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Implementing a disciplinary-literacy curriculum for US history: learning from expert middle school teachers in diverse classrooms

CHAUNCEY MONTE-SANO, SUSAN DE LA PAZ and MARK FELTON

In recent years, educators in the USA have emphasized disciplinary literacy as an essential path forward in cultivating adolescents’ understanding of subject matter in tandem with literacy practices. Yet, this agenda poses challenges to teachers who have been tasked with its implementation. Here, we examine two expert US history teachers’ efforts to implement curriculum that integrates reading, writing and thinking in history with academically diverse eighth graders. We conduct qualitative analyses of teacher observations and interviews as well as student work. This analysis provides insight into several issues that emerge in efforts to teach disciplinary literacy in history classrooms: the nuances of teachers’ use of curriculum materials created by people other than themselves, teachers’ appropriation and adaptation of curriculum materials and teachers’ understanding of curriculum materials and disciplinary literacy goals. We find that teachers’ knowledge of the discipline and attention to students’ ideas allowed them to skillfully adapt the curriculum to better meet students’ needs and push students’ thinking. Orienting teachers toward disciplinary learning, ensuring a foundational understanding of their discipline and providing teachers with tools to teach disciplinary literacy are important steps to help students meet the demands of the disciplinary literacy agenda.

Keywords: social studies education; teaching history; literacy; teacher knowledge

In recent years, educators in the USA have emphasized disciplinary literacy as an essential path forward in cultivating adolescents’ understanding of subject matter in tandem with their literacy skills (cf. Moje, 2008). The new Common Core State Standards (Council of Chief State School Officers [CCSSO]) in the USA reiterate this direction by integrating ways
of reading and writing into English language arts, history and social 

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of reading and writing into English language arts, history and social studies, science and ‘technical subjects’ (CCSSO, 2010). And the new College, Career and Civic Life (C3) Framework for Social Studies State Standards reframe social studies as enquiry, placing special emphasis on working with evidence and communicating conclusions (National Council for the Social Studies [NCSS], 2013). No longer is literacy development the official purview of English teachers only. Nor is literacy simply a matter of developing facility with general reading and writing practices regardless of content. Instead, literacy is now framed as a crucial feature in any effort to help students understand and develop knowledge in the disciplines. Because disciplinary literacy includes reading and writing as well as conceptual understanding and procedural knowledge of a discipline, the literacies demanded are not generalizable; they vary by discipline.

Integrating disciplinary literacy into 6–12 classrooms is an ambitious agenda, one that poses challenges to teachers who have been tasked with its implementation. Teachers accustomed to teaching one school subject must now integrate reading and writing. This does not mean simply inserting discrete reading and writing opportunities into existing curriculum, but bringing reading, writing and content together in an integrated way that fosters disciplinary learning and related literacy development. Being able to do so requires deep understanding of a discipline—in particular, how knowledge is produced, communicated and evaluated—because disciplinary thinking is integral to this approach to literacy learning. Thus, teachers must not only know the facts and details of a subject, but also the ways of reading, writing and thinking that form the core of a discipline.

Given the persistence of low reading and writing scores (e.g. National Center for Educational Statistics [NCES], 2012), teachers do not have the luxury of concentrating on subject-specific thinking, reading and writing; they also have to cultivate students’ basic reading and writing so that students have a foundation for disciplinary work that relies on these skills. Teachers will likely have to teach in dynamic ways that embrace modeling, guiding and leading students to become independent with literacy practices over time. This is a substantial shift: one that requires an understanding of a discipline and the literacies that support it (Moje, 2008), as well as pedagogical approaches that will support students’ learning.

Understanding how effective teachers teach disciplinary literacy and make expert judgements could help educators and researchers gain an understanding of how to meet these new demands. Although we do not claim to have expertise in every domain, we suspect that recent calls for disciplinary literacy pose similar concerns to each subject area. We take up these concerns by examining two expert eighth-grade US history teachers’ efforts to implement curriculum that targets one specific student-learning goal located at the intersection of history and literacy: the disciplinary use of evidence in writing historical argument.

The context of this intervention posed significant challenges. In this district—as in many others in the USA—textbook work, coverage of facts and multiple-choice assessments dominate social studies pedagogy. Most of the teachers and students with whom we worked had little to no
experience in working with primary sources or in thinking about history as open to interpretation. Further, one-third of the 13- and 14-year-old students who participated read at the level of an 11-year-old or below. Finally, given the district’s other priorities, we had permission to develop a curriculum that lasted no longer than 18 days.

In response, we developed a one-year professional development (PD) course for teachers and a six unit, 18-day curriculum intervention for teachers to use with their 13- and 14-year-old students. Formal analyses of our results indicates that students who were in classrooms with teachers who used the curriculum and participated in our year-long PD demonstrated significantly better writing outcomes than students in other eighth-grade US history classrooms in the same school district (De La Paz, Felton, Croninger, Monte-Sano, & Jackson, in press). Our results also indicate that students learned to write more advanced disciplinary arguments\(^1\) when teachers were faithful to our lessons, and when students completed key activities.\(^2\)

Given that this curriculum intervention was effective in helping diverse learners use evidence in disciplinary ways as they wrote historical arguments, we explore what teachers did with the curriculum in their classrooms to achieve such goals. We consider the practices of two teachers who were especially faithful to the curriculum and particularly effective in fostering student achievement. We examine these teachers’ use of two ‘disciplinary literacy tools’ (‘IREAD’ and ‘H2W’ or How to Write Your Essay) that represent key tenets of our curriculum. This analysis highlights several issues that arise when trying to teach disciplinary literacy in history classrooms: the nuances of teachers’ use of curriculum created by people other than themselves, teachers’ appropriation and adaptation of curriculum materials, teachers’ understanding of curriculum materials and disciplinary literacy goals and the challenges of transforming complex ways of thinking into a set of curricular materials that are developmentally appropriate for 13- and 14-year olds. Additionally, these teachers worked in very different classrooms—one with more struggling readers and another with primarily strong readers. Therefore, we see how addressing disciplinary literacy can be successful for a range of students and the kinds of adaptations that worked in these two classrooms. We share these teachers’ practices as examples of the ways in which a disciplinary literacy curriculum might be effectively implemented, including the teacher judgements and adaptations that contributed to its success.

**Theoretical background**

*Disciplinary literacy in history*

Because a disciplinary approach to history privileges analysis and interpretation of historical texts, it naturally leads to an emphasis on reading, writing and thinking. Recent work in history education emphasizes particular aspects of historical literacy, ranging from reading (McKeown & Beck, 2004; Reisman, 2012) to thinking (Seixas, 2009) to assessment.
We focus specifically on crafting written arguments from multiple historical sources as one facet of disciplinary literacy in history. Historical writing is not alone in its focus on argument, but the nature of the evidence and the explanation of the link between the evidence and claim are discipline specific (Monte-Sano, 2010). Historical arguments rely on the public display of evidence to substantiate claims (Collingwood, 1994; Hexter, 1971). The inclusion of examples, details, footnotes and quotations exemplifies this aspect of reasoning. Stating where evidence comes from allows others to understand and evaluate the basis for one’s claim. Further, historical interpretations must account for the available evidence (Evans, 1997). This may involve altering arguments to accommodate contradictory evidence. In constructing historical arguments, writing is often inextricable from disciplinary ways of thinking and working with evidence. The use and framing of evidence in historical writing indicate key aspects of disciplinary reasoning including recognizing biases in sources, comparing evidence, situating evidence in its context and taking into account different perspectives and multiple causes (Coffin, 2006; Monte-Sano, 2010).

Crafting written arguments from sources is not just about reading and writing: underlying conceptual understandings guide students’ work with historical sources. Classroom research confirms that students tend to view history as given or established facts rather than as interpretation (VanSledright, 2002). Students tend to think that historical accounts are fixed and that any quest for truth involves choosing the ‘right’ source rather than analysing them and comparing different perspectives (Lee, 2005). Teachers have found the importance of recognizing students’ ideas about history and actively working to develop those ideas so that interpretive work is possible (Bain, 2005). In an environment that supports the development of students’ conceptual understanding of history, students’ ideas about evidence and accounts can progress over time from a conception of given stories to a contextualized understanding of the past (Lee & Shemilt, 2003; Shemilt, 1983).

Teaching historical reading

Even when the goal is written historical argument, generic reading comprehension instruction is crucial. Based on results from the National Assessment of Educational Progress (NAEP), only 5% of adolescents tested in reading could interpret an author’s point as expressed in a document, consistently provide supporting examples for their conclusions about a document, make connections between multiple texts or recognize that a text’s author had a purpose in writing a particular document (NCES, 2007). The 2005 Rand Report also highlights the low proficiency rates in NAEP reading and writing results, and notes the wide disparity among socio-economic, racial and ethnic groups (McCombs, Kirby, Barney, Darilek, & Magee, 2005). Research and position papers highlight aspects of effective reading comprehension instruction, including explicit instruction of comprehension strategies like summarizing, providing...
instruction and practice within subject areas, integrating instruction in practices to be learned within a purposeful activity or collaborative learning with a range of texts, (Biancarosa & Snow, 2004; Langer, 2001). Gathering the main idea of text may be foundational, but reading instruction in history classrooms cannot end with generic reading comprehension strategies if students are to be proficient (e.g. Conley, 2008).

Historical reading enables the kind of interpretive work across multiple texts that characterize history as a discipline. In distinguishing expert and novice historical reading, Wineburg (1991) found that historians regard texts as rhetorical artefacts that give us clues to social exchanges and perspectives from a different time and place. Historical artefacts offer insight into the people who created them and the world in which they lived. Rather than creating artefacts for our use today, historical artefacts were created by people living at a particular point in time with a motivation, audience and world view distinct from ours. In order to understand historical artefacts, we must understand these subtexts, not just the literal text as an emphasis on generic reading comprehension might encourage.

In order to understand historical artefacts, Wineburg (1991) found that historians question their sources—recognizing who created the artefact and when (‘sourcing’), imagining the context in which artefacts were created (‘contextualization’) and comparing and weighing different artefacts (‘corroboration’). Part of historians’ interpretive work in Wineburg’s study also relied on consideration of the usefulness or relevance of different historical artefacts to an investigation. For example, historians studying what happened at Lexington Green in April 1775 found a modern-day textbook less useful than a testimony given by colonists involved in the event a few days after.

Historians also bring questions to their study of the past and this shapes their interactions with artefacts. Yet, balancing the questions we bring to historical study in the present with full appreciation of the original meaning of each artefact examined is crucial to working with evidence. As Collingwood wrote (1994): ‘The scientific historian never asks himself: “Is this statement true or false?” … the question he asks himself is: “What does this statement mean?” … It is the equivalent, rather, to the question “What light is thrown on the subject in which I am interested by the fact that this person made this statement, meaning by it what he did mean?”’ (p. 275). In these ways, generic reading comprehension and historical reading are in constant tension since generic reading comprehension emphasizes our present purposes for reading as well as the literal text. Recent studies have balanced reading comprehension with historical reading strategies so that students improve in both areas (Reisman, 2012).

Teaching historical writing

Research highlights key influences in the development of students’ evidence-based writing: writing genre and reading multiple texts, task representation, and writing processes. Argument and analytical writing in
combination with reading multiple texts has promoted better writing and historical understanding for students in middle school through college than those that rely on textbooks alone and summary (De La Paz, 2005; De La Paz & Felton, 2010; Wiley & Voss, 1999; Young & Leinhardt, 1998). Task representation comprises how students understand just what a writing task entails (Flower & Hayes, 1981). Novices seem to lack an understanding of the task or purpose for their writing, and have unclear goals to guide them as they write (Ferretti, MacArthur, & Dowdy, 2000).

In Greene’s (2001) research, few college students were able to construct an original written argument by analysing information (the approach historians would take); the majority simply recited facts and reproduced others’ arguments (Greene, 2001).

In terms of writers’ processes, Bereiter and Scardamalia (1987) believe that nonexpert writers transfer knowledge to written texts in a model called ‘knowledge-telling’. Developing writers engage in a unidirectional process of establishing a claim first and then finding facts to support it. According to McCutchen (2006), novices may resort to knowledge-telling as a way to manage the complex demands of writing. The cognitive processes of reflection and planning, text production, revising and text interpretation (Chenoweth & Hayes, 2001; Flower & Hayes, 1981; Hayes, 1996) ‘compete for limited resources within working memory’ (McCutchen, 2006, p. 122) and may explain why novices are more likely to generate content than develop a conceptual plan or consider rhetorical goals (De La Paz, 2005). Counsell (1997) explains the particular challenges students face in writing history, including selecting of facts or ideas to include, deciding how to organize this information and figuring out how to present these ideas in writing. Thus, supporting a historical essay’s argument with evidence is difficult for students because they don’t think about history in terms of interpretation and evidence and because the writing process, itself, is complex.

Supporting students’ reading and writing: teacher learning

In research conducted under the auspices of the Center on English Learning and Achievement, Grossman, Smagorinsky, and Valencia (1999), Grossman et al. (2000) use activity theory to frame learning to teach English as a process of appropriating pedagogical tools. They consider two kinds of pedagogical tools: conceptual tools and practical tools. Conceptual tools are ‘principles, frameworks and ideas about teaching, learning and English/language arts that teachers use as heuristics to guide their instructional decisions’ (Grossman et al., 2000, pp. 633–634). Practical tools include strategies, practices, or resources used in teaching that ‘have more local and immediate utility’ (Grossman et al., 1999, p. 14). The process of appropriation shows the extent to which teachers appropriately use practical tools they’ve been exposed to. In using practical tools, teachers theoretically internalize the ways of thinking that support the effective use of such tools (Grossman et al., 1999, p. 15).
Here, we focus on history teachers’ work with two disciplinary literacy tools that were a key part of curriculum we designed. We consider these disciplinary literacy tools as ‘practical tools’ or strategies (Grossman et al., 1999). We examine two expert teachers’ practices and thinking to understand how they make use of and think about two disciplinary literacy tools as they work to improve their students’ disciplinary use of evidence in writing historical arguments. The disciplinary literacy tools represent central tenets of our curriculum. By focusing narrowly we gain insight into both teachers’ appropriation of these specific tools and their understanding of the curriculum more broadly. Given the limited research on history teachers’ disciplinary literacy instruction and implementation of curriculum, we ask four questions. (1) How do teachers implement practical tools designed by researchers to support students’ disciplinary use of evidence in writing historical arguments? (2) How do teachers think about their implementation of these disciplinary literacy tools? (3) What challenges do history teachers face in implementing tools to support students’ disciplinary literacy? (4) What knowledge, beliefs, or dispositions appear to help teachers use these tools and foster students’ disciplinary literacy?

**Method**

This paper uses mixed methods to examine teachers’ use of two disciplinary literacy tools created by researchers as part of a curriculum and PD intervention.

**Participants and context**

We worked with a large school district on the borders of a major city in the mid-Atlantic region of the USA for three years that included urban, suburban, and rural communities. The district serves a socially and ethnically diverse group of students: 45% of the students receive free and reduced meals service, 8.5% receive English services for speakers of other languages and the majority of the students are African-American followed by a growing Hispanic population. Each year, we worked with a different cohort of eighth-grade US history teachers and students and refined our intervention based on the successes and challenges identified in the previous year.

Here, we focus on two of the 16 teachers who participated in our curriculum and PD intervention during the second year of the project. Five teachers acted as control teachers (they administered pre- and post-tests to their students) without participating in the PD activities or in the curriculum intervention. Intervention and control teachers worked at schools the district identified as having between 15 and 30% of the student population who were significantly below grade level in reading, although the majority of the individual student participants were proficient or advanced readers. Before this intervention, history assessment included multiple-choice questions and the dominant mode of instruction appeared to be...
answering informational questions from the textbook. Students considered history as given information.

We selected Ms Janney and Mr Addison as the focus of this paper because they demonstrated high fidelity in implementing the curriculum, revealed expertise in teaching disciplinary literacy and understood history as an interpretive discipline. At the same time, both teachers worked with very different students even though they taught at the same school (see table 1). Mr Addison worked with more students with disabilities and students with weak reading skills, whereas Ms Janney worked with more advanced and proficient readers overall. Despite these differences, Mr Addison and Ms Janney had very high fidelity scores (both were over 90%) indicating that they adhered to the curriculum to a great degree.

Students of both teachers took a pre- and post-test designed to measure their disciplinary use of evidence in writing historical arguments before and after the intervention. Ms Janney had 121 students and Mr Addison had 135 students, of which 25–27 students were randomly selected as participants in the final pool of data. Our goal was to select about the same overall number of students from each teacher in the study in order to manage the data. The final pool of data included 20 teachers, 385 intervention students and 120 control students. We scored this and used it to report student outcomes (De La Paz et al., in press).

The curriculum and disciplinary literacy tools

The 18-day curriculum we created includes six investigations taught over the course of one academic year in eighth-grade US history classes. Each investigation centres on a historical question and two contrasting historical documents. Day one of each investigation involved reading and annotating the documents, using a mnemonic device as a guide (‘IREAD’).

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Mr Addison, students = 25 (%)</th>
<th>Ms Janney, students = 27 (%)</th>
<th>All teachers, students = 478 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boys</td>
<td>64</td>
<td>52</td>
<td>47.5</td>
</tr>
<tr>
<td>African American or Black</td>
<td>56</td>
<td>48</td>
<td>71</td>
</tr>
<tr>
<td>White</td>
<td>4</td>
<td>3</td>
<td>5.2</td>
</tr>
<tr>
<td>Native American</td>
<td>28</td>
<td>18.5</td>
<td>10.9</td>
</tr>
<tr>
<td>Asian/Pacific Islander</td>
<td>12</td>
<td>16</td>
<td>4.6</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
<td>7</td>
<td>8.4</td>
</tr>
<tr>
<td>Hispanic</td>
<td>40</td>
<td>40.7</td>
<td>21.3</td>
</tr>
<tr>
<td>Below basic readers</td>
<td>8</td>
<td>0</td>
<td>2.9</td>
</tr>
<tr>
<td>Basic readers</td>
<td>64</td>
<td>18.5</td>
<td>31.2</td>
</tr>
<tr>
<td>Proficient readers</td>
<td>28</td>
<td>40.7</td>
<td>44.4</td>
</tr>
<tr>
<td>Advanced readers</td>
<td>0</td>
<td>40.7</td>
<td>21.6</td>
</tr>
<tr>
<td>English learners</td>
<td>24</td>
<td>11.1</td>
<td>7.1</td>
</tr>
<tr>
<td>Students with IEPs</td>
<td>24</td>
<td>0</td>
<td>6.9</td>
</tr>
</tbody>
</table>
On day two, students deliberated about the documents and the question, using a Structured Academic Controversy (Johnson & Johnson, 1988) and graphic organizer as support structures. Day three involved planning and composing an essay using several writing supports: a text structure model (‘How to Write Your Essay’ or ‘H2W’), sample essays and sample phrases for writing. At different points in the first three investigations, teachers introduced what to do on each day using the various scaffolds we created. We asked teachers initially to model how to use these supports, give students practice in using these scaffolds and ultimately promote students’ independence with the supports built into the curriculum.

In this paper, we focus on teachers’ use of two tools in particular: (1) the IREAD mnemonic device used to guide students’ reading and annotations, and (2) the H2W text structure model used to guide students’ planning and composing. There are risks in boiling complex processes into concrete tools for students’ use; for example, students and teachers may learn to follow discrete steps without gaining foundational understanding (Westhoff, 2009). The tools we share are embedded with a particular form of cognitive apprenticeship (Brown, Collins, & Duguid, 1989), in which teachers initially modelled the use of each tool and subsequently guided students’ attempts at using each flexibly and independently. Highly structured learning opportunities such as these have been effective in research with students with diverse learning profiles (De La Paz & Graham, 2002).

We associate each tool with core teaching practices in history education that are necessary for teaching historical thinking and writing. Yet, for most teachers these tools and the practices associated with them represent a departure from conventional social studies instruction (Cuban, 1991).

Overview of the IREAD tool. We took lessons from Wineburg’s (1991) research to heart and initially constructed IREAD to focus on the subtext of historical texts, emphasizing what each text does to the reader over what each text said on a literal level. Yet, we found that students and teachers often avoided reading the entire text because doing so was challenging. Instead, they searched for specific clues around the periphery of the text such as the author and date of creation without a focus on the substance of the text. Even if they did read the text, students often had little to no basic understanding of it; this limited their ability to understand the subtext and draw inferences (even if they did notice features such as author and date). We realized that we needed to balance reading comprehension and historical reading strategies more evenly for our students to be successful (see Appendix A for a poster version of this tool).

To support generic reading comprehension, we used R (‘Read the whole document once’) to prompt students to identify and summarize what the author wrote (e.g. Jitendra & Gajria, 2011). One cue for R is to consider what the author would say in response to the historical question. Certainly, the authors of historical texts did not write with the questions we ask in mind; however, this cue supports students’ reading comprehension by having them connect the text to the investigative question, providing guidance and purpose as students read. IREAD also embeds a
process of annotation to help struggling students notice specific aspects of texts and track their thinking. In previous work, we observed the annotation process used effectively with advanced students (Monte-Sano, 2011).

Prompts to encourage sourcing and contextualization (Wineburg, 1991) sandwich R, so that students might begin to regard historical texts as the product of an author with intentions and as situated in a different time and place. We added the final prompt (D—‘Detail your evaluation of the document in the margins’) because in earlier iterations, students noticed details like the author or date, but did not use this information to make inferences. The addition of D cues students to analyse and critique the texts, rather than amass information about them. These cues highlight the use of evidence given the particular investigative question posed. Historical actors didn’t write texts with the intention of reporting on questions we ask today; however, it’s worth asking in what ways a text is and is not helpful as a source of evidence in considering a particular question. In addition, it’s important for students to consider the author’s position and context in relation to what s/he shares in writing.

Consider Investigation 2 as an example (‘Were Daniel Shays and his followers rebels or freedom fighters?’ see Appendix B). Abigail Adams’ perspective on the main topic of her letter to Thomas Jefferson—Shays’ Rebellion in Massachusetts—is shaped by the fact that she’s from Massachusetts, but residing in London as the events unfold. We can assume that she is learning of the events from friends and family who remain in Massachusetts, rather than witnessing them firsthand. Most of the people she communicates with are likely wealthy and their position may be threatened by the events. They are probably not affected in the same way as others living in Massachusetts, who were jailed for failure to pay debts. In some ways her position with regard to the events she describes may give her a broader perspective, but in other ways she may be unaware of certain details. And even though her letter is dated 29 January 1787, given the pace of communication in this time period Adams would not yet have heard about the major confrontation at the federal arsenal in Springfield that took place a few days earlier and ultimately led to the rebellion’s demise. IREAD is designed to breakdown these complex ways of reading into explicit, attainable steps that novice readers can learn.

That means that the first time students confront a historical text, they won’t have to read like an expert. Instead, they can take small steps, trying out a different aspect of historical reading during the first few investigations. Initially, students learn one part of IREAD at a time and they are presented as discrete steps, but by the end of the year, students integrate these steps into a more holistic approach to reading. And certainly, IREAD does not capture all aspects of historical reading, but those we thought were most important as well as possible to introduce and cultivate students’ independence with by the end of the 18 days.

**Overview of the H2W tool.** We created a visual model for a particular form of argumentative text (See Appendix C), based in part on prior research by Meyer, Brandt, and Bluth (1980), who found that text
structure allows readers to identify and remember top-level or central information from text. Explicit signals (e.g. topic statements, summary statements and key words) cue text structure and the location of expository content. Good readers who detect these cues can remember more ideas when reading expository texts than students who do not search for or identify text structure (Meyer & Freedle, 1984). Moreover, intervention work on the use of text structure (beginning with Englert, Raphael, Anderson, Anthony, & Stevens, 1991) indicates that providing students with direct instruction on how expository ideas are organized into text structures is a successful scaffold for helping students to write better essays.

We extended this work by creating a disciplinary text structure, representing it in a visual model that included essential components of historical arguments as well as information that signaled how to organize essential components in the composition. We embedded a list of transition words and phrases (e.g. ‘this point makes sense’ and ‘when all of the facts on both sides are considered’) that were shown in relevant categories for historical writing (e.g. evaluating a quote, wrapping things up) based on the success of this type of tool in our prior work (De La Paz, 2005). H2W reminded students to use evidence they had identified and evaluated through reading and discussion when writing their historical arguments. To encourage analysis and critique of the evidence students used in their essays, we prompted students to explain ‘how reliable the author is’, which again alludes to the link between evidence and investigative question (e.g. in what ways is this evidence useful in considering the question and in what ways is it not useful?). In working with students, we found that the term ‘reliability’ prompted students to evaluate evidence and make inferences, rather than simply report information about it.

The PD programme

We met with teachers for 88 h across 11 all-day PD sessions. Teachers earned six graduate credits for completing the year-long course. In the first four sessions of the course, we aimed to give teachers an understanding of historical concepts such as evidence, accounts, perspective and context as well as knowledge of historical reading, deliberation and writing. Then, we introduced teachers to the curriculum, one investigation per meeting and used these investigations as opportunities to delve deeper into the concepts introduced during the initial sessions. We used the Grossman, Hammerness, and McDonald (2009) framework of sharing representations, decompositions and approximations of practice to help teachers learn to enact the practices embedded in each investigation. Using this work as our guide, in each PD session we modelled the use of the curriculum materials for that investigation, debriefed the key elements of each investigation and talked through how teachers might enact these elements, and gave teachers opportunities to practise teaching key aspects of the investigation to their peers. Practice sessions involved teachers...
working in small groups of four to five, taking turns using the materials, sharing feedback and brainstorming how to use the curriculum effectively in their classrooms. In this way, PD sessions included modelling the use of disciplinary literacy tools, practice in using these tools and discussion of developing students’ historical thinking and writing. PD can be effective when it enhances teachers’ subject matter knowledge, provides extended learning time, actively engages teachers and links to what teachers are asked to do (Wilson, 2009). We designed PD experiences to best support teachers’ learning of this new approach to teaching history using design principles found in effective PD.

**Data sources**

Throughout the year, our research team observed each teacher implement every day of each investigation for a total of 18 observations per teacher. For each observation, one member of our research team completed a fidelity protocol that focused on whether key elements of the curriculum were presented to students and the quality of teachers’ implementation of key elements. Each prompt included a space for written comments to describe different features of the teacher’s lesson. The fidelity protocols were intended to indicate the extent to which teachers implemented the curriculum faithfully.

Throughout the year, teachers regularly debriefed the experience of teaching each investigation during our PD sessions. We video-recorded these conversations in order to gather evidence of teachers’ thinking. Teachers also participated in semi-structured individual and group interviews at the end of the year. These interviews were designed to elicit teachers’ thinking about each disciplinary literacy tool and investigation so that we could estimate the extent of their understanding and gather feedback. Finally, teachers completed a questionnaire at the beginning and end of the year (see Appendix D) as well as the same post-test task the students completed at the end of the year. The questionnaire and post-test task were intended to measure teachers’ disciplinary understanding and historical thinking practices. The questionnaire also measured teachers’ pedagogical content knowledge by asking them to analyse students’ work and devise instructional responses to support students’ continued learning of historical reading and writing.

**Data analysis**

In order to select teachers, we tabulated teachers’ average fidelity score across all six investigations using our assessments of the quality of the key elements of the lesson. We used these scores to determine which teachers best supported the intentions of the curriculum. Ms Janney and Mr Addison were both remarkable—not only for the degree to which they implemented the lessons in ways that reflected our intentions, but also because they made sure that students completed activities that were
central to the learning outcomes. In fact, their use of the curriculum was more important to students’ learning than students’ initial writing abilities or learning characteristics, which does not always happen in culturally and academically diverse schools (De La Paz et al., in press). We used the teacher questionnaires and post-test task to verify that each of the exemplary teachers had an equal footing in terms of their disciplinary understanding and pedagogical content knowledge. Both Janney and Addison demonstrated strong disciplinary understanding and pedagogical content knowledge. For example, both were able to construct their own coherent document-based lesson plan and recognize a student’s use of evidence in an essay. These analyses allowed us to pick experts who used a defined curriculum differently and successfully.

We analysed all 18 fidelity protocols per teacher to identify what each teacher did with the IREAD and H2W tools in the classroom. For each teacher, we created a graphic display (Miles & Huberman, 1994) to organize notes for each tool by investigation. We then looked across the investigations to see trends and adaptations in how Janney and Addison used IREAD and H2W. Finally, we compared the notes on each teacher to recognize cross-case themes and variations.

Both individual and group interviews were transcribed. We read through the individual interview transcript for each teacher separately, organized Janney’s and Addison’s transcripts by question, and compared responses to each question. In reading the transcripts, we looked for themes in teachers’ reporting of how they used and thought about the curriculum and disciplinary literacy tools. We arranged transcript excerpts by theme with each teacher’s words in separate columns in order to facilitate comparison. Lastly, we included details from the group transcript that related to themes found in the individual interviews.

**Findings**

Ms Janney and Mr Addison used the disciplinary literacy tools from this project with great facility, demonstrating their knowledge and skill as expert teachers. Their use of these tools also gave us insight into the parts of the curriculum intervention that worked well and those areas that needed further development. Some of their most important contributions were not in the literal application of the tools in their classrooms, but in their adaptation and extension of them as they worked to meet different students’ needs. Below we share the challenges, successes and changes we observed as Janney and Addison used IREAD and H2W to support their students’ use of evidence in argumentative history essays.

**Enacting cognitive apprenticeships**

Because we used a version of cognitive apprenticeship (Brown et al., 1989; De La Paz & Graham, 2002) as the underlying model for this curriculum, we asked teachers to think aloud while modelling particular
reading and writing strategies, give students opportunities to practise these strategies with guidance and encourage students toward independence, all while offering feedback to them. The introduction of IREAD and H2W included these phases of instruction in the curriculum, and Janney and Addison implemented each phase with students. However, the extent to which each teacher modelled, guided and allowed for independent practice varied given the different student needs in each classroom. Ms Janney, who worked with more advanced readers, modelled IREAD for two investigations, whereas Mr Addison modelled IREAD for three. Both teachers showed students how to annotate a document on an overhead projector while thinking aloud, but Addison gave additional support to his struggling readers by explicitly summarizing key ways of reading and annotating on an accompanying white board. For guided instruction, both teachers used a mix of small group and whole class instruction, but Addison used smaller groups and engaged in whole class instruction more often to guide his students more heavily and maintain their focus. Mr Addison also paced students’ work more actively (e.g. work on one letter of IREAD independently and then share), whereas Janney allowed her students to work collaboratively without her guidance for longer (e.g. use all of IREAD and then share).

The most challenging aspect of the cognitive apprenticeship model was transitioning toward independence, a step that we encouraged teachers to take in Investigation 4 with IREAD. Whereas Janney promoted independent work by Investigation 3, Addison turned control over to students in Investigation 5. He modelled for longer and guided students more heavily until he felt they were ready to work independently. These approaches to cognitive apprenticeship worked given the needs of each teacher’s student population.

Moving beyond literal use of IREAD to promote disciplinary thinking

In their use of IREAD, Ms Janney and Mr Addison did more than teach students what to do when annotating for each letter. They went beyond these literal steps in their whole-class instruction and individual or group feedback to highlight the disciplinary thinking behind the IREAD tool. Broadly, both teachers portrayed the historical documents that students annotated as arguments made by authors which could be used to help students develop their own arguments (Although all historical sources are not arguments, we selected sources that made arguments so that the texts students read represented the written texts we hoped they would produce. Here, we build on Chambliss and Murphy (2002), who found that exposing students to texts with explicit argument structure leads to better recall and structuring of arguments). On the pre- and post-intervention questionnaire, both teachers evaluated given evidence in constructing their own written arguments, demonstrating their strong disciplinary knowledge. This knowledge translated into their teaching of each investigation: Janney and Addison offered instruction and feedback that prompted
students to think about documents as excerpts of past conversations and construct their own arguments in response to their consideration of sources.

In the first investigation, Janney emphasized the interpretive nature of history, explaining that historians use primary sources to investigate questions about the past and develop arguments. She said they would do the same by weighing different points of view represented in historical sources. Janney consistently prompted students to question authors while annotating documents in later investigations. For example, when students finished annotating both documents in the first investigation, she asked them their opinion about the controversy emphasizing that the authors each provided a perspective with which students might agree or disagree. By Investigation 3, Janney encouraged students to clarify and justify their annotations. For example, she prompted students to justify their description of the author's perspective to help them grasp the author's stance on the historical controversy. And after they finished annotating documents, she was particularly effective at debriefing students' annotations in whole-group when listing and discussing their reasons for questioning or trusting each author's perspective. These additions to the curriculum helped make disciplinary thinking more accessible and meaningful for students by providing a context for both recognizing and critiquing the authors of the documents. They also speak of her ability to focus student attention on the disciplinary thinking behind the IREAD tool.

As students turned to composing their own interpretations, Janney consistently prompted students to tighten their arguments by justifying their use of evidence. As she said at the end of the year,

I think that challenging kids' thinking and questioning them in terms of how they reached their conclusions [was important]. ... 'Why'? became a constant response to everything they had to say, like 'What made you think that? What got you there?' I think that I engaged them in critical thinking. I feel like that was the most significant change I saw in myself as a teacher.

Observers noted that Janney was particularly effective in prompting students in small groups. Janney twice connected the idea of supporting an argument with evidence to being a lawyer. Given her constant challenges to students to elaborate on their thinking, we suspect this analogy was intended to help students recognize the need to include evidence to support an argument.

Like Ms Janney, Mr Addison also represented texts as more than literal tomes—a contrast to the way in which history textbooks are often used. He consistently put students in the position of deliberating among and judging texts in light of their authors and context and progressed to more complex forms of reasoning over the course of the curriculum. In the first investigation, he helped students shift from their typical acceptance of historical texts as true stories by comparing their work in an investigation to personal experiences they've had in the past with having to judge whether or not something is true. By Investigation 5, Addison had moved beyond a true/false dichotomy by pushing students to 'weigh evidence' in order to figure out their thinking about the controversy.
He prompted students to discuss why each source or author might be trustworthy, why particular excerpts are convincing, and why the text might or might not be ‘good’ evidence for a conclusion in response to the question. Such comments guided students to analyse texts in light of their sources rather than simply accept them as given.

Addison supported students’ disciplinary thinking in other ways as well, helping with contextualization and interpreting an author’s meaning. In Investigation 3, he helped students understand the documents by highlighting the political interests of the two newspapers that published the anonymous letters to the editor (one was a newspaper that supported the Federalists; the other a newspaper that supported the Democratic Republicans). He equated the differences in these historical newspapers to a news station located in a city far away reporting on the football team in their town as compared with a local station reporting on the same team, its hometown football team. And then he related the differences in the documents to the context of the times and the disagreements between the two political parties. When students discussed the documents and the historical question, Addison circulated asking questions like, ‘What makes you think that’? ‘Does that make the author for or against Democratic Republican societies?’ ‘Would the author say [Democratic Republican societies] are patriotic or subversive?’ ‘Go back and find some support for why [you think] they are bad or subversive’. Comments like these directed students back to the documentary evidence both for comprehension and argument construction purposes.

In these ways, Ms Janney and Mr Addison helped students move beyond the concrete, literal steps of annotating specific aspects of the historical documents to practise thinking historically about the information they annotated and use this information to draw conclusions about the documents and the historical question. Most of their prompting came in response to students’ comments or guided practice and independent work, indicating that Janney and Addison listened to their students’ thinking. After modelling, they circulated constantly and used this time to give feedback (both individually and to the whole class) to prompt students’ thinking further. The feedback component of the cognitive apprenticeship model became a place to attend to students’ disciplinary thinking and draw out the thinking behind IREAD. This was entirely unscripted yet crucial in furthering the aims of this tool.

Building background knowledge

In addition to providing helpful feedback to further students’ disciplinary thinking, Ms Janney and Mr Addison made adaptations to support students’ reading and analysis. Both teachers recognized that students needed more background knowledge to think through the historical controversy, make sense of the primary sources and evaluate them. Addison started three investigations with a video detailing relevant background knowledge followed by review of the events leading to the controversy under debate and its historical context. In Investigation 3, he lectured
and used graphic organizers to outline the birth of political parties and the beliefs of the Federalist and Democratic-Republican parties in the late 1700s. Then in Investigation 5, Addison shared a Facebook page he had created about Frederick Douglass (the class had previously been creating Facebook pages about important African-Americans). He used this Douglass Facebook page to highlight the meaning of words such as emancipate, abolish and abolitionism. He connected this page to a student’s page on Nat Turner to begin a discussion about nonviolent and more aggressive action used across time in the struggle for freedom and civil rights. This last opening helped students understand substantive concepts such as nonviolence and abolitionism. More typically, Addison’s openings helped students understand the particular historical context of the controversy that centred each investigation and took no more than 15 min. The same was true for Janney. In four of six investigations, she spent additional time and used her own resources to go over relevant background beyond what we included in the curriculum. Once she had students read and discuss a textbook chapter; otherwise, she gave mini-lectures so that students had some understanding of the historical context to aid their reading and analysis.

Connecting disciplinary writing to reading and discussion activities

Both teachers linked writing to prior activities from the first two days of each investigation and to the use of other tools. As such, they framed writing as part of the overall effort to engage in disciplinary thinking, rather than as another step in what might appear as a disconnected process. In the very first investigation, Janney explained to students that primary sources illuminate historical questions and discussion is a process for weighing the authors’ points of view. When students later looked at model essays, she asked them to note where the author used evidence in the model essay, asking them to share aloud which evidence they found particularly good. She then asked if students could find where the author contrasted two sources, prompting them to notice how the final essays drew on the annotations from day one of the investigation. Whereas Janney focused on the use of evidence to create an argument in the model essays, Addison focused on the connection between evidence that students identified in documents and how they could use that information in their final essay.

Although they differed in how they created these connections, each teacher helped establish a link between students’ reading, analysis and writing. For Janney, evidence was the linchpin that held the three days of each investigation together. She helped students see annotation as a process for identifying and evaluating evidence that they could cite in their essays. As she later explained, ‘I think that [IREAD] helped them draw out more evidence and it helped them look at the document a little longer. That’s a problem in a lot of classes, the kids are taught to skim and scan and go’. 
Addison also connected steps in the annotation process to writing. During the third investigation, in their consideration of whether Democratic-Republican societies were patriotic or subversive, he shared how their evaluations of evidence (determined after comparing the similarities and differences in evidence in each document during the D step of IREAD) could be used for a rebuttal paragraph, as shown in the H2W tool. Addison encouraged students by explaining how they had completed most of the work for their plans already, by creating annotations for each document.

In addition, both teachers connected students’ discussions to the writing process. From the start of the year, Janney had a firm grasp of how the discussion process worked and explained its importance in the process of developing an historical argument. By the fourth investigation, Janney prepared students for discussions by having them select the quotes they would use in their essays. The class then used the discussion time evaluating their evidence in pairs to prepare for the essay. As she later explained, ‘We’re spending a lot less time on the logistics and more time on the documents … I like the kids to see an end goal. Like, “this is what we’re going to do with all of this information we’ve been gathering”’. By the fifth investigation she prompted students to cite evidence to support their conclusions regularly in discussions.

Addison also helped students understand the connection between what they discussed and how that information related to the writing process. In the third investigation, he explained that information students noted during discussions (which focused on explaining and evaluating evidence), related to the structure of a finished essay: he showed students that the notes they took on explanations and evaluations of evidence during discussion was the same content used to write their supporting and rebuttal paragraphs. He further explained how notes on evaluations of evidence could be used as in writing a rebuttal. In an interview, Addison explained that he saw these connections and realized that pointing this out to students would help them understand the entire process and organize their paragraphs.

Differentiating instruction to support student learning

Ms Janney consistently focused on supporting English learners. She pushed us to provide more resources for English learners and she actively used resources we created such as vocabulary previews to develop academic language and translated primary sources. In addition to our materials, she regularly met with English learners in small groups to build their historical and cultural knowledge and support their capacity to make sense of the documents. At the end of the year she explained,

Kids who just immigrated from … El Salvador or Mexico … they’re like, well ‘I don’t know why the Civil War is important’, like ‘Why does it matter?’ … Not really having that context was kind of hurtful for them. So a lot of times, I would sit down with them in groups, and pull out groups,
and just talk about … ‘This was what was going on at the time, this was why it is important in American history, this is how it affects us today’.

She also worked with English learners to modify their writing goals so that they were appropriate given students’ English skills. Often this meant asking English learners to write fewer paragraphs or write shorter paragraphs in the initial writing stages.

In our PD class and in his exit interview, Mr Addison commented on the need to provide different amounts of support to students, depending on their incoming skills and progress. When asked what made the curriculum work for him and his classes he said,

Knowing what students are able to do and where they’re going to be able to do it. And also, having different goals for different students. ... If my goal was what the sample essay looks like for every student, I would have lost my mind because ... certain students ... write two paragraphs [and] that’s a victory right there, and other students, they can already move to that. But just really understanding, being flexible and looking more at growth than final product.

His main strategy was to spend more time with struggling students one-on-one rather than pull them together. In some classes this meant Addison ran around a bit to work with different students, but it also drew less attention to the group of students who struggled. Addison’s advice to other teachers was to ‘Be flexible. It’s not a rigid step-by-step thing ... Meet students where they are’. Both teachers acknowledged that students do not start in the same place or progress through the curriculum at the same pace. While they felt that most of their students demonstrated growth, they realized that students needed different amounts and kinds of support. Their attention to students’ thinking and work with the curriculum tools made such insights possible.

Discussion

Making a disciplinary literacy curriculum work

Ms Janney and Mr Addison both implemented the disciplinary literacy curriculum with great fidelity, but they also made key modifications that we believe contributed to their effectiveness. First, these teachers’ adaptations were driven by their desire to fit the curriculum to students’ needs. Both teachers consistently reflected on what was working for their students. When they found students struggling, they made changes to help those students reach the goals of the curriculum. Their actions indicate a belief that all of their students could improve their historical writing. Instead of dismissing the curriculum or blaming students when the two didn’t work together perfectly, Janney and Addison hunkered down and tinkered with the curriculum to make it work for different students. They took responsibility for their students’ learning. In their attention and responsiveness to students, Janney and Addison enhanced the curriculum.
Further, the changes aligned with the curriculum’s goal of developing students’ disciplinary use of evidence in writing historical arguments. Addison spent more time on modelling and guided practice than specified in the curriculum because he believed his students hadn’t yet developed habits of historical thinking while reading and needed more scaffolding to achieve this goal. When both teachers asked follow-up questions they pushed students’ historical thinking to help them evaluate primary sources, reason about the controversy and make evidence-based claims. Rather than muddying the treatment, the teachers’ decisions augmented the focus on disciplinary literacy.

Addressing challenges in implementing a disciplinary-literacy curriculum

The main challenges for each teacher lay in making the curriculum work for the wide range of students in their classes. We took teachers’ adaptations as feedback and incorporated their ideas into the final year of curriculum revisions, having learned alongside the teachers in this approach to intervention research. For example, every investigation now starts with a video and/or timeline activity to give students a chance to draw on and integrate subject matter knowledge while reading and analysing.

Janney and Addison were able to use IREAD as a starting point for pushing their students’ historical thinking and analysis. As they became more familiar with the tool, they prompted students to use the information they annotated to make inferences about historical sources and to draw conclusions about historical controversies. Other teachers with weaker disciplinary understandings used IREAD by sticking to the steps laid out in each letter without prompting students’ disciplinary thinking or evaluation of the information students annotated. We believe these problems are augmented by IREAD’s structure: IREAD saved the evaluative thinking until the end, until completing ‘D’, when really it’s more sensible to evaluate each piece of information as it’s unearthed. When students note the author and his or her intentions, they should use that information to make a judgment about that author’s perspective and how it influences what the author’s text says and does. The information isn’t valuable in and of itself; it’s valuable for the conclusions it allows you to draw about the author. In response, we revised IREAD for the final year of the project so that the evaluative component that was in ‘D’ is now invoked for every letter of IREAD, for every aspect of historical reading. We hope this will encourage more teachers to use IREAD as Janney and Addison did by pushing students’ inferential and evaluative thinking as they read.

Another challenge we saw was related to planning and the writing process. When teachers as expert in their understanding and implementation as Mr Addison did not always promote planning, we decided to make changes. Proficient writers such as adults do not routinely engage in written planning, so teachers may not feel it’s necessary to model planning. If they don’t model, they may not ask their students to plan.
Teachers may need more support in thinking about writing from a novice perspective and recognizing what novices need to be successful; therefore, we built in more support for planning in the third year. Specifically, we changed the way we guided teachers and students through the planning process, gave more support for students’ evaluation of historical sources and created more explicit links between how to use the H2W text structure as students engage in planning.

Key supports for teachers in implementing a disciplinary-literacy curriculum

We have considered the particular ways in which effective teachers implemented a disciplinary literacy curriculum focused on historical use of evidence in argumentative essays. Now, we return to broader issues related to teaching disciplinary literacy. In particular, we consider the knowledge, beliefs or dispositions that appeared to support the teaching of disciplinary literacy. One key to success is that teachers adapted the disciplinary literacy curriculum to their particular contexts. Yet, by their very nature, changes and adaptations to a curriculum are not scripted. So, what supports teachers in making successful modifications? In these two cases, teachers’ understanding of students, teaching and history were key.

Ms Janney and Mr Addison demonstrated their knowledge of students, pedagogical content knowledge and disciplinary understanding throughout their use of IREAD and H2W. In providing background information, both teachers showed awareness of students’ needs. And in their persistent circulation among students—including their careful listening to students’ comments and responding to students with prompts to develop their thinking—both teachers displayed a strong understanding of how students made sense of history and the challenges they faced in doing so. Whether in one-on-one or whole-class interactions, Janney and Addison often identified challenges students faced and asked directed questions to push students’ thinking and reinforce ideas about the disciplinary use of evidence such as considering an author’s perspective or comparing two sources’ relative utility in responding to a historical question.

Teachers’ strong historical understanding positioned them well for adapting the disciplinary literacy tools to meet students’ needs and push their thinking. Yet, even with relatively strong disciplinary knowledge, these teachers’ adaptations weren’t always fully supportive of historical thinking. For example, one teachers’ lawyer analogy might have been helpful in orienting students to the concept of evidence-based argument, but detract from their historical thinking by encouraging them to regard evidence as right or wrong. This speaks to the need for ongoing conversation about teachers’ instructional decisions and how well they support students’ argumentative writing and historical thinking. In addition, they had less developed knowledge of teaching writing, and this may have affected their use of and thinking about writing supports. Janney and Addison integrated the writing supports differently, emphasizing different aspects of the writing process. While Addison felt the annotation of primary
sources was one of the most important steps in the writing process, Janney felt that one-on-one feedback was essential. Both altered the extent to which they integrated planning and how they integrated planning. While disciplinary understanding is important, so too is knowledge of writing.

Janney and Addison show us that with a strong foundational understanding of students and history, it’s possible to implement a disciplinary literacy curriculum skillfully as long as the adaptations stay true to the intentions of the curriculum. Teachers’ adaptations and moment-to-moment responsiveness to students’ thinking cannot be scripted. Yet, teachers need to be prepared to respond effectively to students beyond simple delivery of material. Addressing the disciplinary literacy agenda for adolescents, then, should ideally focus on developing teachers’ knowledge as much as the foundational emphasis on student learning. In this case, teachers’ understanding of the discipline and literacy in the discipline, as well as students’ thinking and learning of disciplinary literacy, facilitated successful work. Supporting teachers’ learning equips them to adapt disciplinary literacy tools effectively or develop their own.

But what can be done to support teachers’ learning and readiness to respond to students’ disciplinary literacy needs? One aspect of PD that we found particularly helpful moved beyond delivery of material to analysis of students’ work that resulted from our lessons (Monte-Sano, De La Paz, & Felton, 2012). Other researchers have found that PD focused on analysing students’ thinking has helped teachers notice their students’ disciplinary thinking and even develop instructional steps in response (Kazemi & Franke, 2004; van Es & Sherin, 2008). Using videos of class or student work samples, these PD efforts highlight teachers’ developing skill in noticing students’ ideas and diagnosing progress. Given the emphasis of these studies on disciplinary learning, we believe such work also holds promise for supporting disciplinary literacy outcomes.

**Limitations**

In studying teachers’ growth, a database of videos recorded throughout the intervention alongside regular teacher interviews about their instructional decisions would be ideal in identifying teachers’ thinking and practice over time. Nonetheless, observation protocols and student work samples allowed us to track teachers’ classroom work with this disciplinary literacy curriculum over time.

One of the biggest challenges we faced was to shift students’ and teachers’ conceptions of history as a given set of information to an interpretive act based on evidence. In terms of Lee and Shemilt’s (2003) progression in ideas about evidence, students started the year thinking of evidence as ‘pictures of the past’ and progressed to a ‘scissors and paste’ view of evidence. While they did not attain expert historical thinking, students certainly progressed in their thinking about evidence after only 18 days of instruction. Students moved away from accepting given stories and regarding the past as fixed and known. They began to consider
notions of bias and perspective as they questioned sources and investigated, comprehended that we learn about history by examining traces of the past left by people living at the time, and saw that history has a methodology for testing statements about the past.

We believe both teachers tried to scaffold students’ learning by creating ways for students to comprehend the concept of interpretation, but some of these scaffolds were limited in representing argument writing and historical thinking. The lawyer analogy, for example, might be helpful in highlighting that an argument must be supported by evidence, but it also suggests that students should reject an account (as a lawyer might), rather than contextualize an account (as a historian might) when building an argument. The lawyer must use evidence to win, while the historian must interpret. But scaffolding, by its very nature, involves moving students from simpler to more complex and nuanced understanding. In this sense, these teachers took students’ understanding of evidence into account when making instructional decisions and moved their understanding forward (Lee & Shemilt, 2003).

Researchers and educators familiar with historical thinking may note that these materials do not fully represent the practice of expert historians. Instead, curriculum the materials were designed as an initial step towards expert practice that met the needs of novices, many of whom also struggled with general literacy practices. A longer and increasingly complex intervention (e.g. shift to more than two sources and open-ended questions, encourage students to define their own questions and select their own sources) alongside continued enquiry into the ways in which teachers’ instructional decisions support students’ growth would likely continue many students’ progression toward expert historical thinking. Moving forward, researchers and educators would need to adapt materials so that they meet students’ needs and challenge students to further develop their existing understanding and practices.

And in so much as curriculum is educative for teachers (Davis & Krajcik, 2005), these materials should not stand alone in helping teachers develop more advanced disciplinary understanding. Teacher educators would ideally use materials like these in concert with work on the theoretical underpinnings of historical study and materials for more advanced study to help teachers develop full understanding of historical enquiry that can guide their instruction, regardless of their students’ incoming practices and knowledge. Ultimately, this kind of intervention should be implemented in coordination with others that work towards advanced historical writing and thinking across grade levels, while also supporting teachers’ developing understanding of this work.

**Conclusion**

The call to develop students’ disciplinary literacy is one that affects all subject areas in the USA, especially now in the age of the Common Core. We share how expert teachers attend to students’ disciplinary literacy development when given the tools to do so. We find that teachers’
knowledge of the discipline and students allowed them to adapt the curriculum to better meet students’ needs and push students’ thinking. These teachers took disciplinary literacy tools and used them to develop students’ literacies by paying attention to and responding to students’ ideas. We have much to learn about the kinds of PD experiences that would help a broad range of teachers learn to teach disciplinary literacy. The curriculum teachers worked with integrated reading, thinking and writing in history; identified the links between literacy and content learning and highlighted the importance of disciplinary learning as opposed to simpler learning of facts and details. Orienting teachers toward disciplinary learning, ensuring a foundational understanding of their discipline and providing teachers with tools to teach disciplinary literacy are important steps to help students meet the demands of the disciplinary literacy agenda.

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Notes

1. This finding is based on analysis of their work using both analytic and holistic rubrics and consideration of the length of their papers.
2. Activities important to students’ learning included reading and annotating primary sources, generating plans in advance of composing, and writing essays that attempted to integrate specific disciplinary features such as the explanation and evaluation of evidence.

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Appendix A. IREAD poster

Identify the author and date before you read.
- Who wrote this document? What do you know about him/her?
- Why might the author write this document?
- When was it written? What else was going on at this time that might have influenced the author?

Read the whole document once to figure out the author’s perspective.
- What is the author saying?
- What does the author want or believe?
- How would the author answer the historical question?

Earmark phrases that clued you into the author’s perspective.
- How do you know what the author thinks?
- What words or phrases give the author’s perspective away?

Assess the setting.
- What type of document is this and where did it appear?
- What was the occasion for which this was written?
- Who was the audience?
- Where were these events and authors located?

Detail your evaluation of the document in the margins.
- What are the reasons to trust and doubt this author?
- Is the author in a position to be a good reporter?
- What does the author stand to gain or lose?
- Is the document believable?

...The author might say this to win an election.
Appendix B: Sample Investigation

**WERE DANIEL SHAYS AND HIS MEN REBELS OR FREEDOM FIGHTERS?**

**Document A**

**Head Note:** After the Revolutionary War, some men in Massachusetts were upset with the state government for taxing them so heavily. In 1785, they tried petitioning the government but that didn’t work. In 1786, they began to mob courthouses in order to stop the trials and imprisonment of people in debt. They believed they were fighting for their rights as U.S. citizens. Here Daniel Gray lists the complaints that caused these men to rise up.

Worcester December 7, 1786.

**A speech to the people of the several towns in the County of Hampshire, from a unit of armed soldiers:**

Gentlemen, We have thought it best to tell you of some of the main causes of the recent risings of the people, and also of their actions.

First: There is little money right now. The harsh rules for collecting debts will fill our jails with people who owe money. As a result, many people will not be useful to themselves or the community.

Second: Money from taxes and fees should be set aside to pay off the foreign debt. Instead it is being used to pay off investments that are held by wealthy Americans. Instead of improving our credit, our money is being used to help the rich get richer.

Third: The people who have stepped up to demand rights for themselves and others are likely to be put in jail. They are often put in jails far from home. Now the government will not allow people to petition the court to make sure their imprisonment is lawful. All of this is unlawful punishment.

Fourth: The Riot Act gives unlimited power to Justices of the Peace, Sheriffs, Deputy-Sheriffs and Police Officers and makes it impossible to bring them to court.

Fifth: Be assured that Shays and his followers will get rid of our foreign and domestic debt with the most proper and speedy measures.

Per Order, DANIEL GRAY, Chairman of a Committee for the above purpose.

**Source:** Excerpt adapted from an article written by Daniel Gray and published in the *Hampshire Gazette*, a newspaper in Northampton, Massachusetts. December 7, 1786.
WERE DANIEL SHAYS AND HIS MEN REBELS OR FREEDOM FIGHTERS?

**Document B**

**Head Note:** On January 25, 1787 the men who were involved in Shays’ Rebellion tried to take the weapons stored at the armory in Springfield, Massachusetts. They wanted to change the new government in the U.S. When Abigail Adams wrote to Thomas Jefferson she was in London, and did not yet know about this event. In this letter, she writes about the court mobbings that took place throughout 1786 in efforts to stop trials and prevent debtors from being put in jail.

London January 29th 1787

My Dear Sir:

With regard to the Riots in my home state, which you asked me about: I wish I could say that people have exaggerated them. It is true, Sir, that they have gone on to such a degree that the Courts have been shut down in several counties. The men are ignorant, restless criminals, without conscience or morals. They have led other men under false ideas that could only have been imagined. Instead of that honest spirit which makes a people watchful over their Liberties and alert in the defense of them, this mob of rebels wants to weaken the foundation of our country, and destroy the whole fabric of our nation.

These people are few in number, when compared to the more sensible and thoughtful majority. I cannot help hoping that they will end up helping the state, by leading to an investigation of the causes of these riots. Luxury and wasteful spending of money both in furniture and dress had spread to all of our countrymen and women. This led people to build up debts that they were unable to pay off. Vanity was becoming a more powerful principal than patriotism. The lower classes were unable to pay taxes, even though they owned property. Those who had money were afraid to lend it for fear that the government would take more money from them.

Though late in the month, I hope you will not find it out of season to offer my best wishes for the health, long life and prosperity of yourself and family, or to assure you of the sincere esteem and friendship with which I am Yours,

A. Adams

Source: Excerpt adapted from a letter written by Abigail Adams to Thomas Jefferson on January 29, 1787.
**Appendix C: “How to Write Your Essay” or “H2W”**

**Introduction.** This paragraph should be 3-4 sentences long. Recap the event: (1) give a brief factual summary of the background information (who, what, when, and where) and (2) tell why people disagree about the dilemma or events. (3) Then, write your answer to the historical question.

**Supporting paragraph.** Introduce your strongest reason, quote, or other evidence to support your answer. Then explain what the quote or evidence means in your own words. Third: evaluate the quote or evidence by explaining (1) how reliable the author is, or (2) whether the author’s ideas or evidence is convincing.

**Supporting paragraph.** Choose another reason, quote, or other evidence to support your answer. Then explain what the quote or evidence means in your own words. Third: evaluate the quote or evidence by explaining (1) how reliable the author is, or (2) whether the author’s ideas or evidence is convincing.

**Rebuttal paragraph.** Choose the strongest reason, quote, or evidence that goes against your answer. Then explain what the quote or evidence means in your own words. Third: rebut, or reject the opposing evidence by explaining a problem with (1) how reliable the author is, or (2) the author’s ideas or evidence. Fourth: compare the two documents and explain why someone should choose your perspective over the other perspective.

**Conclusion.** First, write your answer to the historical question using different words from your introduction. Summarize your first supporting paragraph. Summarize your second supporting paragraph. Explain the other perspective but give details why it is not convincing. End with a sentence that tells why the evidence supporting your interpretation is more convincing.
Appendix D: Teacher Questionnaire

Background

1. How long have you been teaching?

2. Have you always taught US history at the 8th grade level? If not, what subjects and grade levels did you teach, and for how long?

3. What experiences, if any, outside of teaching have prepared you for teaching social studies with this public school district?

4. Briefly describe your teacher education (Things to consider- what college or program did you enroll in? How long was your process? What was the focus of your education? When did you complete this program?)

Teaching history and historical thinking

1. What are your goals for teaching history and/or social studies?

2. How would you define “History?”

3. How would you define “historical thinking?”

4. What are the advantages to teaching historical thinking in social studies? What encourages you to teach in ways that support historical thinking?

5. What are the challenges to teaching historical thinking in social studies? What inhibits you in teaching history in this way? What constraints do you find you are faced with?

6. What does it mean to model thinking? What is the role of modeling in teaching historical thinking?

7. What makes a good essay?

8. What do good writers do?

Learning history and historical thinking

1. In what ways do you think your students are prepared for thinking, reading and/or writing about history?

2. In what ways were your students unprepared for thinking, reading and/or writing about history?
3. Students were given the newspaper stories below and asked to think aloud as they read. Read the newspaper stories below and the comment Matt made as he read the second newspaper. Then answer question A-B below.

a. What are Matt’s strengths and weaknesses in reading these two documents?

b. What would your next steps be with Matt if you were his teacher?

**Newspaper #1**

DESTRUCTION OF THE WAR SHIP MAINE WAS THE WORK OF AN ENEMY…NAVAL OFFICERS THINK THE MAINE WAS DESTROYED BY A SPANISH MINE

Assistant Secretary Roosevelt Convinced the Explosion of the War Ship Was Not an Accident…George Eugene Bryson, the Journal’s special correspondent at Havana, cables that it is the secret opinion of many Spaniards in the Cuban capital, that the Maine was destroyed and 258 men killed by means of marine mine or fixed torperda. This is the opinion of several American naval authorities. The Spaniards, it is believed, arranged to have the Maine anchored over one of the harbor mines. Wires connected the mines with a… magazine, and it is thought the explosion was caused by sending an electric current through the wire. If this can be proven, the brutal nature of the Spaniards will be shown by the fact that they waited to spring the mine after all the men had retired for the night…

*Source*: Excerpt from *New York Journal and Advertiser*, February 17, 1898

**Newspaper #2**

MAINE’S HULL WILL DECIDE.

Divers to Find Whether the Force of the Explosion Was from the Exterior or Interior.

WASHINGTON, Feb. 16 – After a day of intense excitement at the Navy Department and elsewhere, growing out of the destruction of the battleship Maine in Havana Harbor last night, the situation at sundown, after the exchange of a number of cablegrams between Washington and Havana, can be summed up in the words of Secretary Long, who when asked as he was about to depart for the day whether he had reason to suspect that the disaster was the work of the enemy, replied: “I do not. In that I am influenced by the fact that Capt. Sigsbee has not yet reported to the Navy Department on the cause. He is evidently waiting to write a full report. So long as he does not express himself, I certainly cannot. I should think from the indications, however, that there was an accident – that the magazine exploded. How that came about I do not know. For the present, at least, no other warship will be sent to Havana.”

*Source*: Excerpt from *New York Times*, February 17, 1898.

**Matt’s Comment**

"Actually, I think it’s kind of interesting, because the first document was saying how all the navy officials were certain that it was a mine and now, I guess the next day, they’re like, oh we didn’t say that. Kind of interesting switch."
4. Read the essay prompt and this student’s essay. Then answer questions A-B (see below).
   a. What are the strengths and weaknesses you notice in Joanna’s essay?
   b. What would your next steps be with Joanna if you were her teacher?

   Essay prompt

   “The explosion of the U.S.S. Maine caused the United States to invade Cuba in 1898.” Use the documents provided and your own knowledge to evaluate this statement. Do you agree with this explanation of the causes of the Spanish American War? Why or why not? Use and cite evidence from the documents to support your analysis of this statement.

   Joanna’s Essay

   The Spanish American War was a good thing, we got Cuba as a territory, we showed everyone that we are not pushovers, and we showed that we are a dominating force in the world. I agree with the causes of the Spanish American War. Many Cubans were being treated badly in camps said to protect the Cubans. The Maine, a proud ship was sunk, sailors with lives were taken by the "treacherous butchers paid by Spain". The sight of four hundred and sixty women and children thrown on the ground, bodies piled along the ground so much that it is impossible to take one step without walking over a body. The Spanish American War was a necessity and was a good thing.

   The truth is, that we are a dominating force in the world today, we control an abundance of land and we are loved by many countries. The fact that we went to war with Spain shows that we can do things for good and not just for ourselves. We can do many things not only for the People of the United States of America but for Cuba, a lonely country needing a defender from the Spanish tyrants. If England, and Germany can govern foreign land so can we.

5. Read and mark-up the following two documents as you consider the question, “Why did the U.S. invade Cuba in 1898?” Then answer questions A-F (see below).
   a. Using the documents, write an argument in one paragraph in response the following question: “Why did the U.S. invade Cuba in 1898?”
   b. How do you know if your answer is right?
   c. Which document was most helpful to you in responding to the essay question? Why?
   d. Which document was least helpful to you in responding to the essay question? Why?
   e. Which document is most trustworthy? Why?
   f. Briefly, outline a lesson you could use with your students that includes any number of these documents.
Document 1: Reconcentration Camps

By the late 1800s, the Spanish were losing control of their colony, Cuba. Concerned about guerilla warfare in the countryside, they moved rural Cubans to “reconcentration” camps where the Spanish claimed they would be better able to protect them. However, people around the world saw newspaper reports that described horrible conditions in the camps for the Cuban people, who were called “reconcentrados.” This account was forwarded to Washington, D.C., by Fitzhugh Lee, U.S. Consul-General in Havana, who said its author was “a man of integrity and character.”

Sir: . . .[W]e will relate to you what we saw with our own eyes:
Four hundred and sixty women and children thrown on the ground, heaped pell-mell as animals, some in a dying condition, others sick and others dead, without the slightest cleanliness, nor the least help.

Among the many deaths we witnessed there was one scene impossible to forget. There is still alive the only living witness, a young girl of 18 years, whom we found seemingly lifeless on the ground; on her right-hand side was the body of a young mother, cold and rigid, but with her young child still alive clinging to her dead breast; on her left-hand side was also the corpse of a dead woman holding her son in a dead embrace . . .

The circumstances are the following: complete accumulation of bodies dead and alive, so that it was impossible to take one step without walking over them; the greatest want of cleanliness, want of light, air, and water; the food lacking in quality and quantity what was necessary to sustain life . . .

From all this we deduce that the number of deaths among the reconcentrados has amounted to 77 per cent.

Source: Excerpt from unsigned enclosure included with telegram sent by Fitzhugh Lee, U.S. Consul-General in Cuba, November 27, 1897. Havana, Cuba.
Document 2: March of the Flag

_Beveridge gave this speech while he was campaigning to become a senator for Indiana. The speech helped him win the election and made him one of the leading advocates of American expansion._

Fellow citizens, it is a noble land that God has given us; a land that can feed and clothe the world; . . . It is a mighty people that he has planted on this soil . . . It is a glorious history our God has bestowed upon his chosen people; . . . a history of soldiers who carried the flag across the blazing deserts and through the ranks of hostile mountains, even to the gates of sunset; a history of a multiplying people who overran a continent in half a century. . . .

. . . William McKinley is continuing the policy that Jefferson began . . .

The Opposition tells us that we ought not to govern a people without their consent. I answer, The rule of liberty that all just government derives its authority from the consent of the governed, applies only to those who are capable of self-government. I answer, We govern the Indians without their consent, we govern our territories without their consent, we govern our children without their consent. . . .

They ask us how we will govern these new possessions. I answer: . . . If England can govern foreign lands, so can America. If Germany can govern foreign lands, so can America. If they can supervise protectorates, so can America. . . .

What does all this mean for every one of us? It means opportunity for all the glorious young manhood of the republic -- the most virile, ambitious, impatient, militant manhood the world has ever seen. It means that the resources and the commerce of these immensely rich dominions will be increased . . .

In Cuba, alone, there are 15,000,000 acres of forest unacquainted with the axe. There are exhaustless mines of iron . . . There are millions of acres yet unexplored. . . .

It means new employment and better wages for every laboring man in the Union. . . .

Ah! As our commerce spreads, the flag of liberty will circle the globe . . . And, as their thunders salute the flag, benighted peoples will know that the voice of Liberty is speaking, at last, for them; that civilization is dawning, at last, for them -- Liberty and Civilization, those children of Christ’s gospel . . .

Fellow Americans, we are God’s chosen people. . . .

Source: Excerpt from Albert J. Beveridge’s Senate campaign speech, September 16, 1898.