance, how politicians use the media and history for political gain (see, for example, Zander, 2001). It is also in the context of reforms and changes of curricula that different perspectives of the subject become especially tangible in public debates (Goodson, 2004; Ongstad, 2004). Daily newspapers should therefore be a good source for capturing the public debate on history and perspectives of history.

The main sources in this article are from the media and from the National Agency for Education. There are two types of agency sources: the curriculum proposal circulated for comments, published late in 2009; and the final Syllabus in history published in the spring of 2011.

The research that informed the project that this article is drawn from, is partly informed by publically available media reports, mainly from newspapers. In the main, reports and editorials from the four major national newspapers in Sweden: *Dagens Nyheter*, *Svenska Dagbladet*, *Aftonbladet*, and *Expressen* were collected throughout 2010. In 2012, reports and editorials from the approximately 30 Swedish regional newspapers available via the *Media Archive*, a library research resource, were also included in the research data collection.⁶ With the implementation of the Syllabus taking place in October, 2010, it was included for debate

and discussion in three out of four national newspaper editorials. In the regional press, nine out of around thirty editorials discussed the Syllabus. *Radio Sweden*, the public service broadcaster for radio, also had programs commenting on the Syllabus. Politicians (such as Jan Björklund, Minister for Education), teachers in upper secondary school and university scholars in history, art history, and archaeology also participated in the debate. Typical statements made by different actors and perspectives are included for analysis in this article. The analysis of the material sought to identify attitudes expressed in the media reports towards the curriculum, primarily whether they were positive or negative to the proposal. Also of interest was what (if indeed any) explicit basic arguments justified this attitude, as well as implicit premises or assumptions obvious in the media reports. Finally, the analysis was linked to Seixas' (2000, 2007) theoretical concepts. The categories have been constructed through abduction, combining the theory with the empirical data in the analysis (Bryman, 2012).

‘Antiquity is the cradle of Western civilization’: The draft

In late 2009, a draft of a new history syllabus was developed. The National Agency for Education commissioned an expert group to write it (note that this is the way Syllabuses are usually developed in Sweden). The group was led by scholars with a history education approach. Theoretically, the scholars were inspired by the historical consciousness perspective and by intercultural theories. But, it is also important to note that there were expectations, particularly from Björklund, of a more canon-oriented curriculum ascribing a more important role to earlier history.

In the draft circulated for comments all Syllabuses had the same structure: an introduction which contained the reasons and aims for teaching the subject in different school forms; the *aim and the long-term goals* of teaching in the subject are given; and the *core content* states what the teaching should cover.

In the 2009 draft, part of the overall aim of history was described as follows:

Man's understanding of the past is interwoven with beliefs about the present and perspectives of the future. In this way, the past affects both our lives today and our choices for the future. Women and men throughout the ages have created historical narratives to interpret reality and shape their surroundings. A historical perspective provides us with a set of tools to understand and shape the present we live in. (Skolverket remiss [draft] 2010, p.41, translation Eliasson et al.)

This was not the focus of the debate; rather the core content for years 7–9 was intensely discussed.⁷ In comparison to the earlier Syllabus, this was what was new. This core content was a type of mandatory standardized knowledge. In the Syllabus, the core content included themes from prehistoric times to the present world, but it was mainly early history that was the topic of debate. The first draft had the following content for the period titled *Ancient civilizations from prehistoric times to 1700*:

Comparisons between some early civilization growth and development until the 1700s, for example, in Asia and America.

Some early Mediterranean cultures and the importance of their ideas and ideals for contemporary society.

What historical sources from some early civilization, such as Asia or America, can tell about similarities and differences in living conditions for children, women and men. (Skolverket remiss 2010, p. 44)

Note that ancient history was a part of the core content in relation to a ‘use of history perspective’, stating: “Some concepts, such as ancient times, the interwar and post-war periods as well as different views of their meanings”. (Skolverket remiss [draft] 2010, p. 45)

Government stops the syllabus in history': The debate starts

In the debates, a different perspective on the uses and purposes of history was highlighted. The connection between past and present societies was in focus, or rather, what was understood as a lack of attention to the connections between the past and contemporary society. Apart from a few supporters of the Syllabus, participants in the debate highlighted the importance of the ancient period and the Middle Ages, though not always explicitly connected to a nationalist perspective on history. The 'cradle of civilization argument' recurred in almost all articles. The argument was that the cultural, political and historical roots of Sweden and the Western world could be traced to Antiquity, as the articles by Björklund and Harrison below demonstrate.

The dominance of the collective memory approach

The statement that the roots of a so-called united, *our* national society were in ancient Greece had a crucial role in the debate. The exclusion of ancient Greece from the Syllabus threatened the connection to this vital part of the nation's identity. Explicit or implicit history in schools had a crucial role in giving Swedish students an identity rooted in a Western tradition built on values from ancient Greece. Additionally, the nation's link to Christianity was emphasised. However, there were significant differences as the debate contained two collective memory approaches, emphasizing various aspects of a shared past.

'Christianity, Islam and Judaism have the same cultural roots': An additional collective memory approach

According to a group of scholars and other participants in the debate, the absence of early history and of different cultures could lead to racism, ethnocentrism, and chauvinism. By studying both our own and other cultures, students could receive tools to handle a modern globalized and multicultural world. I call this perspective an additional collective memory approach.⁸ Scholars and editors of liberal-oriented newspapers had this perspective on history. It is not always possible to make a sharp distinction between some of the scholars presented here and the opinion-makers beneath. For instance, Dick Harrison, professor of history, is one of Sweden's best-known historians. He is a popular lecturer, writes for the national daily *Svenska Dagbladet (SvD)*, and has made several historical documentaries for Swedish television. It was Dick Harrison who started the criticism against the Syllabus in a debate article in *Expressen* on 15 February 2010, 'History in school will be a mess' (Harrison, 2010). This article has become a seminal text in the history wars debates in Sweden, particularly on the topic of the new Syllabus. It likely forced the editors to comment on the Syllabus, and The Minister for Education also issues statements subsequent to its publication. Harrison argued that a syllabus including the ancient period and the Middle East was the best way to tackle racism, writing:

The ancient Mediterranean culture, not just the Greek-Roman, but also the Middle East, is the cradle of the whole modern western civilization. It is also the cradle of other Mediterranean cultures which have influenced historical experience through Judaism, Christianity and Islam...A knowledge of these shared roots, and an understanding of their parallel development – sometimes in conflict and sometimes in fruitful friendship — until the present time is the best remedy I can imagine against contemporary racism. (Harrison, 2010, p. 4)

Similar arguments were used by several editorials, for example, Pernilla Ohlin in *Dalarnas Tidning* in the article ‘A historical blunder’ (Ohlin, 2010).⁹ Professors of history, art history, ancient history, history of religions and archaeology criticized the Syllabus in the debate article ‘Understanding will disappear in the new syllabus’ (Andrén, Cullhed, Rystedt, Österberg, et al. 2010, p. 5). Although, in many ways, they had the same view on history as the Syllabus, their intervention highlighted the use of a history perspective, for instance. But, like Harrison, they also criticized the Syllabus for being Eurocentric and too focused on modern history. The argument put forward a long and global perspective on history as a prerequisite for the understanding of contemporary society. They also stressed that new and modern research and perspectives and theories from the humanities were important in the design of the Syllabus. When the scholars discussed the history Syllabus, they also highlighted the importance of a modern religious studies syllabus. According to the researchers, the religious studies syllabus was oldfashioned (Andrén, Cullhed, Rystedt, Österberg, et al, 2010). In a rejoinder the scholars emphasized the necessity of a global history perspective: in a globalized world this was crucial. A school history subject without this viewpoint would betray students in the future (Andrén, Cullhed & Rystedt, 2010).

It is mainly the three debate articles presented here that adopt an additional collective memory approach. The exclusion of ancient Greece from the Syllabus threatened the connection to this vital part of the nation’s identity. Explicitly or implicitly, history in schools had a crucial role in giving Swedish students an identity rooted in a Western tradition built on values from ancient Greece and the Christian tradition. But, at the same time, there was an emphasis on the importance of other cultures. The debaters stressed that a nation is a complex of several cultures, which should be accepted. They also underlined that Sweden is a multicultural, multireligious society where various individuals belonging to different religious traditions, whether Christian, Jewish, or Muslim, must have access to ‘their’ roots. History as a school subject should promote a multicultural society by highlighting various cultural traditions. At the same time, contributors to the debate maintained that history in school has a mission to transmit crucial principles (as democracy) as well as ideas from ancient Mediterranean civilizations and Europe to today’s society.

‘The Viking journeys out of history’? Collective memory with a Western heritage approach in the debate

A number of debate participants centred their argument on the importance of national and Western cultural heritage. This group only consisted of editors of newspapers and right-wing politicians. The comments below can all be seen as a reaction to the Syllabus proposal but also as support of Harrison’s critique of the proposal. However, this support was to depart from Harrison’s intentions. The maintenance of a national identity as well as an understanding of Western cultural roots was likely to be at stake in teaching based on the new Syllabus. The most high-profile proponent of the inclusion of the ancient period and the Middle Ages in the Syllabus was Björklund, the Minister for Education. His position was especially relevant since he had the formal power over the Syllabus content. According to Björklund, in an article published on 17 February, 2010 history *is* an important subject:

History is an important subject in school. History is a crucial part of our general education, but also a tool for understanding the development of contemporary society and the world.

Antiquity is the cradle of Western civilization. The Middle Ages are a key process through which Sweden became a country: cities were built, our country was Christianized and trade with merchants and money grew. (Björklund, 2010a, p. 2)

Two days later after this publication, Björklund also made a statement, in which he included the new Syllabus of religion on the website of the Liberal People's Party. According to the National Agency for Education's proposal that was circulated for comments, Christianity would not have a privileged position in the Syllabus. Not willing to accept this standpoint, Björklund wrote:

History and religious studies are two foundational subjects in our culture. They provide students with a general education and a reference frame and culture identity. These subjects help the student to understand why our country and world look like they do today. (Björklund, 2010b, p. 2)

Similar statements were also published in the media by researchers, journalists, and social commentators. One group of debaters, mainly editors of conservative and liberal newspapers, stressed the need to include classical education in history teaching, for example, hyperbole comments such as: "Do not abolish Socrates!" ('Avskaffa inte Sokrates!' (editorial), 2010, p. A2.); "Uneducation sufficient for the people?" (Michajlov, 2010, p. A23); "History: Very, very old" (Berggren, 2010, p. A4); and "The Viking journeys out of history?" (Linder, 2010, p. 2). In various ways, editors stated that history teaching should be about connecting the past with contemporary society, for example "If we want to understand how Sweden became Sweden we have to be able to place people and events in the correct chronological order from the 1100s and onwards."

In conservative national newspaper *SvD*, an editorial highlighted that Romans, Vikings and Crusaders were to be excluded from the new Syllabus, along with a number of important people in Swedish history, such as Ansgar and Magnus Ladulås.¹⁰ Instead, according to P.J. Anders Linder, fuzzy modern history perspectives and theories of power were included, writing "You can call this many things, but it's not a school which is based on education knowledge' ['Bildung']" (Linder, 2010, p. 2).

In the conservative regional newspaper *Nya Wermlands tidningen*, the editorial claimed that the Syllabus would damage students' understanding of the present time and context. The cradle of Western civilization is located in antiquity. The migration period and the Middle Ages are also important in the historical development. "Sweden became Sweden" during this period, was the message of the editorial article, titled "Even the ancient Greeks" ('Redan de gamla grekerna' (Editorial), 2010).¹¹

Generally speaking, and as can be seen from the examples provided above, commentators' starting point was that the proposed Syllabus presented a threat that Swedish school students would not be taught about the traditionally regarded origins of its nations, and the link to present times would therefore also not be present, resulting in a loss of important cultural and religious heritage. The assumption was that students would not acquire a set of common (national) symbolic tools in order to understand the surrounding world that included common European (read, ancient Greek) heritage must also be part of these symbolic tools.

'The Cuba Missile Crisis, the Berlin Wall and the Gulag?' Disciplinary and postmodern approaches in the debate

Most of the media reports included above were published in mid-February, while the response to the critique launched appeared somewhat later. Above all, the authors of the Syllabus took time to respond to the arguments lodged regarding the historical content included in the curriculum document. The response made was in the form of comments on previous debate articles rather than as rebuttals of Björklund or Harrison.

Those who defended the Syllabus stated using either explicit or mitigated language that a changed world demanded a changed curriculum. A nationally-oriented curriculum would be problematic in the contemporary era of globalization and migration. Reasons made included

the loss of an homogenous national identity and that it was no longer able to be assumed or unambiguous with Western values undergoing questioning. Supporters of the Syllabus had written articles, research reports and books for pre-service teacher education on these themes (Nordgren, 2006), expressing some basic assumptions about history as a school subject.

The first assumption was that choices need to be made when teaching; history curriculum cannot possibly include everything. A selection enables students to immerse themselves in the subject and topics. History at school must have a connection to contemporary society. According to Sverker Sörlin, professor of the history of ideas, such a connection means that it is possible to develop in-depth knowledge, writing “knowledge requires deepening”, in the arts section of *Dagens Nyheter* (Sörlin, 2010, p. B4.). In 2009, Sörlin had argued similarly in the article *Whose history?*, at which time he developed thoughts expressed by the historian David Ludvigsson (2009). A new Syllabus, it was argued, should include modern perspectives such as tolerance, democracy, equality, and environmental history. He also highlighted that school must prepare students for a globalized world, stating that complex identities are a reality in this world (Sörlin, 2009, p. B4). A similar approach was adopted by other commentators, for example, in the liberal regional newspaper *Sydsvenska Dagbladet* (SSD) Henrik Bredberg asked in an editorial comment:

Should Sweden contend itself with schools that pour forth pupils who have drifted off away from boulder-ridges and lists of kings but who have never got to the post-war period to realize the relevance of concepts such as the Cuba crisis, the Berlin Wall and Gulag? (Bredberg, 2010, p. A4).

“Not everything can be done in history lessons” was the heading of the rejoinder (published almost two weeks after Harrison’s article) from Eliasson and Nordgren (2010, p. A5), the authors of the Syllabus. The authors emphasized the importance of contemporary understanding and the perspective of analyzing uses of history which, along with skills, constituted their basic approach to the Syllabus, asserting:

Progression in conceptual understanding and working with the interpretation of source material show that history is a skills topic, instead of an orientation topic. (Eliasson & Nordgren, 2010, p. 5)

The authors also highlighted the importance of modern history in education in other contexts. In an interview for Swedish Radio, Eliasson clearly stated that contemporary understanding was meant to be the focus of the Syllabus (Svanelid, 2010).

The German historical teaching tradition has greatly influenced Swedish scholars in the field. In this tradition the main purpose of teaching history is to develop the student’s narrative competence and historical consciousness. The student’s own questions (and experience) are important. Teaching history can help students develop their competence to interpret the past and to use this interpretation for future scenarios (Rüsen, 2004; 2011). There is less focus on so-called eternal values in history and the selection principle is connected to a present understanding of history. In the article “What history is worth knowing?”, Eliasson wrote “The selection principle has been to choose the history that gives greater contemporary understanding” (Eliasson, 2010). The overall aim of the syllabus draft that started the debate included this perspective as well (Skolverket, 2010, p. 41). The proponents of the Syllabus raised issues concerning both the importance of developing generic skills and time orientation. In his article, Eliasson also raised the importance of intercultural perspectives present in the Syllabus. The Syllabus draft that Eliasson contributed to and supervised included aims that support a critical and reflexive approach. The students should for example, “Critically examine and evaluate sources as a basis for creating historical knowledge” (Skolverket remiss, 2010, pp. 41-42).

The authors of the Syllabus did not explicitly relate their perspective on history to a disciplinary or postmodern approach in articles responding to criticisms. However, in relation

to Seixas' conceptualization there is an obvious connection between the draft and a disciplinary as well as a postmodern approach (see also Parkes' 2013 discussion of Lgr 11 and postmodernism). The proposal for the new Syllabus and the authors' defence emphasized several aspects that were opposed to the view subsequently established in the collective memory approach. Not including ancient Greece in the Syllabus could have been the authors' way to signal their critical stance on the Eurocentric view of the historical narrative.

A nation-centric turn? Conclusions and discussion

Berger & Conrad (2015) show that a methodological nationalism has made a comeback in historiography. After a background position, the ambition to highlight national aspects in historiography has heightened. Interest in national and historical meta narratives has increased at the expense of a borderless world and universal values. History Wars as a phenomenon can be understood in relation to this general trend in historiography. According to Taylor & Guyver (2010), and Éthier & Lefrançois (2012), for example, the struggle over history in school can be seen as a culture war about national identity, in which politicians interfere with curricula that they consider not to be sufficiently instilling the nation's tradition onto students. The Swedish debate was also influenced as politicians, academics, and social commentators pointed to the omission of central national aspects in the proposed new curriculum. This debate can also be related to the general development of historiography.

The debate was possibly somewhat less intense than in other countries, such as in Estonia, for example, where the question of how World War II was to be remembered led to widespread anger in the Russian minority community (Potapenko, 2010). At the same time, however, the debate about history as a school subject has long been the focus of leading politicians and, arguably, the responsible minister built his political career by focusing on history as a central identity subject in the early 2000s (Björklund, 2001, p. 2).

The Swedish debate was not concerned with the interpretation of isolated important events or the representation of ethnic groups in the Syllabus. According to some researchers, this is because Sweden has been a relatively homogeneous country with a long standing tradition of consensus culture (Zander, 2001). There might be some truth in such conclusions, but it is worth noting that it was only the social studies topics that were publicly debated in connection with the new curriculum. In sum, the proposals were criticized because the curriculum did not include the nation's geography and the nation's Christian heritage (Greider, 2010; Andrén, Cullhed, Rystedt, Österberg, et al. 2010; Österberg, 2010).

It is still very important for social commentators, politicians, and scholars in Sweden and the rest of the world to take a stand on subjects that concern the past of the nation and contemporary identity. Several North American studies indicate this; for example Osborne, points out that a common critique of curricula is that "Canadian history no longer tells a coherent national story aimed at giving Canadians a sense of national identity and strengthening national unity" (Osborne, 2003, p. 594). Similarly in Australia, politicians have launched criticisms of history education and even actively tried to influence the curricular content (Taylor, 2012; Parkes, 2007).

In the Swedish debate, the question of national identity was connected to a coherent Swedish history and the Christian tradition. Critics asserted that the new curriculum erased connections both to the ancient Western heritage and the Christian tradition. An important difference between the debate about Swedish history and other history and culture wars is that even those who articulated the sharpest critique of the Syllabus proposal indirectly accepted that Sweden was a multicultural society where several different perspectives should be included in national history. The debate also reflects an almost global Western trend, in

which advocating a national collective memory approach is combined with control of the school through accountability (VanSledright, 2011; Evans, 2012; Stearns, 2010). In Sweden, Björklund is the foremost representative of this perspective. The desire for more canon and antiquity in the curriculum thus went hand in hand with a school system characterized by accountability.

What kind of history should be taught in school?

The collective memory approach was a central perspective in the debate about which history should be taught in schools. History education should contribute to national identity, social cohesion and citizenship, but according to the critics, students' socialization into a Western and Swedish heritage was threatened in the draft. This view of history education can be related to a long tradition in history teaching (Englund, 1986; Seixas, 2000; Sødning Jensen, 1978). There were similar trends in the debate of the curricula of other social studies subjects such as religious studies, where presuppositions of links between history, Christianity and national identity were evident (Österberg, 2010). There was, in other words, an implicit assimilation and socialization agenda.

The additional collective memory approach to history in school, already broached in this article, was also represented in the debate. Dunn (2000) and Nordgren (2006) also discuss how pluralistic perspective on history in a multicultural context can lead to an additional perspective. There was still a distinct idea of Swedish origin in antiquity. But by studying a variety of cultures students can learn skills to handle a modern, globalized, and multicultural world. A main concern is that absence of early history and negligence of different cultures could lead to racism and chauvinism.

In the *public debate*, it appeared that the purpose of history (and religious studies) in schools was mainly to link the past with contemporary society. Ancient Greece and the Middle Ages were frequently seen as the key eras of a common past. As a result of the debates, one change was the explicit inclusion of antiquity as well as the inclusion of the concept education [*bildung*] in the overall aim of the subject. As shown above, this is part of a back-to-basics movement for which the civilisation myth of the Western tradition is crucial (Gorbahn, 2011). Though, throughout the entire post-war period, the weakened status of ancient Greece in the Syllabus had been criticized by academics and school teachers alike. Antiquity and the Middle Ages were described as some of the essential components of Western cultural traditions. It has been argued that students who are ignorant of the ancient cultural heritage risk having a faulty and incomplete understanding of many of the self-evident symbols and traditions that Sweden have inherited from antiquity; the important connection between democracy and antiquity was one of the topics thus emphasized (Almenius, 1974; Hallenius, 2011; Zander, 2001). According to the authors of the Syllabus and its supporters, the overall aim of teaching history was not to impart a specific historical content. Rather, history teaching should develop students' own historical consciousness in a multicultural society with a recognition that students' present conditions and questions are important. New times demand *new narratives*, as Professor Sörlin put it (Sörlin, 2009, p. B4).

The authors of the Syllabus and some other debaters did not explicitly relate their perspectives on history to a disciplinary or postmodern approach. In relation to Seixas' conceptualization (2000; 2007), though, there are obvious signs of a disciplinary and a postmodern approach in the Syllabus.

However, it is clear that the debate had an impact on the final version of the Syllabus, with changes made to explicitly include the ancient period. Teaching, as the final document reads, should include "Antiquity: its main features as epoch and its importance to our present time"

(Lgr 11, p. 176). The final version of the Syllabus is a compromise. The core content shows a rather narrow nationalist and Western perspective, but at the same time the Syllabus has maintained an intercultural perspective on history. In sum, there are stabilizers in the educational system that both prevented the breakthrough of an excessive nationalist perspective and secured the introduction of a modern global intercultural curriculum.

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About the Author

Johan Samuelsson is a lecturer in history at the Department of Political, Historical, Religious and Cultural Studies, Karlstad University, Karlstad, Sweden. His interests centre on education history, cultural heritage and instruction and learning of history.

¹ Note that the Swedish education system differentiates between primary school (compulsory, years 1-9) and secondary school (voluntary, years 10-12).

² I will use *curriculum* to denote the overall curriculum. In Sweden the curriculum contains three parts: fundamental values and tasks of schools; overall goals and guidelines for education; and syllabi, which describe the content and goals of different subject. When I use the term *syllabus*, I refer to the specific description of a school subject.

³ Seixas points out that does not support Jenkins' 'extreme' version of postmodernism defined by the statement that 'there is no connection between our histories and the past' (Seixas, 2007: 29). See also Parkes (2013) for a relevant discussion of the Swedish syllabus and postmodernism.

⁴ At this time, Sweden was governed by a rightist coalition government for the first time in more than ten years. Previously, the Social Democrats had governed.

⁵ Note that the Swedish parliament and government decide on the overall national goals in the curricula and syllabi.

⁶ Media Archive is a national database that, among other material, supplies digitized Swedish periodicals. The digitized versions of the dailies are based on the printed versions. I have used search terms such as 'debaters', 'Lgr 11', 'antiken', 'kursplan historia', 'debatt om kursplanen i historia' [antiquity, history syllabus, debate about the history syllabus].

⁷ In Sweden, years 7–9 constitute lower-secondary education. This stage is called junior high school [högstadiet].

⁸ Compare this to Dunn's (2000), Symcox's (2002), Johansson's (2012) and Nordgren's (2006) reasoning about history teaching in a multicultural context.

⁹ See also Olsson (2010), Holmberg (2010) and *Hela världshistorien måste läras ut* [The entire world history must be taught] (2010).

¹⁰ Ansgar was the person who initiated the Christianization of Sweden in the ninth century. Ladulås was a Swedish king in the Middle Ages.

¹¹ For more examples, see for example statements from *Skaraborgs Allehanda (SLA)* 'Unthinkable to mutilate history', ('Otänkbart att stympa historien', 2010); *Smålandsposten*: 'A history without Antiquity is no history'. (Tunström, 2010).



Reasoning with and/or about sources? The use of primary sources in Flemish secondary school history education

Karel Van Nieuwenhuyse
University of Leuven, Belgium

Hanne Roose
University of Leuven, Belgium

Kaat Wils
University of Leuven, Belgium

Fien Depaepe
University of Leuven, Belgium

Lieven Verschaffel
University of Leuven, Belgium

ABSTRACT: Working with sources in secondary school history education has become a common practice over the last few decades. However, researchers have concluded that teaching practices relating to the educational use of sources cause difficulties. Teachers often only examine sources for/in relation to their content, and tend to ignore author and context information in the analysis of the source. This paper reports on an empirical study focusing on how primary sources are dealt with in Flemish secondary school history education, in which the standards only make general reference to the use of sources. It focuses on whether primary sources are used to prompt reasoning with and/or about sources, and includes an examination of both the kind of primary sources that are used, and the provided source and context information. 88 classroom history lessons in the three stages of secondary education, involving 51 teachers, were observed and analyzed. Analysis shows that primary sources play an important part in the lessons. Overall, 21% of all primary sources were used for illustration, 55% to reason with sources and thus to foster students' substantive knowledge, and 24% to reason about and thus foster students' strategic knowledge. Important differences and similarities regarding the educational use of primary sources between the three stages of secondary education are also found, and further explained and discussed.

KEYWORDS: Source Analysis; Primary Sources; Secondary School Education; History Teaching.

Introduction

Working with sources in secondary school history education has become a common practice over the last few decades. From the 1980s onwards, scholars in the field of history education started to stress the importance of the use of sources, as a means of access to the past, especially in order to foster students' historical thinking skills (Barton & Levstik, 2004; Van Drie & Van

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Boxtel, 2008). Students, it was argued, should gain an understanding of how the past is examined and interpreted, and how history is constructed through the critical analysis and interpretation of sources. Thus history education should not only provide an understanding of the past, but also focus on giving training in the skills needed to understand and examine how representations of the past are based on the interpretation of sources (Havekes et al., 2012; Wineburg et al., 2013). History education should not only be about the transfer of substantive knowledge (Lee, 1983), but should also develop students' strategic knowledge (VanSledright & Limón, 2006). According to Rouet (et al., 1996), students should be able to reason both with and about sources. Reasoning 'with' sources refers to the skills involved in selecting information from sources and using this information to support a claim about the past. Reasoning 'about' sources concerns students' skills at critically assessing the value of information, whether or not in corroboration with other sources, and the usefulness and limits of the source, recognizing the author's perspective, and analyzing what sources *do*, while taking into account the context in which the source was produced. Reasoning about sources contributes to students' understanding of history as an interpretative construction, in short to their strategic knowledge. To include reasoning about sources while reasoning with sources is important, since if the use of sources is limited solely to reasoning with sources, students might consider them to be mirrors of the past (Maggioni et al., 2009; Maggioni, 2010). Scholars in the field of history education therefore conclude that direct contact with sources is important in history education, but needs to be thoughtful, and to include reasoning about sources (Seixas, 1993; Yilmaz, 2008).

In this respect, Sam Wineburg (1991; 2001) suggests three strategies to apply when analyzing sources in the history classroom: sourcing, contextualization and corroboration. Students engage in sourcing when they take into account the author of the source, when, where, why and for whom it was produced, and the text's genre, while assessing and evaluating the source content and its potential value in answering a research question. Contextualization is an activity in which students assess sources within their broader historical and societal context. Corroboration is employed to compare multiple texts on the same event, to look for similarities and contradictions, and so to determine the reliability of texts, and to construct historical interpretations.

Starting from this theoretical framework, this paper reports on an empirical study of how sources are dealt with in secondary school history education in Flanders, the Dutch-speaking part of Belgium. We analyze to what extent students have to reason with and/or about sources. For practical reasons, the research is limited to the analysis of the use of primary sources. Primary sources are, contrary to secondary ones, sources stemming from the time period under study in the history classroom. The paper starts with a short introduction on how history is approached and what use of sources is prescribed in history education in Flanders. The second section consists of a presentation of existing international research on the use of sources in secondary school history education. This section is followed by a brief sketch of the data collection and research methodology, including a presentation of the analysis instrument that was used in this study. In the following sections, the results of the empirical study are presented and discussed.

Secondary school history education in Flanders

From the 1960s onwards, Belgium evolved from a unitary to a federal state. Education became regionalized. In 1989, it was formally devolved to the three Belgian communities (the Flemish, the French and the German-speaking community). In the new structure set out by the Flemish government in 1989 for Dutch-speaking education, history education acquired a fixed place in the basic curriculum of general, art and technical secondary education. The Flemish government

simultaneously decided that standards for each subject needed to be drawn up, setting the minimum targets to be achieved for the subject by every student. Standards were developed per stage (7th-8th grade = 1st stage, 9th-10th grade = 2nd stage, 11th-12th grade = 3rd stage). These consist of specific attainment targets and an explanatory text, called ‘basic principles’, which is more or less the same for all stages (Flemish Ministry of Education and Training, 2000a; 2000b)¹. In general, the curricular requirements between the types of secondary education do not vary much, and regarding the use of sources, they are not different at all. Therefore, in what follows, we will not distinguish between the variety of types of secondary education.

The history standards are less focused on a strict demarcation of curriculum contents than on the acquisition of skills and attitudes. Concerning the content, the standards do not prescribe any specific content matter. They prescribe that the period of Prehistory, Ancient History and Classical Antiquity (until ca 500) should be treated in the 1st stage, the *Ancien Régime* (ca 500-ca 1800) in the 2nd stage, while the 3rd stage should be devoted to the period from ca 1750 to the present. In each stage, aspects of political, economic, social and cultural history should be touched upon. The focus is on Western history, with some specific attention to the national past and the requirement to study at least one non-Western society in depth in each grade. In relation to the skills, the main aim is to make students proficient in the use of subject-specific (problem solving) methods. A fundamental part of this is the critical examination of sources (Flemish Ministry of Education and Training, 2000a).

In general, the standards attribute great importance to the use of sources, and address both reasoning with and reasoning about sources, without elaborating on them in detail. The standards distinguish four steps in dealing with sources: (1) collecting historical information material, (2) questioning historical information material, (3) historical reasoning, and (4) historical reporting. They address reasoning with sources, stating that students should be able to select information from various sources in an effective manner, in order to answer a historical research question. Reasoning about sources comes to the fore when they state that students must also be capable of approaching this information in a critical manner that also shows awareness of multiple viewpoints. In the 1st stage, students must “analyze simple historical information in a critical way, via specific questions” (Flemish Ministry of Education and Training, 2000c). In the 2nd stage, students must deduce, compare, structure, synthesize and communicate information, via questions and assignments. In the 3rd stage, students should operate on self-reliant bases. The guidelines regarding the strategic use of sources are rather vague, and do not go beyond the above-mentioned general terms. Reasoning about sources is not made concrete. The need to apply strategies such as sourcing and contextualization is not made explicit, for instance; nor are specific approaches to reasoning about sources provided. It hence seems as if the standards consider the acquisition of skills, which include the use of sources, mainly in terms of instigating student-centered and student-activating teaching methods. They encourage these methods rather than instilling the fostering of epistemological reflection about the nature of historical knowledge.

However, the way in which history teachers shape their actual classroom practice is not only determined or influenced by standards. Textbooks also play a role. Teachers tend to rely, to a greater or a lesser extent, on textbooks in preparing and giving their lessons. Boutonnet (2013), discussing research on history textbooks, concludes that these books certainly occupy an important place in teachers’ didactical choices. Based on his own research with Canadian history teachers, he concludes that the most important role they ascribe to history textbooks consists of providing visual and textual sources. This is reflected, he argues, in their practice, since the participating teachers indicate that they use the textbooks, apart from the learning text, mostly for their primary sources.

Even though no systematic research has been conducted into the way Flemish secondary school history textbooks deal with primary sources, our firm impression is that those textbooks mainly lead teachers towards an educational use in terms of reasoning with sources. Firstly, the textbooks support teachers in activating their students, by providing many sources accompanied by questions. A large majority of these questions are, however, purely content-related. Suggestions involving reasoning about sources, and hence instigating epistemological reflection, seem to be far less common. The context in which primary sources were produced is for instance rarely discussed; the name of the author and the date of the source are mentioned, without any further explanation. Furthermore, this context is almost never included in the questioning. Secondly, the strategy of corroboration is only very rarely applied. Reasoning about sources mostly comes to the fore in questions related to the application of what is called 'the historical method'. The latter, corresponding to the standards' requirement of critical analysis of historical information, concerns a fixed set of questions such as who produced the source, where and when, on which information did the author lean in making the sources, why did the author produce the source, and did the author have reasons to construct a subjective account? These questions relate to the strategy of sourcing. Their aim is to determine the reliability and impartiality of a source, or, in the words of a Flemish textbook, to determine to what extent a historical source is "reliable, impartial, complete and thus useful" (Van de Voorde, 2008, 197). In limiting the examination of sources to the above-mentioned questions, textbooks fail to encourage reflection on the concept of reliability, by showing, for instance, that subjectivity and untrustworthiness are not synonyms. Every source is to a certain extent subjective. Moreover, the reliability of a source is not inherent to the source itself, but is related to the questions one asks (Ashby, 2011; Counsell, 2011). The textbooks do not seem to touch upon the fact that the usefulness of a source depends on the research question in respect of which it is analyzed. In short, when paying explicit attention to disciplinary methodology, Flemish textbooks tend to cling to rather straightforward, so-called 'realist' approaches of historical practice rather than instilling nuanced reasoning about sources and reflection on the constructed character of history.

The above impressions are not exclusively Flemish. An important conclusion from international research is that the interpretative and constructed nature of historical knowledge is rarely explicitly dealt with in history textbooks. Instead, these often reinforce students' naïve ideas about historical knowledge and the role of sources in the construction of it (Wineburg, 1991, referring to Crismore, 1984). Especially in educational systems where the interpretative nature of historical knowledge is not an explicit part of the history curriculum, as is for instance the case in French and Catalan curricula, history textbooks hardly ever discuss the issue, and deal with sources correspondingly (Le Marec, 2011; Pagès & Santisteban, 2011; Van Nieuwenhuysse, 2016). Tutiaux-Guillon (2006) noticed the strength of the belief in French secondary history education that *the* historical truth can be reached. History textbooks, for example, present history as a finished, completed product. Scientific issues and controversies are not addressed, nor are historians and their (possibly divergent) interpretations of the past mentioned. Sources are mostly used in a lecturing-learning way of teaching, requiring little intellectual effort from students, since the answers and conclusions regarding the sources are fixed. Sources tend not to be contextualized, and are mostly examined for their content, in order to gather factual knowledge, and hence to reason with sources. Seixas (2000) also notes that historiographical openings towards students are rarely made; history is most often presented as a closed and finished product. One notable exception is English history education, wherein reasoning about sources through the study of interpretations of the past – to understand and explain how and why the past has been interpreted in different ways in the period subsequent to the period under study – became a key component of the history curriculum as early as 1991 (Chapman, 2011; Counsell, 2011). According to Haydn (2011), textbooks have undergone

significant changes since then. They now pay a lot of attention to strategic knowledge (Van Nieuwenhuyse, 2016).

Previous research on the use of sources in secondary school history education

History textbooks have not been the only subject of research into the use of sources in secondary school history education. Several researchers have examined the way in which students as well as teachers deal with sources. Wineburg (1991; 2001) and Nokes (2010) for instance find that students do not spontaneously approach sources as evidence – accounts of authors that need to be interpreted – but rather treat them as authorless collections of historical facts. They consider and read sources as pure bearers of information, which they accept uncritically. Students do not contextualize sources, hardly critique what they read, and only spontaneously reason with sources. These findings are confirmed in many other studies (Britt & Aglinskias, 2002; Hynd, 1999; Nokes et al., 2007; Nokes, 2010; Paxton, 1999; Perfetti et al., 1995; Stahl et al., 1996). While Nokes (2011) also connects the difficulty students encounter when reading primary sources to the complex language used in them and their lack of background contextual knowledge, Wineburg (1991; 2001) points to students' epistemological beliefs as the main explanation. Before students can discern the influence of an author's opinions and perspective in a source, for example, they must first realize that sources are not authorless collections of historical facts. As long as students do this, they simply overlook the fact that sources are interpretations of the past made by authors, and that these sources therefore need to be interpreted.

Maggioni (et al., 2009; 2010) further elaborates the epistemic stances of students. They spontaneously adhere to a realist or objectivist stance, in which sources are considered to be authorless mirrors of the past. Only students trained to adopt a 'criterialist stance' are aware that history is an evidence-based interpretation and construction, and that not all interpretations of sources are equally valuable. For example, multiple text activities and corroboration can help students to develop such a criterialist stance (Britt & Aglinskias, 2002; De La Paz, 2005; Nokes et al., 2007; Nokes, 2013; Reisman, 2012; Van Boxtel & Van Drie, 2012). Overall, these studies strongly suggest that textbooks and/or history teachers can play an important role in promoting students' understanding of sources, and in fostering their strategic knowledge and ability to reason about sources.

The ways in which history teachers actually use sources in daily classroom practice has been less examined. Research among student teachers and new teachers in secondary school history education (McCrum, 2013; Seixas, 1998; van Hover & Yeager, 2003a; 2003b; 2007) reveals that they do not engage much with reasoning about sources in order to disclose the constructed nature of history, but use primary sources especially to impart content-related substantive knowledge to students. Fostering students' strategic knowledge is most often not considered a primary teaching goal while using sources. Corroboration of sources as a learning strategy does not occur much either. More experienced teachers use sources mainly as an illustration or for their content, to enhance students' historical substantive knowledge (Bertram, 2008; Boutonnet, 2013; Grant & Gradwell, 2005; Magalhães, 2005; Nokes, 2010; Paxton, 1999). The application of the strategies of the historian (sourcing, corroboration, and contextualization), as Nokes et al. argue (2007), is rarely taught. Fostering strategic knowledge is not integrated in many classrooms (Nokes, 2010). This finding can certainly be connected to the research by Bertram (2008), concluding from an analysis of formal history assessment tasks in three South-African high schools, that only eleven of the total of 72 sources (15%) were fully presented or referenced, in that the learners were given the name, the occupation of the writer, the intention with which the source was produced and the date when it was produced. According to her

research, illustrative or content-related use of sources goes hand in hand with a minimal sourcing and contextualization of sources.

Another question related to the use of sources concerns the kind of sources history teachers and textbooks select for history educational practice. Research concludes that they use a mix of primary and secondary sources, although Grant and Gradwell (2005) have found in their research in two New York State middle schools that primary source texts are heavily favored. According to Magalhães (2005), Portuguese teachers use both iconographic and written sources. Kleppe (2010), in his research on Dutch history textbooks over a 30-year period (1970-2000), concludes that over the years, more photos have been included in the textbooks. Of all the photos appearing in Dutch history textbooks, half of them are examined, while the other half seem to serve as illustrations. During the 1990s, photos being accompanied by questions increased in number.

Overall, it can be concluded that teaching (and textbook) practice related to the educational use of sources causes difficulties (Barton, 2005; Nokes et al., 2007; Van Boxtel & Van Drie, 2012; VanSledright & Limon, 2006; Wineburg, 2001). Teachers often only use and examine sources in relation to their contents, ignore the interpretative and constructed nature of historical knowledge, and tend to ignore author and context information in the analysis of the source. They tend to cling to rather straightforward, realist approaches to historical practice rather than instilling historical thinking.

Research questions and method

This paper reports on an empirical study focusing on how primary sources are used in real classroom practice. (1) Are primary sources used to encourage reasoning with and/or about sources? (2) Which primary sources - visual versus textual - are used? (3) To what extent are the primary sources accompanied by source and context information? (4) Are primary sources corroborated, as an important source analysis strategy and an element contributing to reasoning both with and about sources? The innovative character of this research lies firstly in the large volume of data gathered. In other research, history assessment tasks have been analyzed (Bertram, 2008), questionnaires and interviews held (Magalhães, 2005), or observations performed on a few teachers (Grant & Gradwell, 2005). This research, however, is based on no fewer than 88 classroom observations (of full lessons of about 50 minutes) with 51 teachers. The observations were, moreover, situated in the three stages of secondary education. This constitutes a second innovative aspect of the research: it offers a broad view of practices across all three stages of secondary education.

Data collection

Eighty-eight classroom observations involving 51 teachers were collected in the academic year 2013-14: 22 in the first stage, 40 in the second stage and 26 in the third stage. The participating teachers responded positively to our request, sent to various networks of Flemish history teachers, to observe their classroom practice. In our communications with teachers, we never mentioned the purpose or viewpoint of our research. To limit the influence of individual teachers in the classroom observations, we allowed a maximum of four lessons per teacher. All observations involved full lessons, of about 50 minutes each. They were transcribed and analyzed. Twenty-two of the 51 teachers were academically trained historians, meaning that they had studied four years of history at university and completed the history teacher training program at university in an additional half or full year before they started teaching. Twenty-nine of the teachers had a three-year teaching degree at university college level, in which they

combined history with one or two other subjects. In principle, holders of bachelor's degrees can only teach history in the first and second stage of secondary education; holders of master's degrees can only teach in the second and third stage of secondary education. Of the 51 teachers, eight had one to three years of teaching experience, and the rest had more than three years. Eighty lessons were taught by teachers with more than three years of experience.

	Number	Number of lessons	Number of lessons per stage	Teaching experience
Teacher with a bachelor's degree in teaching history	29	44	1 st stage: 22 2 nd stage: 22	Max. 3 years' experience: 7 At least 4 years' experience: 22
Teacher with a master's degree in history and an academic teaching degree	22	44	2 nd stage: 18 3 th stage: 26	Max. 3 years' experience: 1 At least 4 years' experience: 21

Table 1: Overview of the teachers participating in the research

Analysis method

This research focuses on the use of primary sources in real classroom practice in the three stages of secondary school history education. As mentioned earlier, primary sources are defined as sources stemming from the period of historical study. Therefore, for example, if a textbook chapter is about the Roman Republic from 509 BC onwards, then a text from the Roman historian Livy from the first century BC is considered a primary source. In a history lesson on the Holocaust, a quotation from a book by Saul Friedländer from 1997 entitled *Nazi Germany and the Jews: The Years of Persecution, 1933-1939* (New York: HarperCollins) cannot be considered a primary source. However, if the lesson were about Holocaust memories and historiography in the post-war period, it would be a primary source.

The unit of analysis is the individual primary source used in the classroom. Based on existing literature (Nokes, 2013; Rouet et al., 1996; Van Boxtel & Van Drie, 2012; Van Nieuwenhuysse et al., 2015a; 2015b; Wineburg, 2001) on the use of sources in written history exams, in classroom practice and in history textbooks, an analytical research tool has been built. All the factors involved when dealing with primary sources are framed as categories, and codes for each category are designed. Categories were, among others, the type of sources, the kinds of contextual information provided, the educational use of the sources (in which a distinction was made between illustrative, content-related and strategic knowledge-related use), the presence of corroboration of sources, and the number of questions accompanying the source. For some examples of categories of the analytical research tool, see Appendix 1. The validity of the tool has been tested for this study by two independent raters, resulting in a strong interrater reliability (categories concerning type of source: $k=.95$; regarding presentation (sourcing and source genesis): $k=.84$; regarding use/questioning: $k=.94$). The coding of all primary sources was done in MS Excel, which allows a descriptive quantitative view to be obtained of all categories, and connections between different aspects to be identified. This does not mean, however, that our research takes an exclusively quantitative approach. Rather, a mixed method approach is applied. The categorization helps to assess the quantity of certain uses of sources, and to distinguish different types of presentation and examination of primary sources. Afterwards, the

contextualization and use of sources are further analyzed in a qualitative way. Within each category, a more detailed qualitative analysis is done, allowing to distinguish subcategories, for instance regarding the specific ways in which reasoning about sources is stimulated.

Research results

In what follows, we firstly present the number of primary sources (as well as their nature) occurring in the lessons. Afterwards, and most importantly, the results concerning the educational use of sources, including the attention paid to sourcing, contextualization and corroboration, are addressed.

Presence and nature of primary sources

Judging from the classroom observations examined in this research, working with sources is a common practice in Flemish history classes. 322 primary sources were present in the 88 classroom observations. The number of primary sources found in the lessons varied. In 22 lessons, no primary sources occurred. In 17 lessons, one primary source was found. In one lesson, no fewer than 22 primary sources were included (for an overview, see Appendix 2). The average number of primary sources present in the 88 classroom observations was 3.65. It is noticeable that the average per stage increases. At the same time, the average time spent on dealing with each source decreases, especially in the third stage.

Stage	Number of lessons	Number of primary sources	Average number of primary sources per lesson	Average time spent per primary source
1	22	41	1.8	2 minutes 51 seconds
2	40	149	3.7	2 minutes 46 seconds
3	26	132	5	1 minute 58 seconds
Total	88	322	3.65	2 minutes 27 seconds

Table 2: Number of primary sources and time spent on them, per stage

A difference was also found according to the level of education of the teachers. Teachers with a bachelor's degree used an average of 2.8 primary sources per lesson; teachers with a master's degree used an average of 4.4 primary sources per lesson.

Looking at the kind of primary sources that are used, the preponderance of visual sources is striking. No less than 71% of all primary sources (230 out of 322) were visual sources, such as photographs, paintings, drawings, (photographs of) statues, sculptures, pieces of art, and artifacts; 24% (78 out of 322) were textual sources, including excerpts from treaties, speeches, diaries, chronicles, and newspaper articles; and 5% (14 out of 322) consisted of a combination of textual and visual aspects, such as cartoons and (propaganda) posters.

The proportion between visual and textual sources in the first stage was different from that in the second and third stage. In the first stage the proportion was 1/6 textual sources versus 5/6 visual sources, while in the second and third stage it was 1/4 textual sources versus 3/4 textual

sources. This difference is partly explained by the fact that the first year of the first stage (7th grade) deals with prehistory, a period in which textual sources did not exist.

Educational use of primary sources

Primary sources were used in different ways. Before addressing the details of how they were used, it is worth examining who engaged with the sources in an active manner: the students or the teachers. Of all 322 primary sources analyzed in this research, 206 (64%) were accompanied by questions for the students, while 116 (36%) were not. This means that students were actively engaged in working with approximately two-thirds of all primary sources. In the other third, it was the teacher who explained about the primary source her/himself. This overall number hides important differences per stage. The number of primary sources accompanied by questions decreases considerably from 83% in the first stage to 66% in the second stage and 56% in the third stage.

In general, teachers tended to use a Socratic dialogue technique when examining sources, sometimes combined with an element of group or individual work. Primary sources were almost never corroborated. Only 10 of the 322 primary sources (3%) present in this research, were corroborated. An example of corroboration concerns the comparison of three medieval chronicles, providing different explanations for why the Frankish army under the guidance of Charles Martel defeated the Arab army at Poitiers in 732. Students were asked to critically compare the sources, to look for differences, and to explain them, taking into account the author of the source and when it was produced (the distance in time between the historical event, and the written account). Sometimes, sources were examined in combination with others, but without corroborating them. One example is when students were asked to deduce several consequences of the industrialization in the 19th century for the working class, from a set of different sources such as newspaper articles and photographs. The sources were examined together, but students were not asked to critically compare the sources with each other, and hence to corroborate them.

Regarding the educational use of primary sources, three main categories were distinguished during the research. Each of these will be further analyzed.

Stage	Use of sources			Total
	Illustrative	Fostering substantive knowledge (reasoning with sources)	Fostering strategic knowledge (reasoning about sources)	
1	3	19	19	41
2	40	81	28	149
3	24	78	30	132
Total	67	178	77	322

Table 3: The use of primary sources, per stage

Illustrative use of primary sources

Overall, 67 out of 322 primary sources (21%) were used as an illustration. Unsurprisingly, perhaps, of these 67 sources, 61 were visual, such as a picture of a Linear B clay tablet, a prehistoric battle axe, a statue of Confucius, a painting of Francisco Pizarro, a statue of Leopold I, the first king of Belgium, a photograph of a British Spitfire fighter aircraft during the Second World War, etc. These sources merely served as an illustration accompanying an explanation of the teacher. They were not accompanied by questions, or explained or analyzed by the teacher.

About two-thirds of the primary sources belonging to this category were not accompanied by any sourcing or contextualization information. In a number of sources, this was due to the fact that the author, the date and the place where the source was produced were not known, for instance in the case of a prehistoric artefact. For other sources, this information was known, but was not mentioned. This especially applied to photographs. It is striking that the name of the photographer was almost never mentioned; the date was sometimes mentioned. This might lead students to the idea that photos neatly and objectively reflect a past reality, rather than considering them as a subjective representation of an author, taking a picture from a specific viewpoint, at a certain time, with a specific intention, and to be published in a specific medium.

In the first stage, only 3 of the 41 (7%) primary sources were purely used as illustrations. Along with the increasing average number of primary sources per lesson throughout the stages, the number of sources, in terms of percentages, used as illustrations also increased. In the second stage, it increased to 27%, while in the third stage it was 18%.

Fostering substantive knowledge

In general, just over half of all primary sources (55%) were used solely to foster students' substantive historical knowledge, i.e. to reason *with* sources. Substantive questioning of sources was heavily geared towards an understanding of the event itself. An excerpt from the decrees of the Council of Trent (1545-1563) was mainly examined for its content: 'What were the conclusions of the Council?' A cartoon picturing the countries taking part in the London Conference of November 1830 discussing Belgian independence was accompanied by questions such as: 'Who is making the decisions during the conference? Why are Belgium and the Netherlands in chains? How can you explain each country's viewpoint on Belgian independence?' Sometimes, the questions accompanying sources also addressed aspects of continuity and change, or cause and consequence, described by Seixas and Peck (2004) as two key aspects of historical thinking. Examples here included the analysis of a print of a turnplow (asking about the changes it caused in agriculture), or a cartoon of Lenin sweeping the world clean and removing the nobility and bourgeoisie (asking about the causes of Lenin's actions, and their consequences).

Of the primary sources solely used to 'reason with', 27% were not provided with any context. 52% were accompanied by very basic source information, which would not encourage in-depth examination. This basic source information meant that, for example, the name of the author was given without any further explanation, or the date without any description of specific societal circumstances. An example of very basic source information was found in a lesson for the 12th grade on 'Belgium, a small country in a world war (1940-1944)'. The teacher presented a print by Arthur Szyk depicting German soldiers wearing a swastika armband around their right arm, and stealing food from the local population during the Second World War, and asked the following questions: 'What does the print represent? What kind of goods are they stealing?' These questions concentrated on the content of the print, and did not relate what was represented to the author's perspective, for instance. Nor did the teacher ask the students to deduce from

the print who the author could have been, or what views he might have held. This would have been very interesting, since Arthur Szyk was a Polish Jew who worked as a graphic artist, book illustrator, stage designer and caricaturist in Poland and France, and then moved to England in 1937 and to the United States in 1940. His work was characterized by strong social and political engagement. Another example was found in questions related to the headline of the American newspaper *Chicago American* of February 25, 1935, which ran as follows: 'Six million perish in Soviet famine'. The questions focused on the famine (in the Ukraine). The source of this article, the *Chicago American*, was not analyzed. This can be considered a missed opportunity, since this newspaper was an American one, and moreover, was known for its aggressive reporting. Both factors undoubtedly influenced the representation of contemporary conditions in (parts of) the Soviet Union, but this was ignored by the teacher. Such practice entails the risk, similar to what was mentioned earlier in relation to the illustrative use of photos and similar material, that students might start to consider sources as exact mirrors of the past, instead of as subjective representations that need to be critically assessed.

The lack of context information and information about the genesis of a source also hinders in-depth examination. By genesis information is meant information about the specific circumstances in which the source was shaped, for instance the concrete event as a result of which a cartoon was drawn, or the particular political and economic circumstances in which a letter was written or a speech prepared. A characteristic example is that of the Truman Doctrine, as disclosed in a speech to Congress by American President Truman on March 12, 1947. The 12th grade teacher discussing an excerpt from this speech limited his source information to the above-mentioned facts. The specific context in which Truman gave his speech was neglected, although it is important in order to fully understand and accurately analyze the speech. In February 1947, the British government had ceased helping Greece and Turkey, due to a financial crisis. Military and economic help, however, was considered necessary in the West, since communism was gaining strength in Greece, and Turkey was exposed to Soviet Russian pressure. American Secretary of State for Foreign Affairs Dean Acheson feared that, if Greece and/or Turkey chose communism, more countries would follow. The American government therefore planned to take over the British role. President Truman asked Congress to approve a budget of 400 million dollars for military and economic aid to both countries. This context makes it clear that Truman's speech was not just a speech, but included an important request, which Congress had to approve. He therefore needed to convince them, and used rhetorical strategies to do so. Without this context, however, it is difficult for a teacher to examine those strategies, for example. In the actual lesson in which the Truman speech was used, and no genesis context was provided, the examination of the source was indeed limited to its content: for example, the teacher asked which two ways of life Truman described in his speech, and which task he reserved for the United States of America.

One-fifth (21%) of the primary sources that are solely used to foster students' substantive historical knowledge were accompanied with genesis information. In the use and examination of those sources, however, nothing was done with this information. For example, one teacher dealt with propaganda in the early years of the Soviet Union under Lenin at great length. Afterwards the teacher showed a propaganda poster from 1922, yet only asked the students what they saw. The teacher did not encourage any reasoning about the specific propaganda character of the poster.

The number of sources used solely to foster students' substantive historical knowledge, in terms of percentage, tended to increase throughout the stages. In the first stage, 46% of all primary sources were used to foster substantive knowledge, in the second stage 49%, and in the third stage 59%. This development was accompanied to a certain extent with a decrease in the provision of source and context information with the primary sources. While 95% of all primary sources were contextualized in the first stage, in the second stage this number decreased to 53%.

In the third stage, 70% of all primary sources were accompanied with some source and context information. As mentioned earlier, in many cases, the information was very basic. This seemed to hinder not only in-depth examination of the source, but also reasoning about the source.

Fostering strategic knowledge (including substantive knowledge)

In our analysis, three different ways of stimulating students' reasoning about sources come to the fore: (1) teachers draw attention to the reliability and impartiality of primary sources; (2) they pay attention to the analysis of the author's perspective; and (3) they instill reflection on the significance and effects of a primary source. Below, these three subcategories are analyzed in more detail.

Stage	Strategic use of sources			Total
	<u>Examining reliability and impartiality</u>	Examining author's perspective	<u>Examining significance and effects</u>	
1	12	5	2	19
2	16	7	6	29
3	2	11	16	29
Total	30	23	24	77

Table 4: Subcategories in the strategic use of primary sources, per stage

Thirty of the 322 sources (9%) were examined using the fixed set of questions relating to the historical method as presented in history textbooks, aimed at determining whether a primary source is reliable and impartial. A good example of the application of this set of questions was found in a lesson on Charlemagne, in which excerpts were analyzed from Einhard's *Vita Karoli Magni* and from the Chronicles of the Abbey of Lorsch, by an anonymous author. Both excerpts addressed the coronation of Charlemagne, and were accompanied by some source and context information, which served as a basis for further analysis. Questions are asked about whether the author was an eye-witness of the events he described, whether he was objective or subjective, and hence whether the information was reliable or not. The conclusions were that Einhard was an eye-witness, but since he was Charlemagne's counsellor, he was subjective, so this source was not to be fully trusted. The anonymous author of the other source was not an eye-witness. He was probably a monk, but since no other information was available, the objectivity and trustworthiness of the source could not be fully judged. While the questions and the conclusions were of course legitimate and very interesting, they should, however, not have been treated as the end point of the analysis, but only as the beginning. Questions could and should have also been asked about what one could learn from the sources, what their significance was in building an account of the life of Charlemagne, and how to explain the different accounts of the authors. Furthermore, it should always be taken into account that the reliability of a source is related to the specific questions one asks.

Reasoning about sources was only initiated in the application of the fixed set of questions relating to the historical method; in the second subcategory, however, the strategic use of sources was more elaborate. 23 of the 322 primary sources (7%) were used to draw students'

attention to the fact that sources have an author who gave shape to the source with a certain intention, and/or an audience for whom the source was meant. This encouraged students to analyze and interpret the source from this perspective, instead of treating it as an objective account and a mere mirror of a past event, or limiting the analysis to the conclusion of subjectivity. Most of the primary sources used in this respect were accompanied with some source and context information. The amount of information varied. Several sources came with extensive source and context information. At other times, only a small amount of information was provided, because students were being asked to think about it themselves. An example was the group of questions accompanying a set of three primary sources about Charles Martel and the Battle of Poitiers (732), which was mentioned earlier as an example of corroboration. All sources were accompanied by some source and context information, involved in the further examination. For each of the corroborated sources – two Christian chronicles and one Arabic source – students were asked who the author was, and how and why this influenced the representation of Charles Martel and the Arabs. The same applied to a series of questions accompanying a print of the Catholic Inquisition torturing people accused of heresy. The teacher drew students' attention to the author of the print, a Protestant, and asked the students to reflect on the implications of this finding. Why would he have made this print, with what intention, and how would this have influenced the representation of the Inquisition? In this example, the source information was built upon to elaborate on the author's perspective and its influence on the specific representation. Similar questions guided an excerpt from a report by Willem Bosman, a slave trader and leading figure in the Dutch West Indian Company in the 17th century. In his report, he pictured black people as 'sly, villainous, deceptive, and only rarely trustworthy'. According to Bosman, they were 'villains, born and bred, slow, lazy and workshy'; he also characterized them as 'very carefree and dumb'. The teacher asked students to analyze this excerpt, keeping the author's position and intentions in mind (justifying the slave trade), hence at the same time fostering students' contextual historical empathy (Ashby & Lee, 1987). The teacher asked students to explain why Bosman described black people in this way, taking the specific historical context into account (the lucrative slave trade).

While analyzing the author's perspective, teachers sometimes also drew specific attention to the language an author used in the source. In the analysis of an excerpt from speeches by the fascist leaders Mussolini in Italy and Hitler in Germany, a teacher referred to the theories of the Jewish-German professor of linguistics Victor Klemperer, drawing students' attention to the fact that fascists attributed a negative connotation to democracy and a positive one to authoritarian regimes through their use of words. This teacher also analyzed the word 'fanatical' with his students, and showed them how the Nazis attributed positive significance to it. Such questions or observations, however, were exceptional. The language and rhetoric used in a text (whether a speech or another kind of textual source) were almost never the object of examination.

A third way to foster students' strategic knowledge through the use of primary sources, consists of having them reflect on the significance and effects of a source for/on the audience. This use occurred with 24 of the 322 primary sources, or 8%. Reflections on significance for and effects on an audience were mostly raised for visual sources, and photos in particular, drawing students' attention to the propaganda character of the sources, such as photos of poor and starving families in the Soviet Union, published in the Western world, or a painting (1801-1805) by Jacques-Louis David, depicting Napoleon Bonaparte sitting on a horse at the Saint-Bernard Pass (also known as *Napoleon Crossing the Alps*). In the examination of these sources, the broader societal context was included. In a few cases, students were also asked about the significance and effects of texts on an audience. This was the case, for instance, for extracts from Vergil's *Aeneid*, and a speech by Hitler during the Nuremberg rally of 1937.

Looking in general at the sources through which students' strategic knowledge was fostered, it can be noted that seventeen out of the 51 teachers used primary sources to reason about sources. Ten of these had a bachelor's degree and seven had a master's degree. All of them had at least three years of teaching experience. Taking into account the balance between teachers with a bachelor's and a master's degree (29 to 22), it seems as if the level of training did not generate a clear effect. Furthermore, differences throughout the stages occurred. It was notable that the analysis of the reliability and impartiality of sources through the application of the fixed set of questions of the historical method especially occurred in the first and second stages. In the first stage, 29% of all primary sources were used in this way. This seems logical, as it is in the first stage that the historical method needs to be taught to students, and is required by the standards. While in the second stage, some attention is still paid to this method (11% of all sources were used in this way), in the third stage, this disappears almost completely (1.5%), yet it is not really replaced by other questions oriented towards reasoning about sources.

Conclusion and discussion

This research investigated, for the three stages of secondary school history education in Flanders, the educational use of primary sources. More specifically, it examined whether they are used to encourage reasoning *with* or *about* sources. It included the examination of the kind of primary sources that are used (visual versus textual), the source and context information accompanying sources, and the extent of corroboration. Eighty-eight classroom observations, involving 51 teachers and including 322 primary sources, were analyzed. A first finding is that primary sources played an important part in the 88 classroom observations. This clearly reflects the importance the Flemish history standards attribute to the use of sources and the prominence of sources in history textbooks, and also reflects developments in history education in other countries. The vast majority of primary sources present in the 88 lessons were visual, which confirms Kleppe's finding (2010) for Dutch history textbooks. Looking at the differences between stages, it is notable that in the first stage, significantly fewer primary sources were included in the lessons, on average, than the second and third stage. On the other hand, this stage involved comparatively more visual sources, which can be related to the fact that in the 7th grade prehistory is addressed, a period in which textual sources did not exist. Another explanation might perhaps be found in the perception by teachers of young students' learning capacities. Teachers might consider visual sources to be easier to deal with for younger students than textual sources. The standards do not give any indication about this, however.

Regarding the educational use of sources, the analysis shows that, overall, 21% of all primary sources were used for illustration, 55% for reasoning with sources and hence fostering students' substantive knowledge, and 24% to foster students' strategic knowledge. This finding roughly parallels previous history educational research in Flanders, in which it was found that 70% of the teachers paid attention in their examination of sources to the interpretative and constructed nature of historical knowledge, and hence to reasoning about sources (Van Nieuwenhuysen et al. 2015a). In comparison with other international research, the finding that a quarter of all primary sources were used to stimulate reasoning about sources, is nevertheless remarkable, since it constitutes a comparatively high number. Bertram (2008) and Nokes (2010) for instance conclude that the fostering of strategic knowledge is not integrated in many classrooms. In our research, however, at least one-third of all teachers (17 out of 51) did include reasoning about sources in the use of at least one primary source. Furthermore, our research did not include the analysis of the use of secondary sources. This means that the number of teachers who also encourage reasoning about sources in general could even be higher. In line with earlier international research (McCrum, 2013; Seixas, 1998; van Hover & Yeager, 2003a; 2003b; 2007), it was found that teachers with a maximum of three years of teaching experience and

hence still in the early stages of teaching, did not engage with the constructed nature of history and with reasoning about sources. They used primary sources especially to impart content-related substantive knowledge to students.

How can we explain the comparatively significant amount of attention given by Flemish history teachers to reasoning about sources, and hence to revealing the constructed nature of historical knowledge? The Flemish history standards do encourage the use of sources, albeit not in a very disciplinary way. In the first stage, for instance, they encourage the application of the historical method, without elaborating on that very much, while in the second and third stage, students are supposed to build upon this, while dealing with sources in a more self-reliant way. The rather vague character of the standards' guidelines is also reflected with respect to the notion of corroboration, for instance. The standards only mention this in terms of 'students should be able to compare information', but do not further elaborate on this notion. This coincides with our finding that corroboration of sources was almost completely absent from our data set. A similar observation can be made about the strategies of sourcing and contextualization, which are not explicitly mentioned in the standards. We found that two-thirds of all primary sources were provided with some source information. Most of this 'sourcing' information, however, appeared to be very basic, and lacked sufficient explanation. Information about the genesis of sources was provided in around 20% of all primary sources in each stage. The standards' failure to make an explicit connection between source and context information on the one hand and educational use on the other hand is clearly reflected in our research. In the analysis of sources, the source and context information is in many cases not related to the critical analysis of the source. This often results in a use of the source, merely as an illustration, or limited to reason with. On the other hand, the finding remains that a significant amount of attention is given by Flemish history teachers to reasoning about sources. This shows that several history teachers in Flanders are acquainted with the constructed nature of historical knowledge, and apparently consider it important to at least occasionally touch upon it in their classroom practice. They might be encouraged, in doing so, by history teachers' continuing professional development initiatives in Flanders. For during the last decade, many of these initiatives have paid a lot of attention to concrete teaching strategies oriented towards fostering students' strategic knowledge.

The above-mentioned practices relating to sourcing, contextualization and educational use of sources do not just reflect the standards. The influence of history textbooks can be discerned here as well. For, as mentioned earlier, Flemish textbooks offer many sources and accompanying questions, yet they often only provide some basic source information (mostly author and date), and do not further contextualize them. Most of the questions are purely content-related and hence oriented towards reasoning with sources. Such questions are certainly legitimate, but, as scholars in the field of history education emphasize, it is also important to pay attention to the source itself, and what it does or does not do – in short to also reason about sources (VanSledright & Limón, 2006). In order to develop a criterialist stance (Maggioni et al., 2009; Maggioni, 2010), students need to understand that sources are never a mirror of the past, are always biased, are not a collection of facts, and never provide a complete and objective account of a past event. In this respect, it is absolutely necessary to include the source and context information in the analysis and examination of the source, either by providing this information in advance or by including it in reflective questions addressing its influence on the representation of the source. For the most part, however, Flemish history textbooks tend to cling to realist approaches of historical practice rather than perspectivist ones.

Regarding the educational use of primary sources, we found several differences between the three stages of secondary education, especially between the first stage and the two other. Firstly, fewer primary sources occur in the first stage; secondly, the average time spent on them in the lesson is higher; thirdly, students are more actively engaged in analyzing them, meaning that

sources are more accompanied by questions, in the first stage; fourthly, compared with each other in terms of percentages, sources are used more to foster students' strategic knowledge in the first stage. The examination of the reliability and impartiality of primary sources especially occurs in the first stage, in line with the Flemish history standards, requiring that teachers teach the students to apply the historical method, via a set of specific questions. In this respect, it needs to be noted that history is not treated as a separate subject until secondary education in Flanders. In primary education, it is part of a larger subject called 'world orientation', to which other disciplines such as geography and biology belong too. The use of sources is hence only addressed in general terms here: pupils must be able to consult sources according to their level. They should also be able to distinguish fact from opinion. As a result, only from the first stage of secondary education on can a profound instructional process of learning how to deal with primary sources in history be developed. In order to do this, teachers select a small number of primary sources, which they subsequently explore and investigate extensively, together with their students. The focus in the first stage really is on whether a primary source is reliable and impartial. Questions seldom go beyond those notions.

One might perhaps have expected that reasoning about sources would have been elaborated on and taught more extensively in the subsequent second and third stages, especially since from the second stage onwards, teachers might have (second stage) and certainly have (third stage) a master's degree in history. A master's degree is of course not conclusive evidence of superior competence, but on the other hand it signifies teachers who are more likely to be acquainted with historical research and the use of sources. However, such further elaboration of and attention to reasoning about sources occurs only rarely. The analysis shows an increase in the number of primary sources present in the lessons, but a decrease in reasoning about sources: from 46% of all sources in the first stage, to 19% in the second and 23% in the third stage. Given the finding that in the second, and certainly in the third stage, more sources are used, but less time is spent on them, and less questions are asked about them, it seems as if, contrary to the standards' requirements, history education becomes more teacher-centered instead of student-centered (and stimulating self-reliance). This can be connected to the intention of many Flemish history teachers, especially of those holding a master's degree and hence teaching in the second and third stage, to pursue a 'complete' overview of history in terms of historical content. Although the standards do not prescribe this, Flemish history teachers indeed nevertheless tend to give priority to providing such a 'complete' historical overview as it is presented in most textbooks. For, even though the time periods to be treated grow shorter from the first to the third stage, the textbooks become significantly more extensive. Teachers aiming to treat the complete textbook and fostering students' substantive knowledge, hence lack time to reason intensively about sources and foster students' strategic knowledge.

Another possible explanation, apart from the vagueness of the history standards with regard to reasoning about sources, might be that teachers have the idea that students have already learnt how to deal with sources in the first stage. Teachers perhaps assume (as the example of the propaganda poster from 1922 might indicate) that students automatically reason about a source they are provided with, and therefore spend much less time on analyzing them, and do not explicitly examine them in a strategic way. Thus they may be convinced that they can focus on content through an almost exclusively substantive use of a larger number of primary sources. Then again, by contrast, some teachers may assume that the acquisition of strategic knowledge, beyond determining whether a source is reliable and impartial, is too difficult for students (Moisan, 2010), and this perception may explain why they avoid addressing this area in the history class. However, existing research does not support these assumptions. On the one hand, research shows that a sustained effort is required to bring students to a criticalist stance in which they go beyond their naïve ideas of sources as mirrors of the past, and start considering them as interpretations that need to be critically analyzed (Nokes, 2010; 2011). On the other

hand, research shows that such perseverance can indeed bring students to a criterialist stance (Britt & Aglinskas, 2002; De La Paz, 2005; Nokes et al., 2007; Nokes, 2013; Reisman, 2012; Van Boxtel & Van Drie, 2012). It is not an easy job, yet it is certainly not an impossible one either.

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Appendix 1: Extracts from some categories of the analytical research tool used during this research

CATEGORY 1: TYPE OF SOURCE

1. Textual source
2. Visual source
3. Combination
4. Other

CATEGORY 2: CONTEXT INFORMATION ACCOMPANYING THE SOURCE

1. None
2. Context information is provided
3. Context information is included in the source itself
4. Context information is not provided, because it is asked for in the questions
5. Context information is partly provided, and partly asked for
6. Context information is partly provided, and partly included in the source itself
7. Context information is partly included in the source itself, and partly asked for
8. Context information is partly provided, partly asked for, and partly included in the source itself

CATEGORY 3: TYPE OF CONTEXT INFORMATION PROVIDED

1. Sourcing (author and/or date and/or place)
2. Genesis
3. Sourcing and genesis

CATEGORY 4: USE OF THE SOURCE

1. Purely illustrative
2. Content-related (reasoning with sources)
3. Strategic knowledge-related (reasoning about sources)
- ... (combinations)

CATEGORY 5: CORROBORATION OF SOURCES

1. Yes, with another primary source
2. Yes, with a secondary source
3. No

CATEGORY 6: NUMBER OF QUESTIONS ACCOMPANYING THE SOURCE

- 0 = 0
1 = 1
2 = 2
...

CATEGORY 7: ...

Appendix 2: Number of primary sources appearing in the 88 classroom observations, per lesson

Number of primary sources used in one lesson	Number of lessons in which X primary sources appear
0	22
1	17
2	8
3	4
4	4
5	4
6	10
7	4
8	4
9	2
10	4
11	2
12	2
22	1
Total	88

About the Authors

Karel Van Nieuwenhuysse* is since 2013 assistant professor in History Didactics, in the Faculty of Arts, University of Leuven, Belgium. His main research interests related to history education are the position of the present, the use of sources, students' historical narratives and the connection with their identification, and historical representations of the colonial past.

Hanne Roose was research assistant in History Didactics, in the Faculty of Arts, University of Leuven, Belgium. She currently teaches history in secondary school education, and is teaching assistant in the history department, University of Brussels, Belgium.

Kaat Wils is is professor in European cultural history and head of the Research Group Cultural History since 1750 at the University of Leuven, Belgium. Her research fields include contemporary historical culture, the history of history education and the history of 19th and 20th century scientific and intellectual culture.

Fien Depaepe is since 2013 assistant professor in educational sciences at the KU Leuven, Center for Instructional Psychology and Technology. Her research deals with cognitive (e.g. content knowledge, pedagogical content knowledge, general pedagogical knowledge) and affective factors (e.g. beliefs, attitudes) that influence teaching and learning different disciplines.

Lieven Verschaffel obtained in 1984 the degree of Doctor in Educational Sciences at the University of Leuven, Belgium. Since 2000 he is a full professor in educational sciences of that same university, with a main interest educational psychology and more particularly learning and teaching in specific domains such as mathematics, languages, history, and music.

* Corresponding Author Email: karel.vannieuwenhuysse@kuleuven.be

Endnotes

¹ Based on the official attainment targets, the different educational networks in Flanders further design their own curriculum. Because this would take us into too much detail, we pay no further attention to the different curricula in this article, even though we included this distinction in our research.



Stimulating historical thinking in a classroom discussion: The role of the teacher

Harry Havekes

Radboud University Nijmegen, The Netherlands

Carla van Boxtel

University of Amsterdam, The Netherlands

Peter-Arno Coppen

Radboud University Nijmegen, The Netherlands

Johan Luttenberg

Radboud University Nijmegen, The Netherlands

ABSTRACT: In this article we describe strategies history teachers use to guide student historical thinking in a classroom discussion. We focus on three challenges for the teacher: a) exploring several possible answers; b) stimulating the use of specialized language; c) thinking about the quality of answers. We analysed the prompts of the teachers on general guiding (such as problematizing the remarks of the student) and on guiding historical thinking, to which we refer as components of knowing and doing history. We identify that teachers use three strategies: (1) broadening student thinking by focusing on knowing history; (2) deepening student thinking by focusing on doing history; (3) enhancing student thinking by integrating knowing and doing history. We show that teachers do not stick with one of these strategies but that they choose a strategy that gives students the best chance of taking the next step in historical thinking.

KEYWORDS: Historical thinking, contextualisation, classroom discussion, teacher strategies.

Introduction

Many students find it difficult to master domains with a horizontal knowledge structure, such as history. Domains with horizontal knowledge structures have few systematic organising principles and the use and meaning of the domain-related concepts and procedures are context dependent (Bernstein, 1999). This implies that there is not one fixed way to come up with the correct answer. Moreover, domains with a horizontal knowledge structure do not have a single correct answer, but they have several reasonable possibilities, depending on the perspective taken. Consequently, learning to think historically differs from task to task, and students have to explore several possible answers (instead of looking for the single correct answer), using the specialised language at a substantive and procedural level. On top of this they have to find criteria to evaluate an argument in order to assess the quality of their answers. This complex thinking does not emerge automatically (Wineburg, 2001) but needs to

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be carefully guided by a history teacher. Consequently, a history teacher guiding student historical thinking, for example during classroom discussion, has to make sure that students focus on: a) searching for several possible answers, instead of looking for a single correct answer; b) using specialised language at a substantive and procedural level; c) discussing the criteria by which to evaluate the quality of argument.

When a teacher stimulates the search for more possible answers, students actually ask them: 'Please tell us, what do we have to write down?'. If the teacher responds that several answers are possible, depending on the quality of argument or the perspective taken, some students may get confused and think that any answer is valid, as long as you have some sort of argument. They do not comprehend that substantive and procedural knowledge is required for good domain-specific reasoning, and that correct use of this knowledge is context dependent in a domain with a horizontal knowledge structure (Bernstein, 1999). It is therefore not enough for the teacher to stimulate the search for more possible answers (VanSledright, 2002), they must also guide the use of specialised language and discuss the criteria with which to judge the given answers.

Student answers also reveal that they often do not possess the necessary substantive knowledge to construct an answer (Van Boxtel & Van Drie, 2004, 2013). They tend to describe historical events, phenomena or developments with everyday language. When students do use domain-specific concepts, this is often a kind of 'name-dropping' without solid knowledge of the nuances of a particular context. This can lead to sloppy reasoning, which needs to be addressed by the teacher to stimulate historical thinking.

When constructing answers, students often have no indication of the procedures needed for solid domain-specific reasoning. In historical thinking the so called second-order concepts¹, such as cause and change, play an important role in describing relationships between historical facts, figures, concepts and the specific historical context. Students find it difficult to use these second-order concepts properly (Lee, 2005). Their answers therefore often lack both the proper use of domain-specific concepts and of second-order concepts (Lee & Shemilt, 2009). A teacher must also focus student thinking on using second-order concepts so as to relate the substantive knowledge in a relevant way for this specific context.

Finally, the criteria for integrating substantive and procedural knowledge are context dependent in a domain with a horizontal knowledge structure. There are no fixed rules or guided step-by-step plans with which students can assess a consideration in order to come up with the most reasonable answer. This gives students little grasp of how to evaluate answers. A teacher therefore must also guide thinking on the quality of the answers for each specific context by focusing on the relationship between, and the integration of, the domain-specific concepts, everyday language and second-order concepts.

In an earlier study we developed design principles for historical tasks in order to address these learning problems (Havekes, 2012). Two odd-one-out tasks, focusing on constructing a historical context of change around 1500, were developed based on three design principles: 1) creating a cognitive incongruity; 2) stimulating substantiated considerations; and 3) scaffolding student learning. Analyses of how students worked on the tasks (Havekes, Luttenberg, Coppen, & Van Boxtel, 2014) show that initial steps in historical reasoning are stimulated by the task, but that they do not solve all problems. The idea of one correct answer remains particularly strong; the minimal use of domain-specific concepts as part of the specialised language and difficulty in evaluating the answers remain. It seems obvious that the teacher has an important role in further guiding the students in their historical reasoning during the classroom discussion following the task. Little research has been done on strategies used by teachers to guide historical thinking during a classroom discussion (Van Boxtel & Van Drie, 2013; Van Drie & Van Boxtel, 2011). The main research question of this article is:

How do teachers stimulate domain-specific thinking in history, as a domain with a horizontal knowledge structure, during a classroom discussion after students have worked on a task on historical contextualisation?

To answer this question we will focus on the three challenges the teacher faces when guiding student historical thinking during classroom discussion. How does a history teacher focus on:

- (a) exploring several possible answers?
- (b) stimulating the use of the specialised language of the domain?
- (c) thinking about the quality of answers?

Theoretical framework

Guiding historical thinking in a classroom discussion is challenging for a teacher, as domains with a horizontal knowledge structure are ill-structured (Bernstein, 1999) and there are no well-defined procedures. Students have not mastered specialised language and have difficulty evaluating the quality of answers. These problems involve components of substantive (knowing history) and procedural (doing history) knowledge, as well as the epistemic ideas of students (Havekes, Coppen, Luttenberg, & Van Boxtel, 2012). To stimulate and guide student historical thinking, a teacher has to address all these components and epistemic ideas. A teacher has to find strategies during classroom discussion, addressing learning problems and prior knowledge of the students on the one hand, and disciplinary demands on the other hand. We will describe relevant insights into what teachers can do to guide productive thinking (Engle & Conant, 2002), to enhance knowledge building (Scott, Mortimer, & Ametller, 2011) and how they relate to relevant components of knowing and doing history (Havekes, et al., 2012).

In the vast amount of literature on classroom interaction, the research of Engle and Conant (2002) and Scott, Mortimer and Ametller (2011) is useful, as they provide theoretical insights and useful tools for analysing the prompts of the teachers. Engle and Conant (2002) have characterised productive disciplinary engagement as an intellectual interaction concerning the issues and practices of a discipline (as relevant for a school setting). This disciplinary productivity can involve relatively simple tasks such as recognising factual knowledge or concepts, but can also involve making connections between ideas or solving domain-specific problems. They emphasise that ‘what constitutes productivity depends on the discipline, the specific task and topic, and where students are when they begin addressing a problem’ (p. 403). This relates to the aforementioned challenge of the teacher in guiding a classroom discussion to find strategies fitting the learning problems and prior knowledge of the students, and the disciplinary demands.

Scott et al. (2011) have described pedagogical link-making “as the ways in which teachers and students make connections between ideas in the ongoing meaning-making interaction of classroom teaching and learning” (p. 3). This basic constructivist idea indicates that the teacher has to guide student learning not by pouring knowledge over the students, but by guiding the construction of new knowledge by relating these new ideas to the existing knowledge of the students. Scott et al. (2011, p. 4) add that “in this way learning or meaning-making is regarded as being an essentially dialogic process, which involves bringing together and working on ideas”. This links to the challenge that teachers have to connect with the prior knowledge of the students while, at same time, integrating new insights into the interaction, without profiling themselves as the domain-expert with long historical exegesis.

This literature also provided tools with which teachers can address the guidance of domain-specific thinking during a classroom discussion. Engle and Conant (2002) identified four guiding principles for productive disciplinary engagement. In a single classroom discussion two of these four principles are relevant as they concentrate on productive disciplinary thinking: a) problematising and b) disciplinary accountability. The third guiding principle, giving authority to the students, is less relevant in the present study as it concentrates on the engagement of the students during their talk. The fourth guiding principle, providing relevant sources, functions at a different level: it is interwoven with the other three principles. In this study we consider the prompts of the teachers to be relevant sources. The questions and feedback that the teacher brings into the interaction are meant to stimulate the historical thinking of the students. It is the main source for further thinking by the students. This is why we will not use 'providing relevant sources' as a separate analytical element.

The first guiding principle, problematising, is defined as stimulating students to come up with alternative reasonable answers or to elaborate on given answers. Instead of just collecting facts, concepts and arguments and letting students bring forward ideas, teachers have to challenge these answers (Engle & Conant, 2002). In this sense problematising is divergent. These divergent prompts are important in a domain with a horizontal knowledge structure, because there are more reasonable answers that stand next to each other and these challenge each other without necessarily leading to a single correct answer. Students tend to look for a single correct answer. A teacher should therefore ask students to come up with alternative answers, and stimulate elaboration of these answers. Elaborating on an answer can be necessary if a student uses everyday language instead of the specialised language. The teacher can ask the students to come up with the domain-related concept or the teacher can provide it and ask the students to use it.

The second guiding principle, disciplinary accountability is connected to problematizing, as it also asks students to elaborate on answers, but its focus is convergent. Disciplinary accountability focuses on the necessary demands of domain-specific thinking relevant in a classroom situation (Engle & Conant, 2002). The answers of the student should make use of facts and concepts, and should also relate these facts and concepts to each other in a domain-specific way. The teacher can challenge an answer, if the answer merely consists of facts and concepts without any relationship. When they are asked to integrate procedural knowledge in an answer by using second-order concepts such as cause and change, students are stimulated to come up with more coherent answers, as the facts and concepts are connected through domain-specific relationships. In this way disciplinary accountability helps students to relate facts and concepts to relevant phenomena and helps students to construct valid historical answers.

In their analyses of pedagogical link-making, Scott et al. (2011) differentiate between three forms: support knowledge building, promoting continuity and encouraging emotional engagement. Supporting knowledge building is of interest in this study as it focuses on "making connections between different kinds of knowledge to support students in developing a deep understanding of subject matter" (Scott, et al., 2011, p. 5). They also describe several approaches to support this knowledge building. Three of them address two of the learning problems in this study: learning the specialised language and thinking of the quality of answers.

The approaches that address the learning of specialised language are: a) differentiating between everyday use of concepts and domain-specific use of concepts; and b) making relationships between these concepts, as they do not appear by themselves, but only in relation to other concepts. In a classroom discussion this can mean that teachers ask students to describe historical concepts in more detail when they have the feeling that a student does

not comprehend the concept very well. Where students do not use historical concepts, teachers should ask them to integrate relevant historical concepts in their answers. Stimulating the use of second-order concepts like cause, change and simultaneity, helps students to relate the facts and concepts to the historical context and phenomena at hand. Teachers can do this by asking questions to activate prior knowledge, so students come up with the concept themselves, or alternatively teachers can suggest the proper historical concept and ask students how it relates to the answer they have given. In both cases teachers help student thinking on a substantive level.

The third approach, scaling of explanations, addresses learning the specialised language and the evaluation of answers. The scaling of explanations refers to ‘fluently juggling’ with substantive and procedural knowledge. This scaling can be done on a substantive level, when the teacher addresses another scale but remains focused on substantive knowledge. For example: an answer discusses one historical phenomenon (e.g. reformation). The teacher can ask students to relate this phenomenon to other phenomena (renaissance and discoveries) that occur at more or less at the same time, in order to construct a more sophisticated historical context for the changes around 1500. Although focusing on substantive knowledge, the teacher stimulates students to integrate second-order concepts such as simultaneity and change to construct a more sophisticated historical context, using the specialised language in a more sophisticated fashion.

Scaling can also be done on a more abstract and procedural level, by asking what elements in the answer are important for a valid domain-specific argumentation. Scott et al. emphasise that domain specific thinking involves moving between explanations, some of which are not directly visible to the student. A teacher might focus student attention on the role of facts and concepts in domain-specific reasoning, or on the role of second-order concepts such as cause, change or simultaneity. This kind of scaling gives opportunities to discuss the criteria for assessing the quality of an answer, thus giving students more hold on evaluating answers in a domain-specific way.

These guiding principles and the approaches of Engle and Conant, and Scott et al. do not yet define historical thinking. This present study uses a task involving historical contextualisation as an example of historical thinking. Havekes et al. (2012) identified components that need to be addressed when students try to construct a historical context. These elements are: use of facts (who, what, when, where), use of historical concepts, and use of colligatory concepts, as part of the substantive knowledge and asking questions, using sources, using second-order concepts (e.g. time, change, cause, simultaneity) and argumentation as part of the procedural knowledge. They refer to this as knowing and doing history.

To support historical thinking a teacher should combine the guiding principles and approaches mentioned by Engle and Conant (2002), and Scott et al. (2011) and the components of knowing and doing history. Stimulating the use of colligatory concepts is a substantive way of relating historical persons or concepts to phenomena or a historical context. Asking students to integrate second-order concepts such as cause or change, helps students to define a historical context in greater detail. Asking for these relationships helps the students put forward more than just facts and concepts, and stimulates them to integrate components of knowing and doing history.

Little research has been done into how teachers try to address these guiding principles and approaches and how they try to integrate them with domain specific components, in a domain with a horizontal knowledge structure. In teaching history the focus has been on conceptual change (e.g. Limon, 2002), on students working with sources (e.g. Nokes, Dole, & Hacker, 2007; Reisman, 2012; VanSledright & Kelly, 1998; Wineburg, 1998), and on causal

reasoning by students (e.g. Monte-Sano, 2011; Pontecorvo & Girardet, 1993; Stoel, Van Drie, & Van Boxtel, 2014). Research into how history teachers stimulate thinking during classroom discussion is scarce. Van Drie and Van Boxtel (2011) have identified the use that teachers make of the general guiding principles and approaches mentioned by Engle and Conant (2002) and Scott et al. (2011), and that these are coloured by the demands of the domain. They do not indicate how teachers try to address the learning problems of the students on the one hand and the disciplinary demands of integrating knowing and doing history on the other hand. The present study focuses on the prompts given by history teachers during a classroom discussion, after students have worked in groups on a task of historical contextualisation, to describe strategies teachers use to stimulate student historical thinking and how they try to address both the learning problems and the disciplinary demands.

Table 1 shows how the learning problems of the students on the one hand and the disciplinary demands on the other hand contrast and define the challenges for the teachers. We have related the guiding principles for the productive thinking of Engle and Conant (2002), the approaches for knowledge building of Scott et al. (2011), and the components of knowing and doing history of Havekes et al. (2012) to these learning problems and disciplinary demands. The use of these guiding principles, approaches and components of knowing and doing history help us to describe the strategies used by history teachers to stimulate historical thinking during a classroom discussion on historical contextualisation.

Learning problems of students	Teacher strategies			Disciplinary demands
	Guiding principles for productive thinking (Engle & Conant, 2002)	Approaches for knowledge building (Scott, et al., 2011)	Components of knowing & doing history (Havekes, et al., 2012)	
Looking for a single correct answer	<ul style="list-style-type: none"> • Problematising 		<ul style="list-style-type: none"> • Facts • Concepts • Argumentation 	Several possible answers stand next to each other
Using everyday language and lack of substantive and procedural knowledge		<ul style="list-style-type: none"> • Relating daily and domain-specific concepts • Relating concepts and phenomena 	<ul style="list-style-type: none"> • Facts • Concepts • Colligatory concepts • Second-order concepts 	Using specialised domain-specific language
Fixed and clear criteria of good/wrong	<ul style="list-style-type: none"> • Referring to disciplinary accountability 	<ul style="list-style-type: none"> • Scaling of explanations and concepts 	<ul style="list-style-type: none"> • Facts • Concepts • Colligatory concepts • Second-order concepts • Argumentation 	Debatable criteria for both substantive and procedural components of the answer

Table 1: Matrix relating learning problems and disciplinary demands to guiding principles for productive thinking, approaches to knowledge building and components of knowing and doing history

Method

In a multiple case analysis we will focus on the three learning challenges the teacher has to address during a classroom discussion. The first challenge is to stimulate students to search for multiple possible answers, instead of looking for a single correct answer. We will analyse how the teachers problematise the answers given by the students. The second challenge for teachers is to guide the learning of specialised language. We will analyse the way teachers stimulate the use of domain-specific concepts, instead of everyday language, and how the teachers stimulate student thinking about relationships between substantive knowledge within the disciplinary demands. The third challenge for teachers addresses thinking about the quality of answers. We will analyse how teachers converge student answers to the disciplinary demands and on how the teachers scale answers to stimulate students to fluently integrate substantive and procedural knowledge.

We have analysed two datasets from a total of seven classroom discussions about a task involving the historical contextualisation of the changes around 1500. This task consisted of three odd-one-out rows, each addressing one phenomenon (renaissance, discoveries, reformation) and two overarching questions, relating the three phenomena, focusing on the changes around 1500 and the simultaneity of their appearance (see appendices A and B). Although there are some differences in the design of the task used in datasets A and B, we do not take them into account in this study as we focus on the learning challenges for the teachers during the classroom discussion, which are not influenced by the slightly different odd-one-outs and questions of the task.

For dataset A, three classes, with a total of 59 students (27 male; 32 female), from three different schools, participated. For dataset B, four classes, with a total of 93 students (43 male; 50 female), from four different schools, took part. The students attended upper general education (aged 15-16). Five different teachers participated, varying in teaching experience from four years to more than fifteen years, and had eight to ten years of experience with odd-one-out tasks. An average classroom discussion lasted 16:15 minutes (see table 2). The classroom discussion of T4 was cut short due to the end of the lesson. Students and teacher were still discussing the last question when the lesson ended. All other discussions were finished within the normal time of the lesson.

Teacher	Classroom discussion	School	Teaching experience	Experience with the task	Students	Students	duration of classroom discussion
dataset A							
T1	A	II	3-5 years	since 2007	18		14:30 min.
T2	B	III	> 15 years	since 2002	16		17:00 min.
T3	C	I	5-10 years	since 2004	25		14:25 min.
dataset B							
T1	D	II	3-5 years	since 2007		20	18:40 min.
T2	E	IV	> 15 years	since 2002		28	15:30 min.
T4	F	I	3-5 years	since 2008		26	15:00 min.
T5	G	V	5-10 years	since 2006		19	18:15 min.
Total					59	93	
Mean							16:15 min

Table 2: Participants in, and duration of classroom discussion (dataset A and B)

These classroom discussions were videotaped and transcribed. To analyse the classroom discussions we used the guiding principles (Engle & Conant, 2002), approaches (Scott, et al., 2011) and the components of knowing and doing history (Havekes, et al., 2012). We used Atlas-ti to code every prompt given by the teacher, as this was the unit of analysis. A prompt was defined as a sequence of utterances without interruption. By giving more codes for each prompt, we analysed how the guiding principles and approaches on the one hand, and components of knowing and doing history on the other hand, were related. We developed a matrix to visualise where the prompts of the teacher coincide (see Tables 3 and 4). We found this matrix useful as it helped to characterise the prompts of the individual teachers in the different classroom discussions. To give meaning to the prompts we also determined how they fitted into the context of the ongoing discussion. This helped us to analyse how the teacher tried to stay close to the learning challenges and to address the disciplinary demands at the same time.

Based on literature and further grounded in the data itself, we developed criteria for each guiding principle or approach (see appendix C). In this way we could agree upon a set of criteria for the codes. The criteria for the code problematising was similar to that of Engle and

Conant's (2002) findings, indicating that the teacher encourages students to give several answers and to challenge these answers of the students. These challenges should direct student thinking in a disciplinary way, however, sometimes the teacher did not direct the answer of the student in any way, but still made sure that the student elaborated on their first answer. We coded these prompts as 'only-problematizing'.

Teacher	Classroom discussion	Challenges for the teacher						Total prompts	
		Exploring answers		Specialised language		Quality of answers			
		Problematizing -only	Problematizing	Concepts- phenomena	Relating everyday language to	Disciplinary accountability	Scaling		
T1	A	Knowing & doing history	8						
		Second order concepts		0	1	1	0	0	
		Argumentation		3	0	1	0	0	
		Facts		8	8	7	0	0	
		Concept		3	3	3	0	0	
		Colligatory concepts		3	1	3	0	0	
		<i>subtotal A</i>	8	17	13	15	0	0	53
T2	B	Second order concepts		3	1	1	2	2	
		Argumentation		8	3	4	8	7	
		Facts		12	3	7	2	6	
		Concept		2	2	1	2	3	
		Colligatory concepts		5	0	3	1	2	
				<i>subtotal B</i>	25	30	9	16	15
T3	C	Second order concepts		10	2	4	2	0	
		Argumentation		31	6	12	8	0	
		Facts		39	14	22	4	0	
		Concept		13	9	10	3	0	
		Colligatory concepts		9	1	11	3	0	
				<i>subtotal C</i>	22	102	32	59	20
T1	D	Second order concepts		3	2	1	0	0	
		Argumentation		5	0	1	0	0	
		Facts		7	0	2	0	0	
		Concept		10	2	5	0	0	
		Colligatory concepts		2	0	0	0	0	
				<i>subtotal D</i>	18	27	4	9	0
T2	E	Second order concepts		6	1	3	3	3	
		Argumentation		6	0	0	4	3	
		Facts		7	0	0	6	4	
		Concept		5	1	1	2	2	
		Colligatory concepts		2	1	1	1	0	
				<i>subtotal E</i>	1	26	3	5	16
T4	F	Second order concepts		2	0	3	0	0	
		Argumentation		9	0	0	0	0	
		Facts		20	4	5	0	0	
		Concept		14	6	0	0	0	
		Colligatory concepts		0	0	1	0	0	
				<i>subtotal F</i>	21	45	10	9	0
T5	G	Second order concepts		0	0	0	0	0	
		Argumentation		14	0	0	0	0	
		Facts		16	1	1	0	0	
		Concept		17	1	1	0	0	
		Colligatory concepts		2	0	0	0	0	
				<i>subtotal G</i>	20	49	2	2	0
Total		<i>f</i>	115	296	73	115	51	32	
		<i>M</i>	16.4	42.3	10.4	16.4	7.3	4.6	
		<i>SD</i>	8.0	26.5	9.6	18.0	8.5	7.5	

Table 3: Frequency of the prompts in seven classroom discussions, categorised in the three challenges for the teacher and components of knowing and doing history

Scott et al. (2011) provided a criterion for relating daily and domain-specific concepts, indicating that a teacher can support knowledge building by asking to use domain-specific

concepts, by asking to explain these concepts in everyday language, or by giving new factual knowledge. The second criterion Scott et al. provided was the focus on the relationships between the concepts, persons or the phenomena. Scott et al. indicate that concepts never stand alone, but are fitted together in an interlinking system and are applied through other concepts. In history these relationships are often described through the use of second-order concepts, such as change, cause and simultaneity. We combined the insights of Engle and Conant (2002) and Scott et al. (2011) for the criteria on disciplinary accountability and scaling. This could be done on a substantive level, when a teacher initiates thinking from one phenomenon to more phenomena. A teacher can also scale from only substantial knowledge to integrating substantial and procedural knowledge, or scale to a more disciplinary meta level to address why several answers need to be discussed.

Our criteria for the codes for disciplinary demands of historical thinking are based on the insights of Havekes et al. (2012). The facts (what, who, when, where) give information about the past, but are in themselves not yet related. Guiding historical thinking should do more than just collect facts. Colligatory concepts are needed, for instance to relate the facts on a substantive level. Second-order concepts are needed to relate the facts and concepts in a disciplinary way. The following second-order concepts are of special interest when constructing a historical context: time (simultaneity), cause and change.

We use descriptive statistics to present the use of the different codes. For every classroom discussion we will describe the frequency of the prompts per category and will give subtotals for each classroom discussion. For the totals we will give the frequency, the mean and the standard deviation (see Table 3). This will give us insight into both how often a category occurred, and the differences between the classroom discussions. We will then elaborate on this use by going back to our data and characterising significant categories of the classroom discussion through qualitative analyses.

We also characterised every whole episode of the discussion. An episode was defined as the talk about one question in the task. Renshaw and Brown (2007) have emphasised the need to study the form and structure of a talk to study how the co-construction of knowledge is done in a classroom discussion. Focussing only on the prompts does not give an indication of the form and structure of the talk. Studying the whole episode will give insight into the form and structure in which the prompts manifest themselves.

Based on the research of Mercer and Nystand, Havekes et al. (2014) described four types of student talk when collaborating in small groups, using the criteria co-constructing and discussing multiple perspectives, which are relevant for the present study. Each classroom discussion involved five questions and therefore we coded five episodes (see table 4). The first talk is termed transmissive, as there was little or no collaboration and only one perspective was discussed. The teacher handed down information directly to the students and the few remarks of students did not or barely influenced the response of the teacher. All three other talks used responsive questioning (Chin, 2006) and thus tried to use the remarks of the students in the interaction. The second talk was the cumulative talk. The teacher and the students discuss one answer together and the teacher ends with a sort of conclusion which includes the remarks of the students. Often, after discussing one answer this way, another answer is brought forward and dealt with in the same way. The answers however are never brought together. In the third talk, the disputational talk, students bring forward multiple ideas. The answers of the students remain autonomous and are not related to each other. The teacher hears students remarks, but refrains from giving an opinion and refrains from directing the answers to a specific content or higher level. In the fourth talk, the transformational talk, the teacher and the students discuss several answers together. In this

talk the different answers brought forward are related to each other, for instance by comparison or by combining them, in order to come up with new ideas and conclusions.

All these analyses were performed by the main researcher of this study. During weekly encounters with a second researcher these analyses were discussed, challenged and re-adjusted. Two other researchers acted as debriefers, by challenging the criteria and asking for examples. During the final coding, there were some minor differences when the remarks of the teacher were interwoven with non-task utterances, such as class management issues, or when a prompt was very long and included several elements. These differences were then discussed until consistent consensus between the researchers was acquired.

Results

We present our results through descriptive statistics. We order them by discussing the three challenges for teachers in more detail, by giving examples derived from our data and performing additional qualitative analyses. We will indicate whether the results were found in all or most classroom discussions, or only in one or two.

The first challenge refers to the way teachers explore several answers by problematising in a domain-specific way. Table 3 shows that in all discussions this is the most common of all codes, especially if we add the code problematising-only, which is often used to stimulate students to continue talking or thinking. These problematising-only prompts were often very short, such as: ‘yes’ or ‘because’ or ‘please tell’ or ‘That is an interesting point, go on’. As mentioned, these problematising-only codes were used to stimulate students to continue talking and thinking in a general way. If we return to the category of problematising and look at how this was done in a domain-specific way, it becomes clear that the focus is mostly on knowing history (facts, concepts, colligatory concepts). The component fact was problematized particularly often. For example: ‘They are reformers. And what did they want to reform?’ or ‘Yes, he has discovered America. What about the others?’. The second largest is the category of argumentation, for example: ‘Okay, so the changing portrayal of mankind and the worldview is stimulated through the discoveries and the renaissance. Okay. Does anybody have an addition? Can somebody give an example?’ or ‘So they serve as a motto for the way of living. Can you explain what you mean by that?’ Overall it appears that problematising prompts focus more on knowing history than on doing history.

The second challenge for the teacher involves learning the specialised language. It refers to how teachers stimulate domain-specific substantive and procedural knowledge. Table 3 shows that all teachers paid attention to learning the specialised language. Stimulating the use of the domain-specific language instead of using every day language was particularly done often (115). Overall these prompts focus almost twice as much on knowing history as on doing history. Returning to our data, we note that in all classroom discussions the episodes on the explorers are mostly responsible for this focus, especially on facts and concepts. During the preceding group work it had already become clear that the students did not have adequate substantive knowledge (see also: Havekes, et al., 2014). One teacher explicitly mentioned factual information about each explorer, while the other teachers briefly mentioned this information and partly tried to activate prior knowledge by collaborative thinking, for example: ‘Yes, he discovered America. What about the others? What did Vasco da Gama do? [student answers]. Yes very good. En Diaz, why is he famous?’

To stimulate the use of the specialised language teachers often rephrased or paraphrased answers using everyday words and domain-related concepts at the same time, for example: ‘Yes, yes, so Calvin put emphasis on... you can say, the faith of the individual, very good, and Luther and Erasmus gave it more.... gave the king or the church a more important role. The

higher authority, the sovereign had to decide the faith of the people. Very good. Yes, other answers? This example also shows that, although the teacher evaluates this answer as a good one, more possible answers need to be explored, as they finished with an invitation for more alternatives.

Constructing relationships between the phenomena in this specific historical context is another part of learning the specialised language. We note that all classroom discussions paid attention to this. In general the prompts focused more than three times as much on knowing history as on doing history. When focussing on knowing history the teacher often asks students to construct relationships between facts and concepts and a specific phenomenon. In the following example the teacher wants the students to relate the actors to the phenomenon of the reformation: *'Very good. They thought that things happened in the church that will not pass. And then they react differently to it. Erasmus wants changes, but wants to stay within the church. What about Luther and Calvin?'* Three of the seven classroom discussions paid attention to colligatory concepts, but only once in each discussion. The other four discussions did not use colligatory concepts as a way to construct relationships in a domain-specific way. If this was done, the focus was on using the correct colligatory concept, for instance in this example the concept of renaissance: *'Humanism... and, and... what concept lays above it? What is a more general concept? [...] What do we call it, what do we call the overarching concept that is mentioned as a key-concept in the textbook? It is not Humanism'*.

Five classroom discussions focussed on doing history and only discussions B and C focussed several times on doing history. In the following example the teacher focused on the second-order concept *cause* and also on relating two phenomena (renaissance and discoveries): *'That the earth was round. Good. Does this fit... Does this relate, this changing worldview caused by the discoveries, does it also have to do with the first odd-one-out in the renaissance?'* The following example illustrates how a teacher invites students to come up with a better argument by focussing on possible relationships in the answer: *'Why are they especially interested in classical antiquity if they started to think logically?'* A third example illustrates the need to look for similarities in the odd-one-out sets, thus coming up with substantiated answers within the phenomenon, such as these discoveries: *'Columbus is the odd-one-out, because, if I summarise Koen, the other three did not try to find their way to India, going west. Bartolomeo Diaz could be the odd-one-out, because... who knows a possible answer, because the other three... What do the other three have in common, differentiating them from Bartolomeo Diaz?'*

The third learning challenge involves thinking about the quality of the answers. Few prompts focused on disciplinary accountability and even fewer on the scaling of explanations. Table 3 also shows that only discussions B, C and E considered this challenge. In fact all prompts scaling student answers are from a single teacher (T2), who did this in both his classroom discussions. Prompts on disciplinary accountability were also given by this same teacher (T2) and one other teacher (T3). In the few cases that a discussion focused on this challenge, we noted a more equal ratio between knowing and doing history. This contrasts with the other two challenges, where the focus was more on knowing history.

Prompts stimulating thought about the quality of answers were often rather long. The teacher often paraphrased several given answers and then invited students to think about these answers at another level or use these given answers to construct a more sophisticated conclusion. This could be set at the level of disciplinary demands or can be related to school discipline if the teacher discusses what good answers in a written test may look like: *'[...] I think your answer gives a good summary of it all. What you are doing is constructing a chain of facts and causes, bringing it all together. [...], what we have done is use historical persons and concepts, because now we are talking about how you can construct such an argument.'*

[...] We have seen mainly causes and consequences. So if you have to relate three persons or concepts, it might be useful to use one of these concepts: what are causes? Or, what consequences? Or what is the relation between these people? Or what changes or developments symbolize these persons or concepts? Because, now you are doing something with the domain of history. Not so much with the content of history, the discoveries, but mainly with historical thinking. So if you have a question in a written test about what it means, about the relationship, you should actually use these kinds of words'. A great deal comes together in this prompt, but as noted, these kinds of prompts appeared rarely.

We also coded the type of talk for a complete episode to determine whether teachers stimulated student thinking in a constructivist way and to place the prompts in the context of the talk (see table 4).

	Classroom discussion								Total
	A	B	C	D	E	F	G		
Teacher	T1	T2	T3	T1	T2	T4	T5		
Transmissive talk	1			1		1			3
Cumulative talk	2	1	2	3	2	4	4		18
Disputational talk	2		2	1			1		6
Transformational talk		4	1		3				8
Total	5	5	5	5	5	5	5		35

N= 35 (episodes)

Table 4: Frequencies of types of talk in each classroom discussion

We will first look at how the episodes are opened, because this is important for the form and direction of the talk. To stimulate collaboration and the exchange of ideas, all teachers started the discussion in an open manner by asking students to come up with a possible answer: *'Okay boys and girls. I believe that most of you have finished the task. So let's start discussing your answers. So, for every odd-one-out there are several possibilities and I think the argument that you use to choose the odd-one-out is important. Erm... the first one, memento mori, carpe diem, uomo universalis and classical heritage. Who..?'* Teachers also made it explicit that several answers were possible and that there is no single correct answer: *'[...] Let's see what you came up with and as I said before, it is of course not the idea to come up with the correct answer. Your argumentation is what matters'*.

Three episodes were coded as transmissive talks, showing a classical initiation-response-evaluation pattern, with a rather long prompt from the teacher at the end, without involving the remark of the student. These three episodes were the only talks to explore just one possible answer.

The majority of the episodes were coded as cumulative (18). Our data shows that all these episodes discussed several possible answers, one after the other, not simultaneously. Each discussion finishes with a conclusion by the teacher, in which the remarks of the students are included. An example of closing the discussion on a possible answer during a cumulative talk was described above when we discussed the results of stimulating the specialised language: *'[...] The higher authority, the sovereign had to decide the faith of the people. Very good. Other answers?.'*² In another discussion the teacher continued discussing the answer of a student, using several prompts to problematise the answer, and ended with: *'Yes, very good. So Erasmus indeed wanted to prevent the church from dividing. Luther and Calvin on the other hand did not object to dividing the church'*.

We coded six episodes as disputational, which means that multiple ideas are brought forward but that these answers remain autonomous and are not related to each other. In

contrast with cumulative episodes, where a conclusion ends each answers, these disputational episodes do not end with some sort of conclusion. The same teacher as above finished another episode like this: *‘Okay, Okay... Anybody else?’* When nobody reacted, the teacher went on to the next question without further ado. The use of ‘okay’ in this prompt is very neutral, just leading the conversation. The answers are simply listed and not discussed or assessed in any way.

Table 4 shows that eight episodes are coded as transformational, but also that only in classrooms B and E did this occur regularly, and in classroom C only once. In most classrooms this type of talk did not occur. It needs to be noted that these discussions are led by the same teachers (T2 and T3) that stimulated thinking about the quality of the answers. The long quote we used above to describe this thinking about the quality of answers, is a good example of closing a transformational talk. The teacher paraphrases the answers of students, brings together several answers and uses words like ‘we’. The example focuses on doing history, but in transformational talks the focus can also be on knowing history. An example from another teacher illustrates this: *‘So we can say that it depends on your question or your perspective if a concept is the odd-one-out. Classical heritage can be the odd-one-out if you are looking for mottos or Latin expressions, but if you consider which concepts are important to explain the renaissance, memento mori becomes the odd-one-out. [...]’*. These talks indicate possible answers as the teacher makes the criteria for thinking about the quality of the answers explicit, but leaves it up to the students to draw final conclusions, thus stimulating the co-construction of new knowledge. In these prompts knowing and doing history are more or less equally present, implicitly indicating that this is needed for sophisticated historical thinking.

Conclusion and discussion

We will now present our conclusions and discuss them in light of challenges for the teacher, then we will come back to our main research question and draw some final conclusions.

The first challenge for the teacher is to explore several possible answers with the students. This was done through continually problematising student remarks. To do this teachers used the design principles of creating a cognitive incongruity and stimulating the substantiated arguments of the task (Havekes, et al., 2012). Problematising, whether focusing on knowing or doing history, helped in discussing more perspectives and in broadening or deepening the answers given. This is in line with the findings of Van Drie and Van Boxtel (2011), who presented examples of the way teachers broadened or deepened historical reasoning in a whole-class discussion. If the focus remains on knowing history, which is often the case, the thinking of students is broadened in the sense that more facts, persons and concepts are introduced, explained and related at a substantive level. If the focus is on doing history, student thinking is deepened, because more components of historical thinking are involved in the argument. Constructing relationships is done through second-order concepts, such as change and cause. Only if problematising involves an explicit focus on integrating knowing and doing history, is student thinking extended towards more elaborate historical thinking by using and debating both domain-specific substantive and procedural knowledge to construct historical context. Only one teacher integrated knowing and doing history explicitly, when he problematized by discussing the criteria for the evaluation of an answer.

Results show that all episodes, except the three transmissive talks, explored several possible answers. If we look at all classroom discussions, we note that all teachers emphasised the need for multiple answers, and this was often made explicit at the start of the classroom discussion. The reason that several answers needed to be discussed was often implicit,

however. It is not clear whether the teachers explored several answers because the design of the task stimulated it or because of the disciplinary demands. The teachers therefore might be more task-orientated than domain-orientated. If teachers are indeed more task orientated, then it seems that they focus on the learning problems of students who are more interested in doing well at the task than in historical thinking (Newell, Beach, Smith, & VanDerHeide, 2011).

Literature suggests that teacher stances on pedagogy might also influence their behaviour. In a review Maggioni and Parkinson (2008) describe history teachers who believe that learning history is acquired through construction by using different historical heuristics and those who believe that learning history is done by bringing to life existing narratives, for example through captivating and entertaining sources that allow the ability to acquire factual knowledge. They also emphasise that history textbooks often present an unbiased narrative of events, which might enhance the epistemic belief that learning is about receiving a body of knowledge developed by experts. The task in this study however leaves little place for bringing to life existing narratives or receiving a body of knowledge. The task forces students to think of multiple possible answers and forces them to discuss them. This might however clash with the epistemic ideas of teacher who believe that learning history is done best by bringing existing narratives in a lively manner.

All classroom discussions considered the second challenge: learning specialised language. Teachers focused student attention on using domain-specific concepts and relating these concepts to the historical context. This focus became most explicit during the odd-one-out talk about the explorers. The prior knowledge of the students fell short and the teachers spent significant time activating the necessary substantive knowledge to fulfil the task. Two teachers explicitly emphasised the need for substantive knowledge in historical reasoning, when they scaled the answers of the students.

In other discussions we noted that the teachers tried to stimulate the use of colligatory concepts, such as renaissance, or 'changing portrayal of mankind and worldview'. Colligatory concepts were used as a kind of conclusion. They seem to function as a link between concepts, persons and phenomena on a substantive level. Some talks finished with this kind of broadening of students' substantive knowledge. Van Drie and Van Boxtel (2011) also noted these kinds of decisions being made by the teacher. Teachers seem to stay close to the learning problem of the students to give good opportunities to build a solid substantive knowledgebase as part of learning the specialised language. This focus on the substantive might also be motivated by the national exams in the Netherlands, in which students can earn several marks by naming and explaining historical context. Newell, Beach, Smith and VanDerHeide (2011) argue that the pressure of assessments also shapes the answers of students. Students realise that they need to produce answers that can withstand assessment by the teacher, whether during a classroom discussion or in a written test and therefore tend to come up with answers that resemble earlier experiences of good answers, often focussing on including the correct substantive knowledge. Teachers and students, both trying to stay close to what they think the other prefers, thus find themselves in a sort of vicious circle, focussing on substantive knowledge over and over again.

The third challenge, stimulating thinking about the quality of answers, was done more regularly in two discussions by the same teacher, and once in the discussion of another teacher. Few prompts focused on this learning challenge by scaling the answers to another level, but when it was done it addressed our design principle of explicitly focussing on integrating knowing and doing history (Havekes, et al., 2012). Returning to the data, we noted that the teacher who included this in both his discussions addressed the epistemic ideas of the students, making clear that criteria are needed for the valid integration of knowing and doing history, without fixed procedures. This teacher used long utterances and took charge of the

discussion: he decided to explain the required criteria for historical thinking explicitly and model correct historical thinking. In this way the teacher helped the students to become acquainted with the disciplinary demands of discussing criteria to evaluate answers, although students did not explicitly use these demands themselves. It remains unclear what effects these prompts would have on student historical thinking in the long term, although explicit teaching of skills and addressing student epistemological beliefs are considered important for becoming an expert in a particular domain (Alexander, 2005; Stoel, et al., 2014).

It remains unclear why most discussions did not focus on all three learning challenges. The first and the second were addressed, as all teachers explicitly mentioned the need to explore several answers, and during all discussions teachers paid attention to learning specialised language. The third challenge, however, was addressed regularly by only one teacher in his two discussions. Our data does not provide sufficient information to draw empirically grounded conclusions about why this might be, but we will discuss possible explanations for the choices of the teachers. We noted from the data that time was an issue in some of the discussions. When the end of the lesson was approaching, they increased the tempo. We found remarks like: '[...] *ssh... erm... We have three minutes left and in those three minutes I want you to finish the final question*'.

We have already discussed the possible influence of a teacher's epistemic ideas on learning history, and the focus on learning the substantive knowledge. The teachers in this study, however, were selected because of their experience and because they were familiar with the pedagogy *Active Historical Thinking* and the task. Despite the familiarity with the design principles of the pedagogy and the task, we still noted that these teacher paid a great deal of attention to knowing history. This might be explained by the ideas of teachers as to what students are capable of when learning history. This might also influence the reasons they focus less on doing history, and do not focus on thinking about the quality of answers. They might consider it too difficult for students, especially for the topic in the task used in this study: the historical context of the changes around, and the 'changing portrayal of mankind and worldview', cannot be described in a simple linear causal chain of origin, event and consequence. Lee (Lee, 2005; Lee & Ashby, 2000) and others have noted this as one of the problems in learning history. Lee and Howson (Lee & Howson, 2009) have also shown that a lack of substantive knowledge is a problem when students have to construct a historical context. It might therefore also be possible that the topic of the task constrains teachers in exploring the challenge of thinking about the quality of the answers.

More possible explanations are suggested by Newell et al. (2011) in their review study of teaching argumentative reading and writing. Argumentation involves a sophisticated set of practices and there is no one correct form. Teachers, so they argue, might not always know what substantive and procedural knowledge are required. This might be even more valid in domains with a horizontal knowledge structure, as they are ill-structured. On top of that, Newell et al. emphasise that teaching argumentation is often done in a formal way, using prescribed steps to come up with a correct argument. This may limit student ability to think critically about the quality of given answers. In guiding high-quality argumentation teachers might take procedural concepts, such as change and cause, for granted, and not make them available and useful for the students in this particular task as part of discussing the quality of answers. Newell et al. also bring forward another possible problem meaning that teachers try to avoid discussions about the quality of answers. They note the accepted idea that teachers must try to maintain a conflict-free zone when it comes to learning. Starting a discussion about the quality of the answers given might disrupt this conflict-free zone, especially as there are no fixed rules for establishing the correct answer.

Answering our main question about how teachers stimulate domain-specific thinking in a domain with a horizontal knowledge structure, like history, during a classroom discussion on debriefing a task involving historical contextualisation, we can conclude that teachers use three kind of strategies to support domain specific thinking: 1) broadening student thinking by stimulating the use of substantive knowledge, placing an emphasis on knowing history; 2) deepening student thinking by focusing on procedural knowledge, placing an emphasis on doing history; and 3) enhancing student thinking by integrating knowing and doing history.

In the first strategy, broadening student thinking, multiple answers are explored and the focus remains on facts, persons and concepts. The substantive knowledge of the students is broadened through prompts asking them to describe or elaborate facts, historical persons and concepts. This is triggered by the nature of the task in which the three odd-one-out tasks ask for substantive knowledge. This focus on substantive knowledge remains close to the epistemic ideas of the students, who often have a copier or borrower stance at this age (Havekes, et al., 2012; Maggioni, VanSledright, & Alexander, 2009). In these stances they focus on knowing history, as they believe that presenting facts which are more or less related is the essence of reconstructing the past and doing history. Broadening student historical thinking this way is a first step, but scholars on learning history agree that this is not enough (Barton & Levstik, 2004; Davies, 2011; Lee, 2005; Levstik & Barton, 2005; Limon, 2002; Monte-Sano, 2011; Reisman, 2012; Van Boxtel & Van Drie, 2004; Van Drie & Van Boxtel, 2008; VanSledright, 2010; Wineburg, 2001).

The second strategy, deepening student thinking, explores, as all strategies do, multiple answers. The focus shifts to doing history, as the teacher emphasises the need for good argumentation and the use of second-order concepts like *change*, *cause* and *simultaneity* to construct relationships between the facts, persons and concepts. Student thinking is deepened because relating facts, persons and concepts now involves components of doing history. It helps students develop their epistemic beliefs, as they learn that valid domain-related argumentation is based on components of doing history, such as using second-order concepts. This strategy remains close to the epistemic ideas of students in the borrower stance, in which students believe a final reconstruction is possible if all facts and sources are available, but, as not all information from the past is preserved, students realise that several constructions of the past are possible as long as you make valid arguments for it. Deepening student historical thinking this way runs the risk that students might think that anything goes in history, because they do not yet recognise that valid constructions in a domain with a horizontal knowledge structure are restricted by domain-specific procedures, which are context dependent.

The third strategy, enhancing student historical thinking, integrates knowing and doing history. Facts and concepts are not only broadened on a substantive level or deepened by relating them through second-order concepts, but the teacher explicitly scales to a more meta-cognitive level, in which the criteria for a valid historical argument are discussed. This explicit focus helps students to become acquainted with the context dependent procedures of the domain and shows them that factual knowledge and concepts need to be addressed in a historical way so as to construct historical reasoning that can withstand critical debate. This focus also shows that a sophisticated epistemic stance, the criterialist stance, is needed. It shows them that knowing and doing history need to be integrated, using domain and context specific criteria.

It needs to be noted that the use of the third strategy, enhancing students' historical thinking by integrating knowing and doing history, was explicitly engaged by only one teacher in two classroom discussions. This teacher was the most experienced teacher in this study and had also been involved in developing the pedagogy of *Active Historical Thinking*

from the beginning. It might also be that the other teachers believed it was too difficult for students. We have also suggested that the Dutch system of assessment might be of influence.

It needs to be noted that teachers do not stick with just one of these strategies. In the discussion of one answer the focus might be on deepening substantive knowledge, while in the discussion of another answer, the focus might be on broadening or enhancing student knowledge. Consideration of time issues, epistemic ideas about learning history, the specific topic and the nature of the task might also be an influence here. Further study should focus on the relationship between the chosen strategies, types of discussion and the considerations of the teachers about this choice.

The strategies, although far from definitive, might enhance teacher awareness of the necessary focus during a classroom discussion to stimulate the domain-specific thinking of students. Further research is needed to relate the behaviour of the teachers to their pedagogical content knowledge, so that the strategies can be useful in a variety of domains with a horizontal knowledge structure.

It can be argued that in a domain with a horizontal knowledge structure, the guiding principles for disciplinary thinking (Engle & Conant, 2002) and the approaches to knowledge building (Scott, et al., 2011), are not enough to stimulate historical thinking in themselves. These tools give a general focus, but do not yet determine the domain-specific aim needed for historical thinking. Components of knowing and doing history (Havekes, et al., 2012) need to be involved in the prompts of the teacher. The ill-structured character of history, however, gives little support to the teacher about which components are relevant at a specific moment. When choosing a strategy, teachers seem to find it important to broaden the substantive knowledge of the student, as a knowledge base. They seem to have the idea that students must know a lot of factual and conceptual knowledge, before they can go on to use this knowledge in domain-specific procedural ways. Learning history in secondary school might be seen as a first step towards a more sophisticated, more disciplinary way of historical thinking. If this is the case, the focus in designing tasks and in preparing classroom discussions should be on the design principle of explicitly integrating knowing and doing history (Havekes, et al., 2012). Design-based research should investigate how this integration can be stimulated. Is the first step indeed building a knowledge base and then using it, or can this be done at the same time? How do the epistemic ideas of teachers, about how students learn to think historically, influence pedagogies and determine teacher behaviour?

In this study we did not address all components of knowing and doing history, as they were not relevant in this particular task. Future research should study these strategies with other tasks and in another contexts, so that more light can be shed on both the context-dependency of stimulating historical thinking and on the characteristics that are less context-dependent that may be useful in other domains with a horizontal knowledge structure.

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Appendix A

First version - Dataset A

Odd-One-Out: The time of Explorers and Reformers

Names: _____ and _____

Nr. camera: _____

Your task

- Work in dyads
- You may **not** use your textbook or notes.
- Below you will find three lines with concepts or persons.
- Choose, in every line, one concept or person that is the odd-one-out.
- Explain what the other concepts or persons have in common.

1.	<u>memento mori</u>	carpe diem	<u>uomo universalis</u>	classical heritage
2.	Christopher Columbus	Bartolomeo Diaz	Vasco da Gama	Willem <u>Barentz</u> .
3.	Erasmus	Luther	Calvin	

1. _____ is the odd-one-out, because the other three _____

2. _____ is the odd-one-out, because the other three _____

3. _____ is the odd-one-out, because the other two _____

Question

A) A lot changed around 1500. Can you, using the concepts and persons above, describe what the change consisted of?

B) Can you give an explanation why many of the developments about 1500 occured in a (relative) short period of time?

Appendix B

Second version - Dataset B

Odd-One-Out: The time of Explorers and Reformers

Names: _____ and _____

Nr. camera: _____

Your task

- Work in dyads
- You may **not** use your textbook or notes.
- Below you will find three lines with concepts or persons.
- In each line you will twice choose a concept or person that is the odd-one-out.
 - Mind: You can choose the same concept or person twice, but then you have to give another argument.
 - Then you have to choose which one of these two is the final odd-one-out.
- In conclusion you have to answer the two questions on the back.
 - We will end the assignment with a whole classroom discussion.

1. reminder of mortality	seize the day	polymath	classical heritage
2. Christopher Columbus	Bartolomeo Diaz	Vasco da Gama	Willem Barentz.
3. Erasmus	Luther	Calvin	

1. _____ is the odd-one-out, because the other three _____

_____ is the odd-one-out, because the other three _____

2. _____ is the odd-one-out, because the other three _____

_____ is the odd-one-out, because the other three _____

3. _____ is the odd-one-out, because the other three _____

_____ is the odd-one-out, because the other three _____

Questions

Answer these questions after choosing the odd-one-outs above.

A) A lot changed in the era of 1500. Describe this change for (each of) the odd-one-outs.

Row 1: _____

Row 2: _____

Row 3: _____

B) The changes you described in question A occur in a relatively short period. What is the relationship between these changes, through which they occur at more or less the same time?

If you have finished everything, you can wait for a moment. The odd-one-outs and the questions will be discussed with the whole class.

About the Authors

Harry Havekes is a teacher educator of history and art history in the Radboud Teachers Academy, Radboud University Nijmegen, the Netherlands. His research focusses on how students learn and how pedagogies can stimulate historical thinking. His teaching for novice (art)history teaching and refreshment courses for expert (art)history teachers uses the pedagogy of Active Historical Thinking as a base for history teaching.

Carla van Boxtel is a professor of History Education in the Research Institute of Child Development and Education & the Amsterdam School of Historical Studies of the University of Amsterdam, the Netherlands. She also gives lead to the Dutch Centre of Social Studies Education. Her research focuses on the learning and teaching of history. I published on historical reasoning, the learning of historical concepts, heritage education and the potential of collaborative learning in small groups and whole-class discussions.

Peter Arno Coppén is a professor of Professional didactics and school subject development on language, culture and history in the Radboud Teachers Academy, Radboud University Nijmegen, the Netherlands. He publishes on domain-specific language and the use of language in general. He is a columnist for several Dutch journals and papers on language. His research focusses the use of language in society and in schools subjects.

Johan Luttenberg has recently retired from his job as a teacher educator for philosophy in the Radboud Teachers Academy, Radboud University Nijmegen, the Netherlands. His expertise is the normative professional identity of teachers in secondary education.

* Corresponding Author Email: h.havekes@docentenacademie.ru.nl

Endnotes

¹ These concepts are sometimes also called ‘meta-concepts’. We think that ‘meta-concepts’ and ‘second-order concepts’ are interchangeable and we will use the term ‘second-order concepts’ in this article.

² For the complete prompt, see [example specialized language](#).



Deepening historical consciousness through museum fieldwork: Implications for community-based history education

Cynthia Dawn Wallace-Casey

University of New Brunswick (Fredericton), Canada

"It's not just my teacher, it's the truth! It's in my history book!"

A.J. Soprano. (Chase, 2002)

Dissertation Abstract

This case study explores the link between historical thinking and historical consciousness at middle school level. Over a 14-week unit of study, one entire class of seventh-grade students (n=24), along with a group of adult community history museum volunteers (n=5), engaged in historical thinking with a museum collection in New Brunswick (Canada). Regarding historical thinking, the inquiry focused upon historical narratives, evidence, and sources—since these concepts are often encountered within informal learning settings such as community history museums. Indirectly, the concept of historical significance was also relevant.

Drawing from an episode of a fictional television series, I first set the stage for my research by illustrating the fragile process through which a young person might construct meaning from the past. In the fourth season of *The Sopranos* (Chase, 2002), Anthony Soprano Junior ("A.J.") sits in the kitchen of the family home, reading aloud to his mother. The topic of discussion is Christopher Columbus, and the reading source is Howard Zinn's revisionist publication *A Peoples' History of the United States: 1492 to Present* (1980). When the family patriarch "Tony" Soprano enters the scene, we are provided with a brief glimpse into their family dynamics. As the breakfast discussion proceeds, A.J.'s father becomes extremely agitated, as he realizes that his son's version of history challenges his own well-established beliefs about the "brave Italian explorer." "Your teacher said that?" he asks his son, to which A.J. replies: "It's not just my teacher, it's the truth! It's in my history book!" Such a scenario, although fictional, provides an excellent illustration of the learning dynamics that can exist both inside and outside of a classroom. In this instance, as the student struggles to understand Christopher Columbus, he must juggle conflicting interpretations, both past and present, as well as weigh available evidence, in search of his own perception of *truth*: Was Columbus a criminal or a hero? Is his father right? Is his teacher right? Is the history book right? Wherein lays the *truth*?

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The problem, as illustrated by this fictional scene, is that A.J. may never find the *truth* about Christopher Columbus. At best, according to theorist Jörn Rüsen, he may reach a contextual perception of the life and times of the explorer, recognizing that times have changed, and drawing personal meaning that is relevant to the present as well as the future. At worse, he may simply choose to accept his father's well-established beliefs about the "brave Italian explorer"—or his history teacher's criminal interpretation—as an unquestionable obligation to perpetuate a particular belief system. Likewise, as A.J.'s father struggles with generational differences between what he was taught in school about Christopher Columbus, and what his son is currently learning in his classroom, we are presented with a metaphorical question as to whether A.J.'s father, in light of his son's revisionist thinking, might be capable of changing his own well-established beliefs about his "hero." Inevitably, in the Soprano household the heavy hand of *truth* is dealt by the father, as the scene concludes with these weighty words: "He discovered America, is what he did. He was a brave Italian explorer. And in this house Christopher Columbus is a hero. End of story" (Chase, 2002). This is how I have framed my research problem.

Research design

The methodology adopted for this inquiry was informed by a sociocultural perspective. As a result, research procedures were framed around Falk and Dierking's (2000, 2013) *Contextual Model of Learning*, as well as Rüsen's (1987; 1993; 2004) typology of historical consciousness. The ultimate intent was to map out any changes that may have occurred over time regarding participants' relationship with their past, present, and future. This perspective seemed most fitting for the inquiry, since one of the greatest challenges associated with developing a research design for a community history museum often rests with identifying learning. As Wertsch (2002) has pointed out, what works well in the controlled social environment of a classroom may not produce equally valid data results in the differently-controlled social environment of a museum (see also Eakle & Dalesio, 2008; Foreman-Peck & Travers, 2013). Given such a distinction, Falk and Dierking (2000, 2013) have developed a *Contextual Model of Learning* that identifies four broad contexts for data analysis: personal, sociocultural, physical, and temporal (Allen et al., 2007, p. 229). This model has been widely used by researchers in science museums as a way of trying to make sense of how visitors learn in an informal learning setting (Allen et al., 2007; Kydd, 2005; Falk & Dierking, 2000; Anderson et al., 2007). While Falk and Dierking's model is not specific to middle school students nor community history museums per se, I considered it to be broadly applicable to my research design because it recognizes (regardless of age or discipline) that "[l]earning begins with the individual. Learning involves others. Learning takes place somewhere" (Falk & Dierking, 2002, p. 36), and learning continues over time (Falk & Dierking, 2000, p. 12). This model was also relevant to my research question, since it recognized the tacit nature of learning in a museum that manifests itself as historical consciousness.

My method choices were guided by current pedagogy surrounding historical thinking. In Canada, several notable scholars have spearheaded historical thinking as a disciplinary (domain-based) approach to history education (Clark, 2011; Duquette, 2011; Gibson, 2014; Létourneau & Moison, 2004; Lévesque, 2008, 2011; Osborne, 2006; Peck, 2009; Sandwell, 2005; Sandwell & Von Heyking, 2014; Sears, 2014; Seixas, 1996; Seixas & Morton, 2013). One of the central difficulties associated with teaching historical thinking in a history museum, however, rests with disciplinary distinctions within the domain of history. Since history museums are primarily keepers of artifacts (three-dimensional, non-literate objects), the object-based (material history) epistemology most often employed by museum curators cannot be considered the same as other approaches to historical inquiry (Corbishley, 2011,

2015; Hood, 2009; Jordanova, 2012; Létourneau, 1989; Thatcher Ulrich, 2001). Because of this distinction, I adopted a material history framework for historical inquiry (Elliot et al., 1994; Smith et al., 1985) that enabled students to *do* material history—as curators do in history museums. Such an approach required teaching students how to “read”—and critically analyze—objects for the evidence that they contained.

My method choices were also guided by distinctions between historical thinking and historical consciousness. As Duquette (2011) and others have argued (Charland, 2003; Laville, 2003; Rösen, 2005, 1993; Seixas, 2004), the phenomenon of historical consciousness is not the same as the act of historical thinking—although the two are very closely related. This is because while the latter is explicit, the former is tacit. Likewise, while historical thinking can be evaluated and assessed against specific concepts of historical inquiry, historical consciousness cannot. To this end Jörn Rösen (1987; 1993; 2004) has proposed a typology of historical consciousness that identifies four broad categories that reflect differing beliefs about the nature of historical knowledge: traditional, exemplary, critical, and genetic.

All of these factors combined ultimately led me to adopt an instrumental case study method (Creswell, 2007; Merriam, 2009; Stake, 2005) that provided opportunities to explore pragmatic applications for historical thinking and historical consciousness within a community history museum. This method choice also provided opportunities to explore the phenomenological meanings that participants drew from the lived experience of participating in a 14-week unit of study. The single-case design (Yin, 2009) was bounded by the context of time (one formal study unit), as well as by the formal arrangement of a classroom (one seventh-grade class) and a specific community history museum fieldwork experience. The case contained two embedded units of analysis: students participating in the experience of community history museum fieldwork as part of their studies ($n=24$), and adult museum volunteers participating in the same experience as facilitators ($n=$ five).

My central research question was: “How can a heritage community assist middle school students in deepening their historical consciousness?” Within this overarching question there were three procedural sub-questions:

1. Can formal classroom instruction, adopting *The Historical Thinking Project* concepts for historical thinking, enable middle school students to think historically about the narratives they encounter within their community history museum?
2. Does participation in history museum fieldwork activities deepen the historical consciousness of these students?
3. Does student collaboration with older members of this volunteer heritage community deepen the historical consciousness of the older members themselves?

Given the challenges associated with conducting research within an informal learning setting, combined with required precision associated with establishing (and adhering to) a case study protocol, it was also necessary to break my research procedures down into three distinct phases:

- **Phase one (four weeks):** Collaborating with the classroom teacher, museum executive director, and museum volunteers as preparation for the community history museum fieldwork experience; documenting participants’ entry positions regarding historical thinking and historical consciousness. Research instruments adopted for this initial phase included the *Canadians and Their Pasts* survey (Conrad et al., 2013)—administered to both adult and student participants—as well as one in-depth (open) group interview with adult participants, and student written documentation assignments.

- **Phase two (four weeks):** Documenting participants' engagement with the community history museum fieldwork experience—as active and independent learners. Research instruments adopted for this phase included student historic space mapping of the museum exhibits, as well as material history object analysis documentation, adult-student think alouds, student artifact label-writing activities, and in-depth (open) adult group interviews following each museum visit.
- **Phase three (six weeks):** Providing time for the learning to be independently re-interpreted and re-visited as a new experience. Phase three research instruments included student material history object analysis activities, as well as development of a classroom museum, and in-depth (structured) student group interviews. As a final exit activity, all participants (adults and students) were asked to again complete specific portions of the *Canadians and Their Pasts* survey (Conrad et al., 2013).

During the first two phases students visited the community history museum four times, and the museum volunteers visited their classroom four times. During the final phase students remained in their classroom, working independently of the volunteers and the museum.

In order to situate this case study within a larger Canadian context of research regarding historical consciousness, the *Canadians and Their Pasts* survey (Conrad et al., 2013) was adopted as both a before and after point of comparison. All survey data was analyzed quantitatively against the larger *Canadians and Their Pasts* (provincial/national) survey, as well as coded qualitatively against the *a priori* theoretical framework of Rösen's (1993) typology of historical consciousness.

Written documentation was analyzed qualitatively according to a two-cycle coding technique (Saldaña, 2009). First Cycle analysis involved descriptive and in vivo coding; this was followed by a Second Cycle of analysis using a pattern coding technique intended to identify narrative templates and patterns of significance. These narrative templates were then compared against Rösen's (1993) typology of historical consciousness.

Interview data was transcribed and analyzed qualitatively according to a similar two-cycle coding technique (Saldaña, 2009). First Cycle analysis involved descriptive and in vivo coding; Second Cycle analysis involved a critical discourse method (Gee, 1999) that focussed upon social roles as an expression of group-identity and social goods as a way of thinking about the past. Second Cycle analysis also involved coding against Rösen's (1993) typology of historical consciousness.

Ultimately, all of the data collected during each of the three phases of the inquiry was triangulated against each of the three procedural sub-questions, according to Falk and Dierking's (2000, 2013) *Contextual Model of Learning*. In so doing, all of the data sets were de-constructed according to four learning contexts (personal, sociocultural, physical, and temporal), then re-constructed in response to the main research question.

Key findings

One of the central premises surrounding historical thinking is the belief that students can be empowered to “read the texts that structure their lives” (Seixas, 2001, p. 561; see also Conrad et al., 2013; Levesque, 2008; Nokes, 2013; Seixas & Morton, 2013; VanSledright, 2011; Wineburg, 2001). In this case study, historical thinking commenced with students actually examining the narratives that they encountered within the museum. They then sought to investigate the artifact evidence and sources behind such narratives, and eventually reinterpreted their findings as exhibit projects. In so doing, students extended their purview beyond the authority of the museum, and as such independently focussed their attention upon

a specific artifact source—drawing evidence from that source, asking questions, corroborating the source, and making inferences that were evidence-based. As a result, students came to recognise complexity in interpreting the past, and slight shifts in historical consciousness became evident within their beliefs about knowledge. These findings provide strong evidence to support Seixas' (2001) assertion that students can indeed be empowered to “read the texts that structure their lives” (p 561).

Through the adoption of a series of scaffolding tools designed around a Material History Framework for Historical Thinking, students who participated in this inquiry became actively engaged in: (a) discovering and deconstructing the narratives that they encountered within the museum, (b) analysing the artifact sources behind such narratives, and (c) reconstructing their own narrative claims. In turn, students' social roles transformed from passive listeners to active participants. Through collaborative use of the same set of scaffolding tools, adult participants became engaged in (a) responding to students' questions, and (b) modelling historical thinking. In turn, adults' social roles transformed from information-transmitters to collaborative agents. Adult participants also developed a sense of empathy for the students as historical researchers. Ultimately, the authority of the museum was challenged in a constructivist way, and the community of inquiry was opened up to include students as active members. These findings are significant because they indicate ways in which the students were actively adopting social roles as members of a community of inquiry. They were no longer sharing common narrative claims about the past, but rather pursuing more complex avenues of inquiry and re-constructing their own claims—within the parameters of the museum.

In examining the historical templates that students constructed, it was apparent that they continued to formulate hybrid narratives (partly their own and partly that of the museum) for remembering the past. Over time, however, these narratives for remembering Canada's past shifted away from what Rüsen (2005) has described as a traditional template—reflecting “consent about a valid common life”—toward an exemplary schema, “reflecting peculiar situations to regularities of what happened” (p. 29). Similarly, students' narratives for remembering New Brunswick's past also shifted away from traditional templates, toward a genetic “acceptance of different standpoints within a compromising perspective of common development” (Rüsen, 2005, p. 29). Within these transitions in historical consciousness, students' narrative re-constructions remained implicitly shaped by the museum. As such, their historical claims were based upon the physical context of where they encountered the artifacts, what other artifacts shared the same exhibit space, what understandings they gained from interacting with the museum volunteers, what they found in the artifact accession files, and what they found from consulting secondary sources.

By comparison, adults' narratives for remembering the past remained largely unchanged over the 14-week unit of study. Adult participants entered into this inquiry with firm narrative beliefs about what they wished to remember about Canada's past and New Brunswick's past. Participation in the fieldwork experience seemed to have no apparent effect upon these narratives. Participation also did not seem to impact adults' pre-existing beliefs about the authority of sources, or the constructed nature of historical knowledge. Nevertheless, participation did seem to bring about meaningful changes in adults' perceptions regarding students' abilities to think historically about the past.

Conclusion

Overall then, returning to the introduction of this abstract, where we sat in the fictional kitchen of the Soprano family, Tony and A.J. Soprano illustrate two distinct modes of

historical consciousness—traditional and exemplary. They also serve to illustrate my original research problem. As the findings from this case study suggest, had the family patriarch and his son participated in a museum fieldwork experience such as this, Tony’s traditional belief about Christopher Columbus probably would not have changed all that much. What might have changed, however, is his tolerance for an alternative perspective on the subject. Given such a script revision, A.J. may also have understood that *truth* lies not in any singular narrative, but in his own ability to carefully examine, compare, and contextualise the evidence behind such narrative claims. In this sense, simply confronting his father’s historical *truth*, with yet another piece of textbook historical *truth*, would not constitute sophistication in historical thinking. Instead, as this case study suggests, in order for the two generations to actually listen and learn from each other, both the adult and student would have to relinquish their positions of authority. This is an important first step in enabling historical thinking within a community history museum.

By opening up the community of inquiry—as happened in this case study—students were empowered to challenge and re-write the claims that they encountered within the community history museum. While the experience did not lead many students to relinquish their trust in the authority of the museum, many adopted more sophisticated strategies for investigating and exploring the narratives that they encountered. They also came to place their trust in multiple sources of information about the past. Through participation in the museum fieldwork experience students began to realise the challenges historians face in piecing together (and validating) remnants of the past. Ultimately, through the lived experience of historical thinking with the museum, *history* became something that students envisioned *doing* for themselves. It was this sense of intellectual freedom...wonder...and discovery...that made the community history museum fieldwork experience so enjoyable for all involved.

These findings have implications for classroom teachers, museum educators, and history education researchers. They also point to the need for further empirical research regarding how museum exhibits can be opened up to enable alternative perspective-taking and more critical thinking about the past.

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About the Author

Cynthia Wallace-Casey holds a PhD in history education, as well as a Masters of Arts in history (with a Diploma in Material Culture) from the University of New Brunswick. She is an Honorary Research Associate in Education Studies at the University of New Brunswick. She commenced her career as curator of a small community history museum in New Brunswick. Her current research interests bridge connections between community history, museums, and classroom instruction in historical thinking.