Higher Order Thinking in Social Studies: An Analysis of Primary Source Document Use

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*There is a tacit understanding among social studies teachers and educators that incorporating primary source documents in planning and teaching is desirable for many reasons, most prominent among them the ways in which it challenges students to think at higher levels. This study is a descriptive study of public school teachers’ uses of primary source documents in social studies planning, in which we review lesson activities of various grade level teachers to evaluate their use of primary documents for higher order cognitive purposes. Given the salient theme of critical thinking in the literature, we established a baseline continuum of uses that served as our framework for evaluating these activities. We asked the following questions: When history teachers incorporate the use of primary source documents in their planning, to what degree do they promote development of higher level critical thinking? What might a planned activity look like when they do? We found that the majority of the activities examined here employ primary source documents for lower order purposes but held the promise of easy transition to higher order uses.*

*Keywords:* primary sources, higher order thinking, teacher planning, social studies, Bloom’s taxonomy, lesson planning

*Introduction*

There is a tacit understanding among social studies teachers and educators that incorporating primary source documents in planning and teaching is desirable for many reasons. The most prominent among them the ways in which it challenges students to think at higher levels. The call for authentic learning is encapsulated in curricula that would allow students to do at least some of the type of inquiry historians do when they think critically about history through the study of primary source documents. A position statement entitled “The Next Generation of History Teachers,” endorsed by the American Historical Association (AHA) (2006) and sponsored by the Carnegie Foundation and various signatories (historians, social studies educators, and social studies teachers) asserts, “The new history pedagogy emphasizes that teachers need to be able to ‘do history,’ to construct historical narratives and arguments” (p. 4). In other words, it suggests approaching the study of history with a critical mindset thereby promoting higher order applications in classrooms.

If it is true that the critical use of documents in social studies can foster higher order thinking in students, social studies teachers and educators have an obligation to turn a critical eye
to the topic, so that we may offer a straighter pathway to the citizenship goal of the field. The critical use of primary source documents may assist us with the “comprehensive process of confronting multiple dilemmas” and encourage students to “speculate, think critically, and make personal and civic decisions based on information from multiple perspectives” (National Council for the Social Studies [NCSS], 2010, p. 169).

While the benefits of the liberal use of primary source documents (PSDs) in teaching have been argued cogently and for many decades, the barriers that limit their common and effective use appear significant and less understood. With this study, we seek greater understanding of teachers’ decisions about how to incorporate primary source documents in the classroom through examining their planning processes. We submit that one key and frequently overlooked variable in the effective implementation of such documents is the way in which teachers think about them and make decisions about how to use them. In this study we ask the following questions: When history teachers incorporate the use of primary source documents in their planning, to what degree do they promote development of higher level critical thinking? What might a planned activity look like when they do?

**Literature Review**

We begin the review of literature with a discussion of the history of and promise for PSD use in social studies curriculum. We follow this with a review of four key challenges expressed in the literature with using PSDs for higher order purposes. These include epistemological approaches in practice, developmental possibilities and appropriateness, and the realities of teaching toward higher order activities.

**The History of and Promise for Primary Source Document Use**

Lee Ann Potter from the National Archives and Records Administration (NARA) is the special editor of a primary documents section in the flagship social studies practitioner journal *Social Education*. She contends (Potter & Schamel, 2005) that the infusion of PSDs promises opportunities for all manner of higher order functions—heightened critical thinking, the promise of making compelling connections to the past, and the ability to see the subjectivity of history. The concept of “doing history” from this perspective means working with source documents which, in turn, means higher order, more challenging work for students.

The notion that young students of history need to interact with primary source documents is not new. The history of social studies education is threaded through with questions of how history should be taught. From the early history of social studies as a school subject, the infusion of primary source documents in curriculum development and teaching has been an important element of the debate, perhaps best framed by the early deliberations of the AHA Committee of Seven in 1896. The Committee was charged with “fostering more uniformity in the teaching of secondary school history” (Bohan, 2004, p. 76). Lucy Maynard Salmon, a Vassar historian known for her attention to progressive pedagogy, ensured that the final report included the recommendation that courses employ original sources to enhance student understanding (as cited in Bohan, 2004). The report stated: “The use of sources in secondary work is now a matter of so much importance, that it seems to demand special and distinct treatment” (Bohan, 2004, p. 79).

The curricular innovations related by Jerome Bruner in his 1960 work, *The Process of Education*, are further evidence of continued interest in “doing history” (AHA, 2006, p.4) in social studies. Those in the hard sciences and liberal arts were galvanizing to influence inquiry-
based thinking in the public schools. In 1959, Bruner chaired a 10-day meeting convened by the National Academy of Sciences, whose charge was to examine the problem of improving the dissemination of scientific knowledge in the U.S.A. It was the age of Sputnik, and Bruner argued in his recounting of the meeting that, if all students were “helped to the full utilization of their intellectual powers,” the U.S.A. would have a “better chance of surviving as a democracy in an age of enormous technological and social complexity” (p. 10). His proposed curriculum, *Man, a Course of Study* (1960), lauded the infusion of scientific inquiry in social studies as one response to what was deemed a flagging and ineffective national approach to the teaching of public school social studies. To this day, the demand for such treatment continues, as the journal, *Social Education*, has included a designated “Teaching with Primary Documents” section for 15 years. The past several decades have witnessed a renewed and animated exchange concerned with the dearth of document-based learning of history and social sciences in the Kindergarten-12 system (AHA, 2006).

Numerous researchers (Kobrin, 1996; Lee & Ashby, 2000; Seixas, 1994; Shemilt, 1987; VanSledright, 2011) have argued the benefits of incorporating the study of documents in the curriculum, some among them couching their arguments in critiques of textbook-based study of history that postpones student development of historical understanding (Shemilt, 1987), rather presenting an authoritarian, single narrative that denies students the opportunity to think critically about the past (Kobrin, 1996). Others have noted the various sets of important skills that can be developed through the study of PSDs. Sam Wineberg (1991) has described the ability to recognize and comprehend what he calls discerning subtext, “a text of hidden and latent meanings in primary documents” (p. 498). Bruce VanSledright (2011) has argued that document-based learning instills students with critical thinking skills in the evaluation of sources, because it insists on careful reasoning, assessment of evidence, and evidence-based claims, further observing that historical thinking acquired from document-based learning can “restrain, leaven, and hone the process of judgment formation” (VanSledright, 2011, p. 151), allowing students the strategic capability to view all claims with a healthy degree of skepticism.

**Challenges for Teacher and Educators**

Given the historic focus on the benefits of infusing the study of PSDs in the social studies curriculum, one would assume they would be used liberally and effectively in social studies classrooms across the nation. Documents, unfortunately, may be used neither as often nor as effectively as one would hope. Stephen Thornton (2001) argues that content is inert, so educational possibilities must be developed. The literature suggests this is the case with teachers’ uses of PSDs in their planning and teaching, that the skill of using them effectively must be taught and honed. While teachers may value and use PSDs in their classrooms, they may not be using them in ways that promote higher order thinking. In this section, we explore three possible barriers to the successful implementation of PSDs, including teaching history as historical content alone, neglecting the developmental nature of historical thinking, and underemphasizing explicit, skill-based instruction.

**Teaching History as Historical Content Alone.** Perhaps the caché of using documents in planning and teaching has precipitated the all-too-common phenomenon of using documents just for the sake of using documents. O.L. Davis (in Bohan, 2004) suggests that American educators may have a superficial awareness of the “origins of commonplace practices and ideas,” (p. xvii) such as the use of primary source documents in history teaching. They may have only
some vague sense of their value for improving instruction. In discussing curriculum at the elementary level, Keith Barton (1997) noted that, too often, the content of history is divorced from attention to the methods of investigation and creation of knowledge. He asserted, “Students rarely have the chance to collect historical information, examine primary sources, or consider conflicting interpretations” (p. 426).

Peter Seixas (1994) warned that the skill set historians use “may not automatically be transplanted to a body of novices,” whether students or teachers (p. 299), challenging the notion along with others (Barton, 2005) that it is our objective to produce “miniature professional historians,” (Lee & Ashby, 2000, p. 200). It is Barton’s (2005) view that teachers may—in no way—do what historians do when they teach with source documents, and the misconception that teachers can act as historians has consequences. Barton (2005) has argued that the ability of students to routinely and effectively learn about the past through the study of PSDs is a misrepresentation of the role of historians, given the idea natural historical inquiry is far more complex, involving the use of multiple data sources in the process of inquiry. Given the complexity of this process, Barton (2005) has suggested that if teachers are not reflective about source document use, they risk offering educational experiences that are neither historically or pedagogically sound, affirming the notion of the teacher as a key variable in the effective implementation of PSDs, challenging their “special and distinct” place in planning and teaching.

The dilemma is that one of teachers’ epistemological approaches to the teaching of history may be grounded in misconceptions of teaching history as historical content alone, rather than as a serious treatment of knowledge grounded in the process of inquiry that produced it. Peter Lee and Rosalyn Ashby (2000) have affirmed the notion of a shift in history education in Britain from a focus on content to a focus on the discipline of history, where “knowledge is treated more seriously, as something that had to be understood and grounded” (p. 200). Bruce VanSledright and Margarita Limon (2006) also have emphasized the distinction between structural and procedural knowledge with regard to historical knowledge. In his most recent book, VanSledright (2011) asserted that the problem is fundamentally a knowledge problem, not a technical problem of simply how teachers plan or teach. He stated that “smarter kids will require much smarter teachers” (VanSledright, 2011, p. 194), and “all the high-stakes testing and accountability systems in the world will not make more knowledgeable students, if their teachers do not possess the required knowledge to teach them well” (p. 194).

Research in science education (Luera, Moyer, & Everett, 2005) has shown that depth of content knowledge has a direct correlation to teacher’s abilities to design and implement higher order activities. The implication for social studies teachers is that they first need to understand how history is made, that history is more than any particular story it tells. Rather, history is developing “more powerful understandings of the nature of the discipline, which in turn legitimizes the claim that what they acquire is indeed knowledge” (Lee & Ashby, 2000, p. 200). Before teachers can even begin to use PSDs for higher order purposes, they need to value the process of “doing history” along with the content of history, and have deep knowledge that is both structural and procedural.

**Neglecting the developmental nature of historical thinking.** Numerous researchers, among them educational psychologists, have explored the developmental nature of historical thinking skills. This line of inquiry has significant implications for teacher planning and teaching. The findings show a complex developmental process that advocates for the early
introduction and continuous use of PSDs in history education. Denis Shemilt (1987) noted the advantages of exposing students to PSDs at an early stage arguing that early exposure to documents is important, because the historical cognitive awareness of adolescents takes place in stages. Corroborating Shemilt’s (1987) argument, VanSledright (2002) acknowledged the importance of this unique developmental process and attributed the failure to introduce students to documents at an early stage to a misconception that young students are not sophisticated enough to engage in a document-based historical inquiry. In a teacher-practitioner experiment, Van Sledright successfully taught a history to a group of 5th-grade students using an investigative, PSD-rich approach. In the resulting manuscript, he emphasized that K-12 students need not only learn about the history produced by others, but also can and must engage in doing history themselves. Document-based learning instilled his students with critical thinking skills in the evaluation of sources because it insisted on careful reasoning, assessment of evidence, and evidence-based claims.

Lee and Ashby (2000) undertook a mapping project of students’, ages 7 to 14, changes in ideas about history and found that at any given age in this range, students’ ideas about historical explanation varied widely and that progression in ideas about causal structure and rational understanding did not develop in parallel. They found the biggest gains in causal structure in the fifth grade and the biggest gains in rational understanding in the sixth grade. Progression cannot be guaranteed, but can be ensured to greater degree, that “students may have more chance of developing their ideas about history if their teachers have clear ideas, can recognize their students’ starting points, and have strategies for building on them” (Lee & Ashby, p. 215). This finding connects back to the importance of teacher knowledge discussed by VanSledright (2011), affirming that student progression in history education is dependent on teacher structural and procedural knowledge.

Underemphasizing skill-based instruction in planning and teaching. The promotion of critical thinking through the effective use of primary source documents is both desirable and developmentally appropriate but difficult to instill. Usage of PSDs pedagogically and historically sound ways is complicated. One of the key challenges is the complexity of “designing tasks and interpretive strategies that are practicable for the classroom” (Seixas, 2011, p. 152). He argued for more than a “cursory nod” (Seixas, 2011, p. 140) to goals for historical thinking in the planning process, so that objectives for such would be explicit, clearly articulated, and directly assessed. The important, yet elusive nature of critical thinking is described by Bain (2000): “Stimulating students’ critical thinking is a cherished goal. It has provided an element of agreement in the contentious storm surrounding United States National History Standards” (p. 333). Bain posited that while there is agreement about achieving critical thinking with our students, its rigors must be carefully taught.

Barry Beyer (2008a) has written extensively about what he calls “thinking skills” in the teaching of social studies and history and has addressed our persistent lack of success with promoting such skills with our students. Having conducted a significant review of the research on teaching thinking skills, Beyer (2008b) recommended a more direct focus on explicitly teaching the skills. Such a focus includes teaching thinking procedures, rules, and information; making the skills explicit; introducing each new skill in a lesson focusing on that skill; and guiding and supporting continuing practice. In his capacity as both social studies teacher and historian, Bain (2000) experimented with translating the critical thinking skills of the historian to
usable skills for the high school social studies student. His rationale in doing so was to “engage students in historical cognition without yielding to the tempting assumption that disciplinary tasks mechanically develop students’ higher functions” (Bain, 2000, p. 335). With this caveat, he was able to scaffold processes in ways that matched his students’ developmental abilities.

There is a long history of ardent advocacy for the inclusion of documents in the social studies curriculum and a strong rationale addressing the promises and possible pitfalls, as well as numerous cogent arguments for how this may be accomplished. The cornerstone of this rationale is the promotion of critical thinking through a solid skill set and deep historical knowledge, both structural and procedural. We know that students can and should think in these ways and that how teachers choose to use documents is a key variable. We begin this inquiry with the planning process, by questioning the degree to which teachers incorporate higher order activities with the use of source documents.

The Study

This is a descriptive study of public school teachers’ uses of source documents in social studies planning in which we review lesson plans of various grade level teachers to evaluate their use of primary documents in teaching history. An acknowledged critical element of the teaching process is the ability to “systematically organize a useful learning process” (Darling-Hammond & Ducommon, 1999, p. 3). The planning process should provide a foundation for effective implementation. Impacts of planning are further enhanced when there is school district/building commitment to providing teachers with regular, collaborative planning time (Darling-Hammond & Ducommon, 1999). We chose to evaluate the planning process exclusive of implementation as a first step in understanding the complete process. We have chosen to examine teacher planning alone because we subscribe to the notion that planning can have a significant impact on teaching, so considering one’s planning is an essential element of promoting innovations in teaching. We submit that innovations in teaching cannot happen without careful planning deliberations. Creators of the Backwards Planning model, Wiggins and McTighe (2005), argue examining planning is essential to improving teaching. Meaningful teaching experiences emerge from thoughtful, purposeful planning processes. Understanding the ways in which teachers plan to use documents will inform our practice and help dispel myths posing barriers to the powerful and authentic use of documents in the teaching of social studies.

Theoretical Framework

The notion of critical thinking is a core concept that undergirds the numerous organizations that have a stake in such a question as ours. The National Council for the Social Studies (2010) calls students to “speculate, think critically, and make personal and civic decisions based on information from multiple perspectives” (p. 169). Some (Potter and Schamel, 2005) have argued that students engage with documents so they can think critically and see the subjectivity of history. The AHA (2006) calls for a new history pedagogy emphasizing that teachers need to be able to “‘do history,’ to construct historical narratives and arguments” (p. 4). The historical thinking standards developed by the National Center for History in Schools (NCHS) (1986) call students to analyze, interpret, predict, and entertain multiple perspectives. All of these are elements of critical thinking. For the purposes of this study, we define “critical thinking” as an art, that of “analyzing and evaluating thinking with a view to improving it” (Paul & Elder, 2008, p. 4). Well-cultivated critical thinkers are self-directed, self-disciplined, self-
monitored and self-correcting. They also have a range of skills from raising vital questions, gathering relevant information, coming to well-reasoned conclusions and solutions that are tested, thinking open-mindedly within alternative systems of thought, and communicating effectively with others in figuring out solutions to complex problems. Critical thinking is related to “higher-order thinking,” as described by the American educational psychologist Benjamin Bloom (1956), who posited that education objectives could be organized according to their cognitive complexity. This proposition was that not all educational outcomes have the same merit, and functions of thinking can be classified as higher and lower order, with further classifications within these categories. Ultimately, Bloom and his team (Krathwohl, Bloom, & Masia, 1973) described three lower order functions (remembering, understanding, and applying) and three higher order functions (analysis, evaluation, and creation). For our purposes “critical thinking” is a process, and “higher order thinking” is the objective we aspire to through that process.

The National Center for History in Schools (NCHS) (2000) has identified five elements of historical thinking, with numerous criteria that define each of the five categories. To evaluate teacher activities, we selected six from among the criteria that defined these categories that were most closely related to the use of source documents. These included creating a chronology, “sourcing documents,” documenting point of view, questioning past decisions/historical inevitability, testing historical interpretations, and providing multiple viewpoints. One of the authors had previously conducted an analysis of teacher uses of source documents, so we have included some categories that emerged from that study, including teaching general content knowledge, generating evidence from which to take sides in an argument, and relating to people of the past.

We located each of these criteria along the revised Bloom’s Taxonomy continuum (Anderson et al, 2001) that includes six hierarchical categories, ordered from the simplest to the most complex task: remember, understand, apply, analyze, evaluate, and synthesize (Anderson et al, 2001). The first three are considered lower order functions and the last three are higher order (see Appendix).

Background

The teachers who provided activities for this study represent a sampling of social studies teachers from numerous school districts in north-central Ohio who self-selected to participate in a set of workshops sponsored by a Teaching American History project. The 21 elementary, middle, and high school teachers with whom we worked came from five different rural school districts (student population under 4,000) and had a range of teaching experience from 3 to 35 years.

The grant proposal for the project was written by historians and administered in conjunction with a local presidential library, where all workshops were held. Goals were specific to content acquisition, and ongoing evaluations of the program revealed teacher satisfaction with the content-rich nature of the program, particularly from the elementary teachers. Though the workshops did not provide teachers with specific formal training in the use of source documents in planning and teaching, document usage had been modeled by visiting historians, and the planning process was debriefed in each afternoon session over the course of the spring and summer workshops. Teachers also were asked to create a document-based activity as a product of these afternoon sessions. As there were no pedagogical sessions
targeted on the infusion of PSDs, this was a unique opportunity for the researchers to understand how the average teacher, with little to no explicit training in the use of source documents, would choose to use them. Two of the authors were directly involved with the grant-funded program, one as the evaluator and the other as a graduate research assistant. Neither was involved at any point in development of the workshop curricula.

Data Collection and Analysis

At the end of the summer institute, all teachers who were receiving university credit for the workshop were asked to create a document-based lesson activity as part of the evaluation requirements of the grant-funded program. The teachers were asked to include more than one document in their planning, align the activity with state standards, and provide copies of the documents they incorporated. We collected lesson activities from 21 of the 33 participating social studies teachers—11 elementary, 6 middle school, and 4 high school—and created pseudonyms for each participant.

The first step in analyzing the data was to create an activity analysis continuum from the NCHS criteria, items from the pilot study, and elements of Bloom’s taxonomy. The continuum included a list of historical thinking skills aligned along the continuum of higher to lower order objectives as described by Bloom (see the Appendix). Two researchers initially scored several lesson activities together to norm the continuum. They categorized the activities and revised the definitions that distinguished each category. Following this joint process, the three researchers worked independently to score all 21 activities using the Activity Analysis Continuum (Appendix). Once the activities were individually scored, all three convened on three separate occasions to further analyze the categorizations together. During the group analysis, the authors continued to revise categories and expand their definitions, verifying the Continuum with numerous member-checks.

The authors came to consensus on a finalized continuum (Appendix) and on the final categorization of each activity. The highest level attained by an activity became its final categorization. If an activity incorporated a lower order skill (e.g., sourcing) in preparation for a higher order skill (e.g., comparing divergent perspectives), the activity was coded as higher order. Activities were categorized as promoting higher order thinking if they reached the fourth (analysis), fifth (evaluation), or sixth level (creation) on Bloom’s taxonomy. Activities were ultimately rated as either promoting or not promoting higher order thinking with the use of source documents. To answer the second research question, “What might a planned activity look like when they do?” the authors examined a set of higher order and lower order activities and compared their treatment of PSDs.

Findings

We first address the question of the degree to which the sample teachers incorporated critical thinking at higher levels in their planning. Next, we turn to what a planned activity looked like when they incorporated higher-level thinking and offer a more in-depth look at some examples of both higher and lower order activities. A comparison of these tasks gave us a more concrete view of what teachers planned to do to promote higher order thinking.

Degree of Higher Order Usages of Source Documents

Of the lesson activities, 38% (8 out of 21) were categorized as higher order and 52% (13 out of 21) as lower order. The most common categorization was the lower order skill of
“application,” with 10 out of 21 (48%) of activities rated at this level. High school activities far outweighed elementary and middle school activities for higher order designation, with 80% of high school, 27% of elementary, and 20% of middle school activities characterized as higher order (Table 1). In all cases but one, there was a clear building process in the lesson procedures, where, in order to reach evaluation, for example, teachers also had their students performing tasks that required recall, understanding, application, and analysis (Table 2).

Table 1
Final Activity Categorization by Percentage

<table>
<thead>
<tr>
<th></th>
<th>Recall</th>
<th>Understand</th>
<th>Apply</th>
<th>Analyze</th>
<th>Evaluate</th>
<th>Create</th>
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To answer the second research question, “What are some examples of lower and higher order uses of source documents in teacher planning?” the we discuss several examples of lower order and higher order lesson activities.

Table 2
Activity Challenge Levels

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Sample Lower Order Activities

All the teachers with lower order activities had students using recall and understanding in their activities. The teacher either planned to ask students to read source documents or to source them without any further use. Several teachers operating only at the recall and understanding stages defined their objectives as learning about life during the Civil War by reading primary documents. An elementary grade activity, on “The Lake Erie Conspiracy of 1864,” remained at the recall and understanding levels. The documents used for this activity included photographs of people, locations, military vessels, and written correspondence. In this activity, the teacher emphasizes students gaining knowledge when she writes that her first goal is to acquaint students with the people, locations, and events surrounding “The Lake Erie Conspiracy of 1864.” There is movement from knowledge to the comprehension level when her second goal focuses on students being able to retell the events and outcomes of “The Lake Erie Conspiracy of 1864.” There was no attempt to go beyond retelling and summarizing the events of the local conspiracy.

A sixth-grade lesson on “Biographies of Fostoria Civil War Veterans” required students to visit a cemetery to gain knowledge about a Civil War veteran. Despite the interesting activity of visiting a cemetery, the lesson did not go beyond recall and understanding. At the cemetery, students were to participate in a walking field trip during which they would be given index cards with a veteran’s name on it. Their task was to find the veteran’s headstone. Beyond locating the headstone, there were no specific activities or questions that would have had students applying this knowledge to make deep personal connections with the veterans buried in the cemetery.

All but three teachers used application in their documents. An example of application comes from Callie, a middle school teacher, who developed an activity entitled “The Johnson’s Island Experience.” Her activity focuses on students exploring living conditions of confederate prisoners of war at Johnson’s Island Prison camp by examining primary sources. In this activity, students are to be given a reading packet that includes an overview from the Johnson’s Island official website, two letters from prisoners, excerpts from a diary of a prisoner, and photos of the prison camp. The major component of this assignment is students’ completion of a project on the living conditions of the prisoners at Johnson’s Island. This activity enters the application realm, because students are making personal connections with people of the past through this project. It begins with a pre-assessment in which students write one-minute papers on what they know about Johnson’s Island and Civil War prisoners in general. The culminating activity further uses application, as students are asked to compare and contrast their initial ideas of Civil War prisons with primary accounts. Though students are making personal connections, there is no real evidence of analysis, so it remains a lower order thinking activity.

Sample Higher Order Activities

Ten out of 21 teachers engaged students in analysis, the first level of higher order thinking. It is clear something different is occurring when teachers start to move beyond lower order thinking skills. One elementary teacher, Jennifer, began her activity entitled, “The Underground Railroad in Sandusky, Ohio” at the application level, writing:

Students sometimes struggle to understand how past historical events have any relevance to them living at a time far removed from what they are learning. It is my intent that this
lesson enables them to see a direct correlation of past and present, and how the same city that they are growing up in had noteworthy impact on slaves escaping to freedom by way of the Underground Railroad. . . . They will come to understand that places they pass on their way to the bus stop, and various houses and buildings that they’ve seen time and time again, played a part in history.

As part of this activity, the teacher required students to use maps, documents, the Internet, and photos to research Sandusky, Ohio’s role in the Underground Railroad. In addition, she required students to read and listen to slave narratives. Application is clearly part of this activity, because the teacher emphasizes personal connections not only with the students’ own community and local historical events, but also with local community members who were abolitionists during the Civil War period. This lesson does not stop at application. The teacher stresses higher order thinking skills by having students consider whether or not they would have been part of the Underground Railroad and offer assistance to runaway slaves. The teacher presents this problem in a structured way by having students compare points of view and analyze the pros and cons. Students interpret events. She also asks her students to analyze information by comparing points of view. They would be asked to analyze the relationship between freed slaves and illegal immigrants in today’s society and form an opinion, thereby engaging them in critical analysis of their own perspectives.

Though there were several examples of teachers moving to the evaluation and creation levels, there are three exemplars. One example comes from the activity created by Olivia, a middle school teacher, on “The Role of Women in the Civil War.” Before students reach the level of evaluation, they are first heavily involved in analyzing documents by comparing points of view and testing historical interpretations of the various roles women played during the Civil War. Not only do students compare and contrast, but the teacher also has students write responses in support of or opposition to their actions and whether they demonstrate the qualities of a hero. Students move beyond analysis into evaluation because they are determining the worth or value of something based on criteria and evidence. As the teacher writes, her goal is for students to “realize there are several stories to examine in every event in history, and by looking at women in particular, students are able to see that although they may not have necessarily been fighting battles, the Civil War had a huge impact on the lives of all Americans” (Olivia). The emphasis is, therefore, on determining the worth and value of a segment of the population not always given much attention when studying the Civil War. Students are further involved in evaluation by examining other conflicts, such as the war in Iraq, considering multiple perspectives on events. This activity, however, does not reach the highest level, as students are not being asked to create something new.

Although the activity above is an example of higher order usage of source documents, only two of the 21 activities that reach the creation phase. One of these two activities comes from a middle school teacher, Mia, whose topic was the military draft. The other activity was excerpted from a high school unit on the legitimacy of wartime tactics from Kyle. The title of the middle school activity, “Uncle Sam Wants You! Or It’s a Rich Man’s War and a Poor Man’s Fight?” implies evaluation, because it raises a provocative question requiring students to evaluate and judge. The focus of this activity is the Civil War draft riots of 1863. Students become familiar with the riots by having them read primary source documents describing the street violence connected with the riots. The activity is framed with a series of critical questions, such
as: “What socio-economic implications were there in the draft? Why was it needed? What does this mean...‘Rich man’s war and poor man’s fight?’” At this point in the activity, recalling knowledge is secondary, as the emphasis lies in higher order thinking skills requiring students to consider class issues surrounding the draft. The teacher pushes students to the evaluation stage because they are collecting evidence from which to take a side in an argument in order to provide their opinions on these questions. Students question past decisions and historical inevitability about the draft during the Civil War. The teacher additionally has students progressing to the creation stage by encouraging them to come to a new conclusion based on evidence with a culminating activity of a mock draft. This is a solid example of creation. In her lesson activity, Mia wrote, “From prior knowledge, students should ask if they can find a substitute for the draft;” therefore, students are using a new framework to view the past and trying to create alternatives.

The other activity that reaches the creation stage is from a high school teacher named Kyle, titled, “An Examination of Multiple Perspectives on Strategy Towards Civilians in War: The Case of Sherman’s March.” Kyle indicates that though students are examining three primary documents specific to Sherman’s March, the larger issue is that of conduct in war. This statement points to the emphasis on analyzing and interpreting historical events and comparing them to the present and is the central focus. Kyle also writes how war tactics continue to be controversial; “Students will be exposed to multiple perspectives in an attempt to provide them with adequate information to understand the salient moral and strategic issues surrounding this debate.” He further states, “The key is to incorporate sources that provide a particular point of view and support or reject the morality of the events on the ground. In this way the students can be exposed to many points of view and have the evidence on which to support their own views as they develop.” Students are at the evaluation stage when they are asked to collect evidence from which to take a side in an argument and determine the worth or value based on criteria. Kyle asks students to connect the Civil War with the modern “War on Terror,” and asks, “for students to examine [Sherman’s policies] as a complex moral strategic and policy issue.” As a closing activity, students are instructed to place this event within the context of the larger issues of civilians during wartime. He writes, The U.S. dealt with these same issues throughout the last century in debating such issues as strategic bombing in WWII, nuclear deterrence during the Cold War, village policies during Vietnam, and issues of detention and torture that currently dominate the moral debate surrounding the ‘War on Terror.’ Kyle, like Mia, reaches the creation stage by having students come to a new conclusion and put together information in a new and different way.

Conclusion and Implications

The place of “special and distinct treatment” Lucy Maynard Salmon (see Bohan, 2004, p. 79) reserved for PSDs in the teaching of history is in place to varying degrees amidst the activities these teachers have created, with activities ranging widely along the continuum and showing the most marked variation between the elementary and secondary grades. When these teachers incorporated the use of documents in their planning, most secondary teachers, and many others came close to using documents in higher-order ways. The data and examples presented here are compelling. They indicate it is teacher use of primary source documents that is the
critical variable in whether or not the documents are implemented for higher order purposes. The incorporation of primary source documents cannot, in and of itself, promote higher-level cognition.

The findings both affirm and challenge suppositions presented in the literature that the use of primary documents can foster higher order thinking (Korbin 1996; Potter & Schamel 2005; Shemilt, 1987; VanSledright 2002). As to the notion that teachers may have a superficial awareness of the “origins of commonplace practices and ideas” (Bohan, 2004, p. xvii), such as the use of PSDs in history teaching and may have only some vague sense of their value for improving instruction, the findings suggest that this is indeed the case for a number of the sample teachers. While these teachers collected interesting documents for their students’ use, they rarely went beyond the lower order uses of recall, factual understanding, and narrative construction in their planning. Activities coded as lower order were not a large majority of the sample, however, at 52%. Further analysis showed that among the activities coded as lower order, many (48%) included activities asking students to go beyond recall and basic understanding of events to apply what they had learned.

In the elementary teacher’s “The Lake Erie Conspiracy of 1864” activity, the students go through the lower order processes of recalling and ordering facts and sourcing documents so that they might recount events. The teacher easily could have asked students to apply and analyze a number of aspects of the event. The conspiracy centered around John Beall, who planned to overtake a steamer and surprise the crew on the USS Michigan to free the confederate prisoners held on Johnson’s Island. Though accounts vary, one account says that a 17-year-old girl, Mary Stephens, overheard the conversation of the plan and tipped off the authorities. Primary documents for the lesson included photos of people, military vessels involved in the affair, and written correspondence. Activities such as these easily might have been strengthened by more intentional reflection on the objective of the lesson.

The comparison of lower order to higher order activities highlights that the only distinction between them is a matter of degree, in that all teachers who challenged students to higher levels built upon lower level skills to achieve beyond them. The implication is that, as stated in the review of literature, some teachers simply may have a superficial awareness of the common practice of using source documents to teach history (Bohan, 2004) and faced barriers to higher order implementation. In the cases of these activities, it was not the documents themselves but the way in which they were used that determined the level of cognition in the activity. Possible barriers to higher-order uses were teachers’ epistemological approaches to the content; their views of students’ developmental abilities; and explicit, skill-based instruction.

A challenge to the notion that use of primary documents can foster critical thinking is the dramatic difference between elementary, middle and high school activities. A far greater number of high school activities were coded as higher order (80%) in comparison to both elementary (27%) and middle school activities (20%). What can explain this difference? Is this fundamentally a knowledge problem, as some suggest (Lee & Ashby, 2000; VanSledright, 2011), and if so, of what types of knowledge? The literature suggests that social studies teachers need deep knowledge that is both structural and procedural (Lee & Ashby, 2000; VanSledright, 2011) before they can undertake successful planning.

A second factor for explaining this difference could be that high school teachers expect older students to be more developmentally capable of higher-order thinking and plan
accordingly. The literature shows historical thinking skills as a complex developmental process advocating and arguing for the promise of early introduction and continuous use of PSDs in history education (Shemlit, 1987; VanSledright, 2002). The literature further indicates that student progression with historical thinking skills is dependent on teacher structural and procedural knowledge (Lee & Ashby, 2000).

Finally, explicit, skills-based instruction in higher order thinking (Bain, 2000; Beyer 2008a, 2008b) was not present in the professional development curriculum from which these activities were a product. The literature on the developmental nature of historical thinking as well as that on teaching thinking skills indicate an intentional, carefully scaffolded, and transparent approach is needed. Future studies and professional development for both pre-service and practicing teachers should attend to such scaffolding as well as pre-assessing various forms of teacher content knowledge and addressing misconceptions teachers may have about student intellectual and developmental capabilities.

We duly note that the study posed several limitations, including no knowledge of whether or how well these plans were implemented. We have no notion as to the frequency of these teachers’ incorporation of PSDs in their planning and teaching. These plans may represent unique attempts of some of these teachers to infuse PSDs in planning and may or may not have been taught even one time, let alone incorporated into teachers’ planning routines. A distinct possibility is that what these teachers would actually do with their students might be far less ambitious than the plans presented here. We also know that impacts of planning are further enhanced when there is school district/building commitment to providing teachers with regular, collaborative planning time (Darling-Hammond & Ducommon, 1999). A social studies department focus within a given building on inquiry-based planning and teaching would likely ensure the frequency and quality of implementation, but in this study, the context to which teachers returned to teach was unknown. Since the teachers were all from five rural school districts in north-central Ohio they may present a unique orientation. As such, further inquiry could include random sampling as well as the study of relationships between teacher planning, implementation, and assessment through interview and observation.

The implication is that more formal, purposeful professional development in lesson planning for higher order uses with documents has promise. The complicated process of incorporating source documents in lesson planning is not intuitive and automatically higher order. Examining the planning processes of teachers with little to no exposure to purposeful planning with documents represents the state of such planning in the field to some degree, and highlights what more we can do, and need to do, in professional development. Studies examining the impacts of targeted workshops on both planning and implementation would advance our understandings and likely advance the “new history pedagogy” in tangible ways.

With the alleged importance of the use of documents in social studies teaching, it is also important to learn that some teachers are planning to use documents in powerful, standards-based ways. The analysis both proves and disproves Barton’s (2005) argument that the source document focus is overrated. While some activities in this study indicate planning for rote usage of documents, others are evidence of just the opposite. Teachers appear to have less difficulty choosing documents in their planning than they do incorporating them to their full potential as critical thinking tools.
References


Luera, G. R., Moyer, R., & Everett, S. (2005). What type and level of science content knowledge of elementary education students affect their ability to construct an inquiry-based science lesson? *Journal of Elementary Science Education* 17(1), 12-25.


**Web-Based References**


## Appendix

### Lesson Activity Analysis Continuum

<table>
<thead>
<tr>
<th>Definition</th>
<th>Action Words</th>
<th>Elements of Historical Thinking</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recall</strong></td>
<td>Recognizing</td>
<td>-“Source” a document</td>
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<tr>
<td>Retrieving relevant knowledge from long-term memory</td>
<td>Recalling</td>
<td>-Recalling facts from the past</td>
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<tr>
<td></td>
<td></td>
<td>-Defining terms</td>
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<td></td>
<td></td>
<td>-Learning facts about the past</td>
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<tr>
<td><strong>Understand</strong></td>
<td>Interpreting,</td>
<td>-Summarize events</td>
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<tr>
<td>Determining the meaning of instructional messages, including oral, written</td>
<td>exemplifying,</td>
<td>-Build chronology</td>
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<tr>
<td>and graphic communication</td>
<td>classifying,</td>
<td>-Describe experiences of people of the past</td>
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<tr>
<td></td>
<td>summarizing,</td>
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<td></td>
<td>inferring,</td>
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<td></td>
<td>comparing,</td>
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<tr>
<td></td>
<td>explaining</td>
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<tr>
<td><strong>Apply</strong></td>
<td>Executing,</td>
<td>-Identify point of view</td>
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<tr>
<td>Carrying out or using a procedure in a given situation</td>
<td>implementing</td>
<td>-Make personal connections to people of the past</td>
</tr>
<tr>
<td></td>
<td></td>
<td>-Make connections from past to present</td>
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<tr>
<td><strong>Analyze</strong></td>
<td>Differentiating,</td>
<td>-Test historical interpretations</td>
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<tr>
<td>Breaking material into its constituent parts and detecting how the parts</td>
<td>organizing,</td>
<td>-Compare points of view</td>
</tr>
<tr>
<td>relate to one another and to an overall structure or purpose</td>
<td>attributing</td>
<td></td>
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<tr>
<td><strong>Evaluate</strong></td>
<td>Checking,</td>
<td>-Collect evidence from which to take sides in an argument</td>
</tr>
<tr>
<td>Making judgments based on criteria and standards</td>
<td>critiquing</td>
<td></td>
</tr>
<tr>
<td><strong>Create</strong></td>
<td>Generating,</td>
<td>-Question past decisions/historical inevitability</td>
</tr>
<tr>
<td>Putting elements together to form a new, coherent whole or make an original</td>
<td>planning,</td>
<td>-Use collected</td>
</tr>
<tr>
<td></td>
<td>producing</td>
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product
evidence to construct an argument
-Come to a new conclusion
-Use new frameworks for viewing the past


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