**Appendix A: Central Texts and Links**

* Zell, Fran. *A Multi-Cultural Portrait of the American Revolution*. New York: Benchmark Books, 1996. (included)
* Zinn, Howard. *A Young People’s History of the United States*. Seven Stories Press, 2007. (included)
* Heroes of the Revolution React to Shays’ Rebellion <http://www.calliope.org/shays/shays2.html>
* Signers of the Declaration of Independence <http://www.ushistory.org/declaration/signers/>
* Outline and Summary of the Articles of Confederation [http://www.sonoma.edu](http://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CDAQFjAA&url=http%3A%2F%2Fwww.sonoma.edu%2Ftah2%2Flessons%2Fjolly%2Flessons_2008%2Foutline_and_summary_of_the_articles_of_confederation.doc&ei=1j-3UdCPGdK44AOX2IDoDA&usg=AFQjCNFtqhAPxAoQGCcVPbIqGveBZbPXOQ&sig2=de-_r1czClIle7c3Tbkx6A&bvm=bv.47534661,d.dmg)
* An Address to the People by Daniel Gray of Pelham <http://shaysrebellion.stcc.edu/shaysapp/artifact.do?shortName=gazette_dg27dec86>
* Shays’ Rebellion texts and resources available at Springfield Technical Community College

<http://shaysrebellion.stcc.edu/shaysapp/artifacts/home.do>

* Letters and diaries: <http://shaysrebellion.stcc.edu/shaysapp/artifact/category.do?ID=5>
  + - \*David Hoyt to his Father, Regarding Shays' Rebellion (from a young man defending the Springfield Armory)
    - \*Excerpts from the Journal of Park Holland (who served under General Lincoln in pursuing Shays)
    - \*William Shepard to James Bowdoin Regarding Events at the Arsenal – January 26, 1787
    - Excerpts from the Journal of Sarah Howe, volume 1
    - Ebenezer Mattoon to Thomas Cushing Regarding Henry McCulloch
    - George Washington to Benj. Lincoln Regarding "these commotions" – February 7, 1787
    - Henry Knox to Jeremiah Wadsworth Regarding the "Insurgency"
  + Official documents: <http://shaysrebellion.stcc.edu/shaysapp/artifact/category.do?ID=4>
    - Governor’s Proclamation of September 2, 1786
    - Order for execution of Job Shattuck - May 28, 1787
    - Proclamation to apprehend Daniel Shays and others – February 9, 1787
    - Proclamation of John Hancock -- June 1787
    - Commendation for William Shepard – February 5, 1787
    - Henry McCulloch Death Warrant – April 9, 1787
  + Books newspapers, periodicals: <http://shaysrebellion.stcc.edu/shaysapp/artifact/category.do?ID=2>
    - An Address to the People by Daniel Gray of Pelham
    - Extract of a Letter Urging Stern Measures Against Rebels
    - Gazette Report on Militia and Regulator Movements – January 24, 1787

**Lesson 1 - Excerpt from Howard Zinn’s *A Young People’s History of the United States***

Whose Independence?

Every harsh act of British control made the colonists even more rebellious. By 1774 they had set up the Constitutional Congress. It was an illegal political body, but it was also a step toward independent government…Throughout the colonies, there was already a strong feeling for independence. The opening words of the Declaration gave shape to that feeling:

We hold these truths to be self-evident, that all men are created equal, that they are endowed by their Creator with certain unalienable Rights; that among these are Life, Liberty and the pursuit of Happiness – That to secure these rights, Governments are instituted among Men, deriving their just powers from the consent of the governed – That whenever any Form of Government becomes destructive of these ends, it is the Right of the People to alter or abolish it, and to institute new Government…”

But the Declaration did not include Indians, enslaved blacks, or women. As for Indians, just twenty years earlier the government of Massachusetts has called them “rebels, enemies and traitors” and offered cash for each Indian scalp.

Black slaves were a problem for the authors of the Declaration. At first, Jefferson’s Declaration blamed the king for sending slaves to America and also for not letting the colonies limit the slave trade. Maybe this statement grew out of moral feelings against slavery. Maybe it came from fear of slave revolts. But the Continental Congress removed it from the Declaration of Independence because slaveholders in the colonies disagreed among themselves whether or not to end slavery. So Jefferson’s gesture toward the enslaved black was left out of the Revolution’s statement of freedom.

“All men are created equal,” claimed the Declaration. Jefferson probably didn’t use the word “men” on purpose, to leave out woman. He just didn’t think of including them. Women were invisible in politics. They had no political rights and no claim to equality.

By its own language, the Declaration of Independence limited life, liberty, and happiness to white males….The reality behind the Declaration of Independence was that a rising class of important people in the colonies needed enough support to defeat England. At the same time, they didn’t want to disturb too much of the settled order of wealth and power. In fact…more than two-thirds of the men who signed the Declaration of Independence had served as colonial officials under the British. p.63-66

The Constitution – Business as Usual

Many Americans have seen the Constitution as a work of genius, put together by wise men who created a legal framework for democracy and equality. But there is another way to look at it.

In 1935, historian Charles Beard put forward a view of the Constitution that angered some people. Beard studied the fifty-five men who met to write the Constitution. He found that most were wealthy. Half of them were money-lenders, and many were lawyers. They had reasons to create a strong federal, or central, government that could protect the economic system that they understood and were part of. Beard also noted that no women, blacks, indentured servants, or people without property helped write the Constitution. So the Constitution did not reflect the interests of those groups…

Were the Founding Fathers wise and just men trying to create a balance of power? They did not want a balance, except one that kept things as they were. They certainly did not want an equal balance between slave and master, rich and poor, or Indian and white. Half of the people in the country were not even considered by the Founding Fathers. These “invisible” citizens were the women of early America.

Zinn, Howard. *A Young People’s History of the United States*. Seven Stories Press, 2007. p.80-84.

**Lesson 1 –**

**Excerpt from *A Multi-Cultural Portrait of the American Revolution* by Fran Zell**

In the summer and fall of 1781, several thousand slave men, women, and children followed British General Charles Cornwallis through Virginia to the little tobacco port of Yorktown. Their already difficult lives had been turned upside down by fighting that had burned homes and crops and sent many of their owners fleeing for safety. Everyone was suffering from food and clothing shortages, but slaves suffered most because they had so little. Many were starving and half-naked when the British came through, promising freedom.

Cornwallis's troops plundered as they marched. They ate food in their path like a swarm of locusts. Slaves went through closets in deserted plantation houses, helping themselves to fine clothes. They may have been turning the tables on their owners, but more likely they were trying to stay warm. They divided the finery so that one man could be seen wearing nothing but silk breeches and another an elegant shirt, while the woman beside him sported a lounging robe with a long train or a silk corset. Others fancied hats and wigs.

The parade ended sadly, however, with a long siege at Yorktown in October. The British and their Black followers were surrounded by a large force of American and French soldiers. The Africans serving the British worked to fortify Yorktown from attack. Throughout the long march, they had been nurses, maids, cooks, and orderlies, scrounging food for the big army. But as supplies and hopes dwindled, the British sent many Blacks away, back to slavery and punishment by their masters. Many died of illness in Yorktown.

The British surrendered on October 19, 1781, after nearly three weeks of siege. A new government rose to power in England five months later, and with much of the South now in ruins, the English had little interest in continuing the war. They needed to save the rest of their empire from the French and the Spanish. In April, peace talks between England and American representative s began in Paris. The fighting continued sporadically back home, but there were no more major battles. The war officially ended on September 3, 1783, when the peace treaty was signed.

In addition to sheer perseverance on the part of the American forces, other factors helped the ragtag revolutionaries overcome incredible odds to defeat the mighty British. For example, although the colonies were of great importance to the English, they had other holdings, such as India, that were much more profitable. In addition, the French, Spanish, and Dutch had joined the American side against their rival, England. Their combined might, particularly the sea power of the French and Spanish, was impressive. It helped the British realize that if they kept up their fight in America, they could well run the risk of keeping the colonies but losing their home island. And because they retained what is today eastern Canada, the British did not feel utterly defeated.

**Diverse People with a Common Dream**

After the war, America remained a land of numerous ethnic and religious backgrounds, many slaves, indentured servants, women, American Indians, free Blacks, and men with neither property nor the right to vote. It was still a land of many contradictions -a place where a poor man could obtain riches, as well as one where only a small number of people held great wealth. But it was also a land that had fought a war based on notions of equality and liberty for all.

Although many people did not yet have equal rights and freedom, there were few people at war's end who were unaware of the country's principles. It was this knowledge more than anything else that eventually helped unite Americans into one nation. It was also this knowledge that helped empower each oppressed group eventually to speak out for its rights

**New Paths to Black Freedom**

Though the British betrayed the Blacks who followed them to freedom, they did keep their promise to thousands who had joined their ranks during the war. It is estimated that at least fourteen thousand African-American men, women, and children left with the British soldiers who returned to England.

They sailed from Savannah, Charleston, and New York City to new lives in Florida, Canada, the West Indies, Europe, and Africa. Not all found the life of their dreams. Some were forced back into slavery or into poverty. But many did well, starting free communities in the Bahamas, for instance, and in Sierra Leone on the West Coast of Africa.

It is estimated that between eighty and one hundred thousand slaves left their owners during the war. (Thomas Jefferson believed Virginia alone lost thirty thousand slaves in 1781.) Many died of smallpox or fever in British military camps. Some were taken as slaves to Canada with their Loyalist owners. Some escaped to freedom in the cities. Others settled in the swamplands of Virginia, North Carolina, Georgia, and South Carolina, where they built cabins and farmed.

Those promised freedom for fighting on the American side did, in most cases, receive it. Those whose owners did not keep their word were able to appeal to the authorities. Ned Griffin was freed by the North Carolina legislature after his owner re-enslaved him, and Jack Arabas brought successful court action against his master in Connecticut for the same reason.

The American Revolution taught Blacks that they could make demands on white society. Even before war's end, they began to speak for their rights. In 1780, seven free people of color petitioned the Massachusetts legislature for the right to vote, pointing out that they were subject to taxation without representation by the new American government. In Boston, a group of Blacks asked for school funding, something whites already had. In Norfolk, Virginia, they asked for the right to testify in court.

Black Clergy Speak Out. Many African-American clergy were outspoken, despite threats to their lives. David George, George Liele, and Andrew Bryan pioneered the African Baptist Church while still slaves. George and Liele left America with the British. Liele later established the Baptist Church in Jamaica, and George continued his work in Nova Scotia, Canada, then Sierra Leone. Bryan bought his freedom when his master died, and with help from white Baptists, raised money to build the First African Baptist Church of Savannah.

Lemuel Haynes was a Minuteman at Lexington and Concord and became the first African-American minister of the Congregational Church in America. Absalom Jones, an early leader of the African Methodist Church in Philadelphia, helped organize a school for African-American children, created and directed an insurance company, and organized protests against Black civil rights violations.

**Raising White Consciousness**

The revolutionary fight for equality reached white people who had never before questioned slavery. Many owners, especially in the North, freed their slaves or made arrangements for freedom when they died. Large abolitionist societies formed in northern states and in Maryland. Members worked to protect free African-Americans from being sold back into slavery and provided them with education and job training. One by one, northern states followed the example of Pennsylvania and Massachusetts, passing laws that provided for the gradual emancipation of all slaves.

Slavery existed in the North until well into the 1800s, but by 1804, all northern states had laws abolishing it. Southern leaders also spoke out against slavery, but there was not enough support to pass antislavery laws. Virginia, however, made it easier for owners to free their slaves, doing away with a law that required them to first obtain consent from the legislature. Virginia also decreed the death penalty to anyone who knowingly sold a free person as a slave.

The number of free African-Americans increased after the war in Virginia, Maryland, and North Carolina, and these states gradually limited or banned the slave trade. Nevertheless, the slave population grew in the South as African­ Americans continued to be born into slavery. South Carolina and Georgia were more tied to slavery than ever with the advent of cotton as an important crop. These states stepped up the slave trade after the war.

**White Prejudice Grows**

Many owners enforced even stricter slave codes after the war to prevent revolts. Southern states passed laws that reflected the growing racial prejudices of white slave owners. These prejudices arose from feelings of white superiority. But they also arose from the fear of violence at the hands of slaves who suffered from miserable treatment and resented a system that excluded them from the calls for freedom that were rising up around them. So in many ways, white prejudice fed on itself, resulting in a legal system that looked the other way, for instance, when an owner killed a slave. Yet the same system demanded death for a slave who killed a cruel overseer.

Eventually, in response to continued unrest, some southern states, such as Virginia and North Carolina, passed laws giving African-Americans some legal protection, such as the right to trial by jury and the right to be represented by a lawyer. However, when cases came to court in the South, most judges and juries automatically ruled in favor of owners. The double legal standard against African-Americans would continue well into the twentieth century.

**Rights for Slaves**

During the war, some owners realized that they could no longer control their slaves' lives; these slaves enjoyed some independence. After the war, some owners allowed slaves to sell produce grown in their own small gardens. Slaves also could sell baskets, chairs, wooden bowls, and other items made on their own time. They could hire themselves out to other plantations for field work on Sundays. Others worked freely as butchers, tailors, carpenters, masons, and cobblers. They were required to give a percentage of their earnings to their owners, but they saved the rest for their freedom.

**Big Losses for American Indians**

The British did make provisions for their Native allies in the peace treaty they signed with the colonists. According to the 1783 treaty, England recognized the former colonies as the United States, an independent nation, granting the former colonists all land from the Atlantic Ocean to the Mississippi River and from Canada to Florida. England gave Florida to Spain. The treaty ignored the fact that the territory handed to the United States was Indian land.

Indians were forced to negotiate separate treaties with the Americans, most of whom regarded them as defeated enemies. U.S. officials held meetings with Indian representatives, informing them that their lands had been surrendered by the British and that they must now recognize U.S. control. Indians were shocked and angered. They had lost people, crops, even entire villages in the war. And they had been good allies to the British.

Creek and Choctaw in the South had succeeded until the war's end in keeping Savannah in British hands. The Iroquois continued their raids on Americans long after the British surrendered at Yorktown. They had not admitted defeat and could not understand how the British could leave them to deal with land-hungry settlers. Because white settlement of Indian lands had ceased during the war, Native people had good reason to prolong the fight. When the conflict ended, settlers and land speculators once again moved west.

**Creating Reservations**

After the war, the U.S. government set aside land for Indians within portions of their former territories. Shawnee, Delaware, Wyandot, some Ottawa, and Ojibwa were given reservations in Ohio. The Iroquois League, including the Tuscarora and Oneida, who had supported the Americans in the war, received small reservations in New York. Many Mohawk and other Iroquois followers of Joseph Brant went to Canada, where the British honored the Indians' loyalty with land along the Grand River in what is now Ontario. Their town became known as Brantford, and Joseph Brant remained an important leader.

**Taking Indian Land**

Indians in the Great Lakes region soon found their new treaties violated by white settlers. Individual states had more power than the federal government, so agreements between Congress and Native people often were under­ mined by the states, whose citizens had no sympathy for Indians. Their prejudices had been fueled by the war's fierce fighting. Also, many of these people could not afford land in parts of the United States already settled. They did not know Indian culture and did not understand the spiritual connection between Indians and the land. They wanted to fulfill their own dreams. .

The prevailing mood of white Americans was reflected in these words by an army officer: "The people of Kentucky will carry on private expeditions against the Indians and kill them whenever they meet them, and I do not believe that there is a jury in all Kentucky who would punish a man for it."

The U.S. Congress attempted to protect what rights the Indians still retained. Congress warned settlers in 1783 not to purchase or settle Indian lands. In 1785, Congress told settlers to stay south of the Ohio River. The federal government sent troops to evict squatters who ignored these orders, but their efforts failed. White settlers kept coming, and Congress did not send enough troops to enforce the law.

There was much fighting between Indians and white settlers in the Great Lakes region. In 1787, the Northwest Ordinance, enacted by the U.S. Congress, encouraged European-Americans to settle the present states of Ohio, Indiana, Illinois, and Wisconsin. Battles grew more heated and involved many tribes, including the Miami, Potawatomi, Menominee, Illinois, Sauk, Fox, Winnebago, and Shawnee. Fighting continued into the nineteenth century, with Indian lands whittled into ever-smaller pieces.

**Troubled Times in the Southeast**

The situation was difficult and confusing for southeastern tribes after the war. Their lands lay in areas claimed by several governments, so they could not be sure whom they could trust in negotiating treaties. The Cherokee, for instance, occupied land claimed by North Carolina, South Carolina, and Georgia, and in the far South by France and Spain. The new central government of the United States also claimed much of this land. Some claims overlapped areas belonging to the Creek and the Chickasaw. Worse, government agents who negotiated treaties often acted for land speculators. They went after the most land for the lowest possible price.

The Cherokee, Creek, Choctaw, and Chickasaw reluctantly made separate treaties with the U.S. government. Each tribe gave up much land in return for promises that new land would be protected. As in the North, white settlers moved onto Indian lands any way, with bloodshed for years to come.

**Adopting European Ways**

In the troubled years following the American Revolution, southeastern Indians abandoned ancient traditions. Some of these changes came through intermarriage with the whites. Colonial men who had fought for the British married Native women. They often moved their families from tribal towns to farms where they lived independently. They had many children but did not teach them their Native language and religion and did not allow the wife's brother to teach them, as was the custom in matrilineal tribes.

Other southeastern Indians began adopting more and more white customs in the hopes that this would make them acceptable to their European-American neighbors. Their farms resembled white farms, with livestock, cotton, and wheat. They learned European techniques for such trades as spinning, weaving, and blacksmithing and started their own businesses. They purchased slaves, wore European clothing, and sent their sons to missionary schools.

Adopting white ways helped southeastern tribes become less dependent on trade with the European-Americans, but it turned them away from their own chiefs and religious leaders. European-Americans failed to accept the Natives as equals, even though they were granted many of the liberties and rights under the law that the colonists had sought in the Declaration of Independence.

**American Women Speak Out for their Rights**

As we have learned, colonial women played an important role in the Revolution. They performed jobs that kept the new nation alive while its men were at war. They farmed and worked in many trades and professions. They followed their men to the battlefields and tended to their needs, sometimes even taking up arms. They also participated in public affairs, boycotting British goods, campaigning against the British tea tax, and confronting merchants who gouged them with high prices.

This was considerable progress for European-American women, who had previously lived in the shadows of their husbands, brothers, and fathers. They had no voting rights, and if they were married, could not own property; many had no formal education and could not read or write.

As a result of their enlarged role, women began to speak up for greater rights under the law even before the war ended. In 1776, Abigail Adams urged her husband, John Adams, to "remember the ladies" in the new code of laws that he and other members of the Continental Congress would devise. She asked him not to give men- as much power over women as they had held in the past. "Remember all men would be tyrants if they could," she said in a letter written while he was meeting with the Continental Congress. If men did not give women their due rights, she warned, women would rebel.

Others spoke out for women's rights after the war. Mary Wollstonecraft of England wrote a book about women's rights that was read widely in the United States. In it, she urged women to be more assertive. She warned that men often confused soft-spokenness with weakness.

Women did not get the vote after the Revolutionary War except in New Jersey, and that right was revoked in 1807. After the war, there was a tendency by men to push women back into dependent roles at home as wives and mothers. Nonetheless, American society was changing, and women were making strides. The daughters and granddaughters of revolutionary-era women would in greater and greater numbers go to school, hold jobs, campaign against slavery, work to improve conditions in prisons and poorhouses, and consistently speak out for more rights for themselves. The roles of women in the Revolution were omitted from many history books written by European-American men.

**Poverty Remains, but Doors Open**

Poverty did not go away after the American Revolution but in some important ways, the war improved the lot of people in the lower economic classes. Many poor, for instance, received land in exchange for fighting for the revolutionary cause. (Unfortunately, this land was often on the frontier and conflicted with the rights of American Indians to retain their homelands.) Indentured servants also received freedom as a result of enlisting in the army. In New York, people spoke out against the indentured servant system because it robbed people of their liberties. The system remained in existence, however, for many years.

The colonial tradespeople and laborers who had supported the revolutionary cause in the northern cities did not receive much power in the new American government. However, like many African-Americans, they learned that they could speak out against injustices and that their words and actions could make a difference. These feelings carried over into the workplace.

Where once they had regarded their employer as a benefactor or guardian whose deeds they could not question, they now knew employers sometimes took advantage of them, demanding long hours in unsafe surroundings for low pay. They learned to band together with workers in their city and in other cities to demand better conditions. The revolutionary fight for "life, liberty, and the pursuit of happiness" thus planted the seeds for what became known as the American labor movement.

**The Changing Map**

There was a great shifting of populations in North America as a result of the Revolutionary War. As many as eighty thousand people in all departed. Some returned to England or settled in Louisiana. Most made their way to Canada, still English territory but only sparsely populated by European settlers. They settled in what are now Ontario, Quebec, New Brunswick, and Nova Scotia. Loyalists included American Indians, African­ Americans, and colonists of English, Scottish, Irish, French, and German ancestry. They helped make Canada the multicultural society it is today.

Many people moved onto unsettled frontier, and others flocked to new cities, abandoning coastal cities that had been badly damaged by war. State government moved with them. Richmond became the capital of Virginia instead of Williamsburg. Albany replaced New York City as the capital of New York. Columbia became the capital of South Carolina instead of Charleston, and Augusta became the capital of Georgia instead of Savannah. The new state capitals were more convenient to the frontiers and were accessible to trade of tobacco, cotton, and other crops.

Some people also felt safer in the new, less crowded cities. During the Revolution, rural people had come to distrust the larger cities, with their many problems and ties to British wealth. A general suspicion of large cities exists today among people in less populated regions of the country.

Other patterns emerged after the Revolutionary War. The northeastern seaboard cities, which had been centers of political activity against the king, have remained, to a great extent, politically liberal, whereas southern regions have remained politically conservative. In the 1800s, leaders who stood for the rights of the oppressed continued to arise in Boston, Philadelphia, and New York. In 1835, workers in Philadelphia successfully struck for a ten-hour workday. Dorothea Dix helped improve terrible conditions in Boston prisons and poor­ houses in the 1840s.

Zell, Fran. *A Multi-Cultural Portrait of the American Revolution*. New York: Benchmark Books, 1996. pp. 63-73

**Lesson 3 - Heroes of the Revolution React to Shays’ Rebellion**

The American Revolution, it seemed, had almost gone too far. **General George Washington** wrote:

"I am mortified beyond expression when I view the clouds that have spread over the brightest morn that ever dawned in any country... What a triumph for the advocates of despotism, to find that we are incapable of governing ourselves and that systems founded on the basis of equal liberty are merely ideal and fallacious."

Others in the political elite held the same opinion -- even Massachusetts' onetime Revolutionary agitator, **Samuel Adams**:

"Rebellion against a king may be pardoned, or lightly punished, but the man who dares to rebel against the laws of a republic ought to suffer death."

Only the young **Thomas Jefferson** -- reflecting more philosophically and from a safe distance in Europe -- disagreed:

"A little rebellion now and then is a good thing. It is a medicine necessary for the sound health of government. God forbid that we should ever be twenty years without such a rebellion."

**Appendix B: Handouts and Recording Forms**

**Lesson 1 - Vocabulary Terms Organizer**

Name:

Date:

|  |  |  |
| --- | --- | --- |
| **Term** | **Definition** | **Examples/Memory Cues** |
| alliance (ally, allies), |  |  |
| anarchy |  |  |
| anarchy |  |  |
| appropriate (v), |  |  |
| arsenal |  |  |
| colonialism |  |  |
| confederation |  |  |
| covenant |  |  |
| debtor |  |  |
| disenfranchise (-ment) |  |  |
| Emissary |  |  |
| escalate |  |  |
| habeus corpus |  |  |
| indemnify |  |  |
| insurgent |  |  |
| jurisdiction |  |  |
| militia |  |  |
| perspective |  |  |
| privateer |  |  |
| radicalism |  |  |
| ratify (ratification) |  |  |
| regressive |  |  |
| regulate (regulator, regulation) |  |  |
| republic |  |  |
| sovereignty |  |  |
| treason |  |  |
|  |  |  |
|  |  |  |

**Lesson 1 - Stakeholders Recording Form**

Name:

Date:

|  |  |  |  |
| --- | --- | --- | --- |
| **Name & Role** | **Social Factors**  (family, education, …) | **Economic Factors**  (occupation, wealth, …) | **Political Factors**  (role in gov’t, …) |
|  |  |  |  |

**Lesson 2 - The Articles of Confederation Simulation (for teacher reference)**

Hand each pair of students an index card with information on their state and how their state would respond to different acts in Congress.  (Each of these index cards has information that explains how the state would vote concerning several issues: asking the states to raise taxes to pay for our war debt, creating a national currency, expanding west and creating 3-5 new states in the northwest territory, amending the A.O.C. so a law can pass with a simple majority, and amending the A.O.C. so a 3/4 vote allows amendment of the AOC.)

Tell students there will be several rounds to this simulation of the Articles of Confederation.  The teacher plays the role of the president of the Articles of Confederation.  Each issue that is brought up, students are encouraged to speak for their state.

After a brief conversation/debate, students are asked to vote.  This happens round after round and students quickly figure out that none of the laws are passed because 9 our of the 13 states never agree (except on Westward Expansion).

The index cards need to "create" this scenario - so on the index cards the teacher needs to identify multiple states who disagree with a law so those states know to speak against it and to vote against it.   Again, the point is not strict historical fidelity but to support the concept that the AOC doesn't work.  When students realize that the AOC isn't working because of the 9/13 rule, the president moves to amend the AOC so a simple majority can pass a law.  This doesn't pass because you need a unanimous vote to amend.  Then the president calls for a vote to amend the amendment process so a 3/4 vote can amend the AOC.  This of couse doesn't pass either.  Students walk away understanding the issue of the 9/13 vote to create laws as well as the issue of the unanimous vote to amend.

**Lesson 2 - Video Recording Form**

Name:

Date:

Text/Resource Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
|  | Initial Impression |
| 1st READ |  |

|  |  |  |
| --- | --- | --- |
|  | **Details** | **Central Ideas/Gist** |
| **2nd READ** |  |  |

|  |
| --- |
| **Key Vocabulary** |
|  |

**Lesson 3 - Charts with Trend Data for The Critical Period[[1]](#footnote-1)**

Name:

Date:

**Changes in Voter Qualifications**

Note: To convert pounds to dollars (in today’s terms), add two zeroes after the number of pounds (40 pounds = $4000).

|  |  |  |
| --- | --- | --- |
| **Colony/State** | **Before Revolution** | **After Revolution** |
| Connecticut | Land worth 40 pounds or rentable for 2 pounds yearly | Same |
| Delaware | 50 acres or any property worth 40 pounds | All taxpayers |
| Georgia | 50 acres | Any property worth 10 pounds |
| Kentucky | Statehood established in 1792 | All adult males |
| Maryland | 50 acres or any property worth 40 pounds | 50 acres or any property worth 30 pounds |
| Massachusetts | Property worth 40 pounds or land rentable for 2 pounds yearly | Property worth 60 pounds or land rentable for 3 pounds yearly |
| New Hampshire | Landed estate worth 50 pounds | All taxpayers |
| New Jersey | Landed estate worth 50 pounds | Any property worth 50 pounds |
| New York | Landed estate worth 50 pounds | Landed estate worth 20 pounds or rentable for 2 pounds yearly |
| North Carolina | 50 acres | All taxpayers |
| Pennsylvania | 50 acres or any property worth 40 pounds | All taxpayers |
| Rhode Island | Property worth 40 pounds or land rentable for 2 pounds yearly | Same |
| South Carolina | 50 acres or land rentable for 2 pounds yearly | Same |
| Tennessee | Statehood established in 1796 | All adult males |
| Vermont | Statehood established in 1791 | All adult males |
| Virginia | 25 acres and a house | Same |

**Patterns of Slave Ownership**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **STATE** | **1790** | **1800** | **1820** | **1830** |
| Massachusetts | 0 | 0 | 0 | 1 |
| New Hampshire | 157 | 8 | 0 | 3 |
| Rhode Island | 958 | 380 | 48 | 17 |
| Connecticut | 2,648 | 951 | 97 | 25 |
| Pennsylvania | 3,707 | 1,706 | 211 | 403 |
| New Jersey | 11,423 | 12,422 | 7,557 | 2,254 |
| New York | 21,193 | 20,903 | 10,088 | 75 |
| Delaware | 887 | 6,153 | 4,509 | 32,292 |
| Maryland | 103,036 | 107,707 | 111.917 | 107,499 |
| North Carolina | 100,783 | 133,296 | 204,917 | 245,.601 |
| South Carolina | 107,094 | 146,151 | 258,475 | 315,401 |
| Georgia | 29,264 | 59,232 | 110,055 | 124,345 |
| Virginia | 292,627 | 346,968 | 411,886 | 453,698 |

**State-Chartered Banks**

|  |  |
| --- | --- |
| **YEAR**  Before states sponsored and set up banks, people who needed to borrow money had to ask a wealthy merchant or landowner, who could – and did – charge heavy fees and/or penalties. Property could be seized from those owing money. | **Number of STATE-CHARTERED BANKS** |
| 1782 | 1 |
| 1786 | 2 |
| 1790 | 4 |
| 1792 | 12 |
| 1793 | 15 |
| 1795 | 20 |
| 1797 | 22 |
| 1799 | 25 |
| 1800 | 28 |
| 1816 | 246 |

**Lesson 3 - Primary Source Close Reading Guide**

The Common Core meets Reading Like a Historian[[2]](#footnote-2)

Note: This can be used to plan a close read of a primary source. It provides questions to think about and options for how to structure the lesson.

|  |  |
| --- | --- |
| **Questions/Student prompts** | **Teaching notes** |
| **FIRST READ: Determining source and context for the text**  **Sourcing:**   * Who wrote or created this document? * When? * Why might this person have written or created this document? * Is this document likely to have a particular point of view? If so, what?   **Contextualization**:   * Where was this document created? * Given the time and place, to which historical events might it relate? * How might this affect the content of the document? | Distribute the document to students and allow them to initially engage with the text without too much mediation.  If the text is short, they should read the whole text. If it is longer, it may make more sense for them to read the sourcing information and the first few paragraphs.  Depending on the complexity of the text, you may wish to support students by reading all of part of the text aloud as they read silently. You may also wish to provide definitions, either orally or by writing them on the text, of words that meet ALL criteria below:   * are central to the meaning of the text * are likely to be unfamiliar to students * cannot be determined from context   After students have read the text, engage them in questions of sourcing and contextualizing the document, using the questions at left. In order to contextualize a document, students will need to have and draw on some background knowledge. Consider referring them to a specific text or lesson.  Depending on student independence with these skills, you might choose to:   * model, either by thinking aloud or by having the class help you * use think/pair/share * have students work with partners and then call on several groups to share out * have students work individually and then lead a class debrief   Until all students are proficient with this, all options need to include a class check-in, so that students who are not on the right track recognize this and correct themselves.  This type of questioning is closely related to CCSS RHSS standard 6, as considering author and context is an important step in determining an author’s purpose and noticing how that purpose shapes a document. |
| **SECOND READ: Getting the big picture**  Read the whole text, one chunk at a time.  As you read, mark parts of the text that:   * help you understand more about the source and context of this piece * help you answer the focusing question   For each chunk of the text, circle words you don’t know. Use context clues and word parts to try to figure out what those words means, and write your ideas in the margin next to the word.  For each chunk, try to figure out what the gist of this chunk is: What is the text about? What is it saying? Write your ideas in the margins next to each chunk. | For a longer or difficult text, chunk the text for students. The more complex the text, the shorter the chunks should be.  Set a purpose for students’ reading: what historical question(s) might this document help them answer? In addition to marking vocabulary and thinking about gist, encourage them to underline phrases that relate to their focusing question.  They may also want to mark parts of the text that help them add to their thinking about source and context.  Students can do this work alone or with a partner; they can read silently or partner read. If the text is long and very complex, consider reading each chunk aloud as students follow along and then releasing them to discuss vocabulary and gist. You may also consider having most students work with partners or alone on this step while you work with a smaller group of struggling readers and support them with read-aloud and more frequent guidance about the meaning they are constructing.  Consider making a list of words whose meanings you’d like students to generate from context as they read and posting that list. List words that are central to the meaning of the text and whose meaning can be determined from context or word parts.  As students work, circulate and listen in, noticing any common misunderstandings. Ask students, “What in the text makes you say that?”  Debrief this work. Depending on the text and your students, you may wish to do this one chunk at a time (in the case of a very complex text, where a misunderstanding early on will make it difficult for students to make meaning of the subsequent text independently), or you may wish to do it after students have grappled with the whole text. A significant portion of this conversation should be about vocabulary and how students determined the meanings of words from context.  Complete this step by asking students to explain what the text as a whole is mostly about. Questions about author purpose and structure, even those related to only one excerpt, often require a clear understanding of the overall meaning of the text.  Note: This step relates closely to CCSS RHSS 2 and RHSS 4. |
| **THIRD READ: Text-dependent questions** | Ask students to complete a task that requires them to go back to the text and look closely at specific sections or at the text as a whole.  Options:   * Text-dependent questions, especially those focusing on claims an author is making, how an author uses details/evidence, or how point of view is apparent * Specific note-taking task (gathering evidence for a particular question) * Annotating the text with what they notice and wonder in regard to a particular question   Note: This step relates closely to CCSS RHSS 1, 2, 4, and 6. It could relate to other standards, also, depending on the text dependent questions you ask. |
| **LAST: Evaluate the source**  Look again at your ideas about source and context. Now that you have read the text carefully, how might you revise your original ideas? How does the author and purpose of the document affect its content?   * What have you learned about the point of view of the author and his/her purpose for writing? * What information or opinions does this document include about the historical event to which it is related? How does this connect to what you know about the author and his/her purpose? * How did reading the document closely help you refine your original ideas about sourcing and context?   How does this source compare to other sources that are related to this event or time period?   * What information or ideas have you also found in other sources? What information or ideas are only in this source? Why might that be? * What evidence in this document is most believable? Why?   What did this source add to your understanding of the historical question you are investigating? | Now that students have read the document closely, they should revisit their original ideas about source and context, and they should also be able to evaluate the source more holistically. In this step, they should consider how the author and purpose of the document affects its content.  First, direct students to revisit and revise their sourcing and context notes. Consider doing this alone, in partners, or as a class, depending on student independence with this skill. Students should revise their original notes to reflect their new thinking. Support them in noticing how the author and his/her purpose affected the content of the document.  Next, help students evaluate the source by corroborating it with other sources. Consider doing this alone, in partners, or as a class, depending on student independence with this skill. It may be useful to return to the question of corroboration several days later, after students have read more documents.  Finally, make sure students reflect on how this source helped them address their focusing question or topic of historical inquiry  This step relates especially to CCSS RHSS 9. |

**Lesson 3 – Shays’ Rebellion lecture burst: *See separate Resources link***

**Lesson 3 - Capturing the Gist Recording Form**

Name:

Date:

Text/Resource Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| **Details** |  |  |  |
| **Gist Statement** |  | | |

Lesson 4 - Shays’ Rebellion Close Reading Recording Form

Name:

Date:

Text/Resource Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
|  | Initial Impression |
| 1st READ |  |

|  |  |  |
| --- | --- | --- |
|  | **Details** | **Central Ideas/Gist** |
| **2nd READ** |  |  |

|  |
| --- |
| **Key Vocabulary** |
|  |

**Text-Dependent Questions**

1. Summarize the events described in what you read.
2. Who was the narrator/writer? What was the narrator’s perspective on the events?
3. In what ways is this person or event historically significant?
4. What individuals, groups, or social forces involved? To what extent did they influence the event?

1. What evidence does this primary source contribute to the argument you are making?

Lesson 4 - Shays’ Rebellion Close Reading Recording Form Annotated (*for teacher reference)*

Name:

Date:

Text/Resource Title: *An Address to the People* by Daniel Gray of Pelham

|  |  |
| --- | --- |
|  | Initial Impression |
| 1st READ | Daniel Gray is a Regulator who wants to explain their cause to other townspeople. This looks a list of reasons he might have published in the Gazette to explain their reasons. |

|  |  |  |
| --- | --- | --- |
|  | **Details** | **Central Ideas/Gist** |
| **2nd READ** | 1. The money collected for taxes will result in jails filled with people who could otherwise benefit their communities 2. The tax money collected to pay war debt. 3. Debtors - sent to jails anywhere without due process 4. Riot Act granted power to sheriffs and judges who might be unfriendly to the Regs’ cause  * ‘  1. Not true that Regulators rebellion caused by British; they only want fair measures to pay for state’s debts | **Economic factors** – the farmers could not afford the taxes of the state and were often thrown in jail without due process.  **Political factors** – The Riot Act allowed sheriffs to put debtors into prison anywhere in the state  **Social factors** – the taxes were a heavy burden on those who could least afford them. |

|  |
| --- |
| **Key Vocabulary** |
| Writ of Habeus Corpus - law that specifies the rights of the accused  viz – namely  gaol - jail  indemnify – to protect someone from responsibility for their action(s) |

**Text-Dependent Questions Annotated *(for teacher reference)***

1. Summarize the events described in what you read.

This is a letter or speech published in the weekly Hampshire Gazette by a Regulator who lived in Pelham. He felt the need to go public with their grievances so that the Regulators would not be misunderstood. The grievances included being jailed for debts because of unpaid taxes, legal authorities given unlimited power to arrest people and send them to prison. He ended by saying that the Regulators just wanted a fair system of taxation.

1. Who was the narrator/writer? What was the narrator’s perspective on the events?

Daniel Gray was wealthy but sympathetic to the Regulators. He supported the Regulators and was willing to publically state their case and put his name to it.

1. In what ways is this person or event historically significant?

Daniel Gray himself is less important than Shays’ Rebellion which was to follow in the next several weeks. Shays and over a thousand men stormed the Springfield armory in search of weapons they could use to attack Boston and overthrow the government. It was a flash point that brought the Founding Fathers, especially Washington, to write the United States Constitution.

1. What individuals, groups, or social forces were involved? To what extent did they influence the event?

The Regulators’ original cause was economic (being imprisoned for not paying taxes) but it also became political because they knew they had to have the power to change the law; if not the law, then the government.

1. What evidence does this primary source contribute to the argument you are making?

It is a well-written documentation of why the Regulators took up arms.

**Lesson 6 - Socratic Seminar Participant Responsibilities**

|  |  |
| --- | --- |
| Responsibility | What it looks like/sounds like… |
| Refer to the text when needed during the discussion. A seminar is not a test of memory. You are not “learning a subject;” your goal is to understand the ideas, issues and values reflected in the text. |  |
| It’s okay to “pass” when asked to contribute. |  |
| Do not participate if you are not prepared. A seminar should not be a bull session. |  |
| Do not stay confused; ask for clarification. |  |
| Talk to the participants, not just the leader. |  |
| Stick to the point currently under discussion; make notes about ideas you want to come back to. |  |
| Don’t raise hands; take turns speaking. No side conversations. |  |
| Listen carefully and respectfully. |  |
| Discuss the ideas rather than each other’s opinions. |  |

**Lesson 6 - Socratic Seminar Tracking Sheet (for teacher reference)**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name | Takes a position | Relevant  Comment | Refers to text | Brings others in | Thoughtful questions | Makes analogies | Recognizes  Contradictions | Interrupts | Monopolizes | Comments |
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Lesson 7 - Model Argumentative Essay

Name:

Date:

After researching primary and secondary sources on the post-Revolutionary Period, write an opinion editorial that argues how well the promises expressed in the Speech to Six Nations of 1776 were upheld during the years following the American Revolution. Support your position with evidence from your research.

**L2** Be sure to acknowledge competing views.

**L3** Give examples from political, economic, and social factors to illustrate and clarify your position.

A BETRAYAL OF LIBERTY

*“We think that you must be fully convinced that your safety, as nations, depends on preserving peace and friendship with the white people of this island.”*

* Address to the Six Nations, December 7, 1776

The Speech to Six Nations, written by the Continental Congress, was a series of appeals to the various tribes of Natives to remain neutral in the Americans’ fight for independence. The Continental Congress strongly urged neutrality, or better yet, an alliance with the emerging country. An alliance with the Americans would ensure protection and prosperity for the Indians. However, the promises made to the Six Nations and other Natives were false promises which resulted in the total destruction of the Indian way of life.

The Six Nations was a confederation of six tribes inhabiting an area that extended from New York through the Ohio lands. The long-standing, politically stable alliance had begun to form even before the first settlers began to colonize the continent. The American Revolution created a split in the alliance as some of the tribes sided with the British who had promised in 1763 to protect Indian lands beyond the Appalachian Mountains. These tribes fought to keep their land safe from colonial expansion. When the British lost the war, under the terms of the Peace of Paris in 1783, they handed over all its territory east of the Mississippi, south of the Great Lakes, and north of Florida. Native Americans were not included in these negotiations; their already minimal political power had disappeared altogether.

In the Address to Six Nations in December 1777, tribes who had supported the Patriot cause were promised security: “While the sun and moon continue to give light to the world, we shall love and respect you. As our trusty friends, we shall protect you; and shall at all times consider your welfare as our own.” The Natives’ welfare was based on hunting, gathering, and farming according to traditional methods. Beyond these, they traded for their needs. The Indians resisted European-style farming and sale of their lands; therefore, their lands in the East became an obstacle to the vision of liberty held by the leaders of the new country, but only for themselves.

It is indeed ironic that Thomas Jefferson, author of the Declaration of Independence, believed that the Natives needed the civilizing influence of agriculture. He felt that democracy depended on an agrarian class “and this will be as long as there shall be vacant lands in any part of America.” But who inhabited these so-called “vacant lands”? These lands were the only economic advantage the Indians possessed. Jefferson himself laid the groundwork for forced Indian removal from their lands east of the Mississippi. His emissaries eventually were instructed to force the Indians into signing treaties that sold land to the United States for 25 cents an acre. With the new money, Indians were encouraged to buy agricultural tools and manufactured products. According to historian Colin Galloway, approximately 30 treaties with a dozen tribes resulted in the loss of 200,000 square miles in nine states. The Indian way of life was rapidly vanishing.

The promises pledged so fervently in the Appeals to Six Nations ultimately turned out to be a betrayal of the ideals the new Americans had fought and died for. One might argue that at the time these promises were made sincerely and with the best interests of the Indians in mind, but the reality of the next decades of actions by the government of the “land of the free” showed them to be completely destructive of the American Indian way of life.

Works Consulted

Calloway, Colin O. “American Indians and the American Revolution.” *The American Revolution in Indian Country: Crisis and Diversity in Native American Communities.”* Cambridge: Cambridge University Press, 1995.

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Zinn, Howard. “Untold Truths about the American Revolution,” *The Progressive,* July 2009.

[www.progressive.org/zinn070309.html](http://www.progressive.org/zinn070309.html)

Lesson 7 - Model Argumentative Essay Annotated (for teacher reference)

Name:

Date:

After researching primary and secondary sources on the post-Revolutionary Period, write an opinion editorial that argues how well the promises expressed in the Speech to Six Nations of 1776 were upheld during the years following the American Revolution. Support your position with evidence from your research.

**L2** Be sure to acknowledge competing views.

**L3** Give examples from political, economic, and social factors to illustrate and clarify your position.

**Key to annotations**:

Transition Unit 2 vocabulary term **Claim/reference to claim** Quote

A BETRAYAL OF LIBERTY

*“We think that you must be fully convinced that your safety, as nations, depends on preserving peace and friendship with the white people of this island.”*

Address to the Six Nations, December 7, 1776

The Speech to Six Nations, written by the Continental Congress, was a series of appeals to the various tribes of Natives to remain neutral in the Americans’ fight for independence. The Continental Congress strongly urged neutrality, or better yet, an alliance with the emerging country. An alliance with the Americans would ensure protection and prosperity for the Indians. **However, the promises made to the Six Nations and other Natives were false promises which resulted in the total destruction of the Indian way of life.**

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The promises pledged so fervently in the Appeals to Six Nations ultimately turned out to be a betrayal of the ideals the new Americans had fought and died for. **One might argue that at the time these promises were made sincerely and with the best interests of the Indians in mind**,// **but the reality of the next decades of actions by the government of the “land of the free” showed them to be completely destructive of the American Indian way of life.**

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Zinn, Howard. “Untold Truths About the American Revolution,” *The Progressive,* July 2009. [www.progressive.org/zinn070309.html](http://www.progressive.org/zinn070309.html)

**Appendix C: Protocols[[3]](#footnote-3)**

* Admit and Exit Tickets
* Anchor Charts
* Checking for Understanding
* Fishbowl
* Primary Source Close Reading
* Socratic Seminar
* Strategies for Tackling Complex Text

 Admit and Exit Tickets Protocol

Purpose: At the end of class, students write on note cards or slips of paper an important idea they learned, a question they have, a prediction about what will come next, or a thought about the lesson for the day. Alternatively, have students turn-in such a response at the start of the next day–either based on the learning from the day before or the previous night’s homework. These quick writes can be used to assess students’ knowledge or to make decisions about next teaching steps or points that need clarifying. This reflection helps students to focus as they enter the classroom or solidifies learning before they leave.

**Procedure:**

* For 2–3 minutes at the end of class (or the start of the next one) have students jot responses to the reading or lesson on 3 x 5 note cards.
* Keep the response options simple–“One thing you learned and one question you have.” If you have taught particular thinking strategies–connecting, summarizing, inferring–ask students to use them.
* A variation is known as 3-2-1: Have students write three of something, two of something, then one of something. For example, students might explain three things they learned, two areas in which they are confused, and one thing about which they’d like to know more or one way the topic can be applied. The criteria for listing items are up to the needs of the teacher and the lesson, but it’s important to make the category for three items easier than the category for listing one item.
* Don’t let the cards become a grading burden. Glance over them for a quick assessment and to help you with planning for next learning needs. These are simply quick writes, not final drafts.
* After studying the “deck” you might pick-out a few typical/unique/thought-provoking cards to spark discussion.
* Cards could be typed up (maybe nameless) to share with the whole group to help with summarizing, synthesizing, or looking for important ideas. It is a good idea to let students know ahead of time as they may put more effort into the write-up. When typing, go ahead and edit for spelling and grammar.



**Anchor Charts Protocol: Making Thinking Visible**

**Purpose**

 Anchor charts build a culture of literacy in the classroom, as teachers and students make thinking visible by recording content, strategies, processes, cues and guidelines during the learning process. Posting anchor charts keeps relevant and current learning accessible to students to remind them of prior learning and to enable them to make connections as new learning happens. Students refer to the charts and use them as tools as they answer questions, expand ideas, or contribute to discussions and problem-solving in class.

**Building Anchor Charts**

 Teachers model building anchor charts as they work with students to debrief strategies modeled in a mini-lesson. Students add ideas to an anchor chart as they apply new learning, discover interesting ideas, or develop useful strategies for problem-solving or skill application. Teachers and students add to anchor charts as they debrief student work time, recording important facts, useful strategies, steps in a process or quality criteria. Students create anchor charts during small group and independent work to share with the rest of the class.

**A Note on Quality**

Anchor charts contain only the most relevant or important information so as not to confuse students. Post only those charts that reflect current learning and avoid distracting clutter—hang charts on clothes lines or set-up in distinct places of the room; rotate charts that are displayed to reflect most useful content. Charts should be neat and organized, with simple icons and graphics to enhance their usefulness (avoid distracting, irrelevant details and stray marks). Organization should support ease of understanding and be accordingly varied based on purpose. Charts are best in simple darker earth tones that are easily visible (dark blue, dark green, purple, black and brown). Use lighter colors for accents only.

For a wide variety of sample anchor charts, follow this URL: [*http://www.readinglady.com/mosaic/tools/AnchorChartPhotographsfromKellyandGinger/*](http://www.readinglady.com/mosaic/tools/AnchorChartPhotographsfromKellyandGinger/)



**C h e c k i n g   f o r   U n d e r s t a n d i n g :  K e y   A s s e s s m e n t   f o r   L e a r n i n g   T e c h n i q u e s**

When we check *all students'* levels of understanding throughout each lesson, it sets the tone that everyone's thinking is important and necessary, and we forward the learning and engagement of all. Some techniques are too time-consuming to use as quick pulse checks, but using these key techniques together *in all lessons* allows us to track learning and adapt instruction appropriately on the spot.

**In all lessons, teachers should:**

**Ground the lesson in the learning target.** This means they:

* Post the target in a visible, consistent location
* Discuss the target at the beginning of class with students, having students put the target into their own words, explain its meaning, and explain what meeting the target might look like
* Reference the target throughout the lesson
* Return explicitly to the target during the debrief, checking for student progress

**Use Cold Call.** This means they:

* Name the question before identifying students to answer it
* Call on students regardless of whether they have hands raised, using a variety of techniques such as random calls, tracking charts to ensure all students contribute, name sticks or name cards
* Scaffold the questions from simple to increasingly complex, probing for deeper explanations
* Connect thinking threads by returning to previous comments and connecting them to current ones. In this way, listening to peers is valued, and even after a student's been called on, s/he is part of the continued conversation and class thinking

**Use No Opt Out.** This means they:

* Require all students to correctly answer questions posed to them
* Always follow incorrect or partial answers from students by giving the correct answer themselves, cold calling other students, taking a correct answer from students with hands raised, cold calling other students until the right answer is given, and then returning to any student who gave an incorrect or partial answer for complete and correct responses

**Use guided practice** before releasing students to independent application. This means they:

* Ask students to quickly try the task at hand in pairs or in a low-stakes environment
* Strategically circulate, monitoring students' readiness for the task and noting students who may need re-teaching or would benefit from an extension or more challenging independent application
* Use an appropriate quick-check strategy (see below in Tools/Protocols section) to determine differentiation or effective support during independent application time

**End with an effective debrief.** This means they:

* Return explicitly to the learning targets (both academic and character/habits of work)
* Elicit student reflection towards the learning target(s), probing for students to provide evidence for their own and/or class progress
* Celebrate or have students celebrate individual, small group or whole class successes
* Identify or have students identify goals for improvement around the target(s)

**Quick-Check Tools and Protocols**

The following tools and protocols promote engagement by checking for all students' understanding and by reflecting on and emphasizing effective work habits.

**Whip-Around:** When a one- or two-word answer can show understanding, self- or group assessment, or readiness for a task, teachers ask students to respond to a standard prompt one at a time, in rapid succession around the room.

**Whiteboards:** Students have small white boards at their desks or tables and write their ideas/thinking/ answers down and hold up their boards for teacher and/or peer scanning.

**Hot Seat:** The teacher places key reflection or probing questions on random seats throughout the room. When prompted, students check their seats and answer the questions. Students who do not have a hot seat question are asked to agree or disagree with the response and explain their thinking.

**Fist-to-Five or Thumb-Ometer:** To show degree of agreement, readiness for tasks, or comfort with a learning target/concept, students can quickly show their thinking by putting their thumbs up, to the side or down; or by holding up (or placing a hand near the opposite shoulder) a fist for 0/Disagree or 1-5 fingers for higher levels of confidence or agreement.

**Glass, Bugs, Mud:** After students try a task or review a learning target or assignment, they identify their understanding or readiness for application using the windshield metaphor for clear vision. Glass: totally clear; bugs: a little fuzzy; mud: I can barely see.

**Red Light, Green Light**: Students have red, yellow and green objects accessible (e.g. popsicle sticks, poker chips, cards), and when prompted to reflect on a learning target or readiness for a task, they place the color on their desk that describes their comfort level or readiness (red: stuck or not ready; yellow: need support soon; green: ready to start). Teachers target their support for the reds first, then move to yellows and greens. Students change their colors as needed to describe their status.

**Table Tags:** Place paper signs/table tents in three areas with colors, symbols or descriptors that indicate possible student levels of understanding or readiness for a task or target. Students sit in the area that best describes them, moving to a new area when relevant.

**Sticky Bars:** Create a chart that describes levels of understanding, progress or mastery. Have students write their names or use an identifying symbol on a sticky note and place their notes on the appropriate place on the chart.

L**earning Line-ups:** Identify one end of the room with a descriptor such as "Novice" or "Beginning" and the other end as "Expert" or "Exemplary". Students place themselves on this continuum based on where they are with a task or learning target. Invite them to explain their thinking to the whole class or the people near them.

**Human Bar Graph:** Identify a range of levels of understanding or mastery (e.g. beginning/developing/ accomplished or Confused/I'm okay /I am rocking!) as labels for 3-4 adjacent lines. Students then form form a human bar graph by standing in the line that best represents their current level of understanding.

**Admit and Exit Slips:** Any relevant questions, prompts, or graphic displays of student thinking can be captured on a small sheet of paper and scanned by the teacher or other students to determine a student's readiness for the next step or assess learning from a lesson. Teachers may use admit slips as a "ticket to enter" a discussion, protocol or activity. These may also be used as "tickets to leave."

**Presentation Quizzes:** Whenever peers present, other students may think they are not responsible for the information. Pair student presentations and sharing with short quizzes at the end of class.

**Catch and Release/7:2**: When students are working on their own, they often need clarification or pointers so that they do not struggle for too long of a period or lose focus. A useful ratio of work time to checks for understanding or clarifying information is 7 minutes of work time (release), followed by 2 minutes of teacher-directed clarifications or use of one of the quick-check strategies (catch).

** Fishbowl Protocol**

Purpose: The fishbowl is a peer-learning strategy in which some participants are in an outer circle and one or more are in the center. In all fishbowl activities both those in the inner and those in the outer circles have roles to fulfill. Those in the center, model a particular practice or strategy. The outer circle acts as observers and may assess the interaction of the center group. Fishbowls can be used to assess comprehension, to assess group work, to encourage constructive peer assessment, to discuss issues in the classroom, or to model specific techniques such as literature circles or Socratic Seminars.

**Procedures:** Arrange chairs in the classroom in two concentric circles. The inner circle may be only a small group or even partners.

* Explain the activity to the students and ensure that they understand the roles they will play.
* You may either inform those that will be on the inside ahead of time, so they can be prepared or just tell them as the activity begins. This way everyone will come better prepared.
* The group in the inner circle interacts using a discussion protocol.
* Those in the outer circle are silent, but given a list of specific actions to observe and note.
* One idea is to have each student in the outer circle observing one student in the inner circle (you may have to double, triple, or quadruple up.) For example, tallying how many times the student participates or asks a question.
* Another way is to give each student in the outer circle a list of aspects of group interaction they should observe and comment on. For example, whether the group members use names to address each other, take turns, or let everyone’s voice be heard.
* Make sure all students have turns being in the inside and the outside circles at some point, though they don’t all have to be in both every time you do a fishbowl activity.

**Debrief:** Have inner circle members share how it felt to be inside. Outer circle members should respectfully share observations and insights. Discuss how the fishbowl could improve all group interactions and discussions.

**Variation:** Each person in the outside circle can have one opportunity during the fishbowl to freeze or stop the inside participants. This person can then ask a question or share an insight.

** Primary Source Close Reading Protocol**

The Common Core meets Reading Like a Historian

* First read
* Hand out text to students
* Define a few high leverage words that can’t be determined from context
* First read of text, either silently or out loud
* *Ask students to determine source (author, date, author purpose) and context (what historical events does this relate to? How might that shape the content?)* (RHST.6)
* Second read
* Chunk the text (or have students do the chunking)
* Reread each chunk and
* *gist* (RHST.2)
* *vocabulary in context* (RHST.4, L.4)
* Third read
* *Text dependent questions OR specific note-taking task (e.g., what reasons does the author give for opposing segregation – left column is reason, right column is textual evidence)* (RHST.1)
* Evaluate source
* *Revisit and add to sourcing and context; consider questions of corroboration (how does this source compare to others?)* (RHST.9)

*Note: everything in italics is a task that students grapple with independently, either alone or with a partner, and then is debriefed with the class*

References: <http://sheg.stanford.edu/> for more info about reading like a historian, including assessment options

 Socratic Seminar Protocol

Purpose

The Socratic Seminar is used in many Expeditionary Learning classrooms to promote student thinking and meaning making, and the ability to debate, use evidence, and build on one another’s thinking. When well designed and implemented, the seminar provides an active role for every student, engages students in complex thinking about rich content, and teaches students discussion skills. One format for the seminar is as follows:

**Procedures**

1. The teacher selects a significant piece of text or collection of short texts related to the current focus of study. This may be an excerpt from a book or an article from a magazine, journal, or newspaper. It might also be a poem, short story, or personal memoir. The text needs to be rich with possibilities for diverse points of view.
2. The teacher, or whoever is to facilitate the seminar, develops an open-ended, provocative question as the starting point for the seminar discussion. The question should be worded to elicit differing perspectives and complex thinking. Participants may also generate questions to discuss.
3. Participants prepare for the seminar by reading the chosen piece of text in an active manner that helps them build background knowledge for participation in the discussion. The completion of the pre-seminar task is the participant’s “ticket” to participate in the seminar. The pre-seminar assignment could easily incorporate work on reading strategies. For example, participants might be asked to read the article in advance and to “text code” by underlining important information, putting questions marks by segments they wonder about, and exclamation points next to parts that surprise them.
4. Once the seminar begins, all participants should be involved and should make sure others in the group are drawn into the discussion.
5. The seminar leader begins the discussion with the open-ended question designed to provoke inquiry and diverse perspectives. Inner circle participants may choose to move to a different question if the group agrees, or the facilitator may pose follow-up questions.
6. The discussion proceeds until the seminar leader calls time. At that time, the group debriefs their process; if using a fishbowl (see below), the outer circle members give their feedback sheets to the inner group participants.
7. If using a fishbowl, the seminar leader may allow participants in the outer circle to add comments or questions they thought of while the discussion was in progress.

Criteria

Participants…

* **Respect other participants.** Exhibit open-mindedness; value others’ contributions.
* **Are active listeners.** Build upon one another’s ideas by referring to them when it is your turn to talk.
* **Stay focused on the topic.**
* **Make specific references to the text.** Use examples from the text to explain your point.
* **Give their input.** Ensure that you participate.
* **Ask questions.** As needed, ask clarifying questions to ensure that you understand the points others are trying to make, and ask probing questions which push the conversation further and deeper when appropriate.

Sample Checklist of Specific Look-Fors

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Did the Participant…** | **Consistently** | **Occasionally** | **No** | **Notes/Comments** |
| Respond to other participants’ comments in a respectful way? |  |  |  |  |
| Listen attentively without interruption? |  |  |  |  |
| Use eye contact with peers? |  |  |  |  |
| Exhibit preparation for the seminar? |  |  |  |  |
| Reference the text to support response? |  |  |  |  |
| Participate in the discussion? |  |  |  |  |
| Ask clarifying and/or probing questions |  |  |  |  |

Option: Using a Fishbowl

When it is time for the seminar, participants are divided into two groups if there are enough people to warrant using a fishbowl approach. One group forms the inner circle (the “fish”) that will be discussing the text. The other group forms the outer circle that will give feedback on content, contributions, and/or group skills. (Note: “Fishbowls” may be used with other instructional practices such as peer critiques, literature circles, or group work. If the number of participants in the seminar is small, a fishbowl does not need to be used.)

Each person in the outer circle is asked to observe one of the participants in the inner circle. Criteria or a rubric for the observations should be developed by/shared with participants in advance.

**Strategies for Tackling Complex Text[[4]](#footnote-4)**

## Overview

Successful readers use a variety of techniques or strategies to help them scan text, sound out letters, analyze sentence structure, and “translate” the sentences into a meaningful message. These strategies can be grouped into three distinct categories or “cueing systems” – semantic, syntactic, and graphophonic.

Semantic Strategies: Read for meaning and identify unfamiliar words

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*Beginning readers must be able to use all three cueing systems in a coordinated way: semantic (knowledge and experience), syntactic (structure), and graphophonic (letters and sounds). By cross-checking cues as they read, students confirm their understanding*

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* Use clues in the pictures and in the context of the story (picture cues and context clues).
* Compare what they are reading to what they already know (prior knowledge).

Syntactic Strategies: Study sentence structure and identify unfamiliar words

* Look at verb tense and subject-verb agreement (grammar).
* Attend to predictable language patterns in written text (grammar).

Graphophonic Strategies: Associate spoken words with printed letters. Identify unfamiliar words.

* Sound out individual letters and letter combinations (letter sounds).
* Look at letter sequence and “chunks” of the word (letter patterns).

## Tackling Complex Text Using All Three Cueing Systems

1. Identifying Main Idea: Sometimes getting the *gist* is enough.

It is not always necessary for readers to understand every word. Sometimes struggling readers slow down comprehension by grappling with each word. This can be discouraging and stall momentum so that comprehension breaks down further. Teach students to determine the *gist* or essential idea of a passage.

2. Context Clues: When an Unfamiliar Word Really Matters

Writers provide clues in many forms within a text to help you uncover meaning. The words around a word are its *context* and carry hints to determine meaning. There are five types of context clues:

* **Example Context Clues:** Authors use examples and/or illustrations to show what a word means. These are not synonyms. Watch for:

Words/phrases like "such as," "including," or "consists of." Colons and dashes can signal examples.

## Sample Mini-Lesson for *Getting the Gist*

Learning Target: I can make connections between what I know and new information to make sense of complex text.

Review learning target. Students put in own words (Think-Pair-Share)

Teacher models; students record steps/strategies used

* Use first paragraph of (text) to model connecting what I know to unfamiliar words and phrases to make meaning from the first paragraph.
* Underline what I know and summarize with annotation. Circle unfamiliar words or phrases.
* State gist in my own words. Write in margin.
* IF I don’t get the gist, what do I do?
* Go back to circled items. Re-read, what does context tell you? What does it remind you of? Consult resource if necessary.
* Re-read paragraph and follow steps modeled
* Ask students: Did I meet the target? Explain your thinking. Students share any questions and identify strategies used; chart. Students apply what was modeled.

### 5 Steps for Using Context Clues

Step 1: Check for synonyms or definitions embedded right there. If you find one, reread the sentence with the new term keeping the synonym or definition in mind. Then tell yourself in your own words what the sentence is saying.

Step 2: Check for a contrast clue. If you find one, think about its meaning, telling yourself the opposite meaning. Then reread the sentence and rephrase it in your own mind.

Step 3: When you read a sentence that you have trouble understanding because of an unfamiliar word, reread the sentence and substitute a word that seems to make sense in the context.

Step 4: Read on. If the word you substituted does not make sense in the context of the rest of the paragraph, try again.

Step 5: If the sentence still does not make sense to you and you do not understand the main point, look for a synonym, definition, and contrast clue. If you are still uncertain, check a dictionary.

* + Example: Third grade was full of **precocious** children. One child was *reading at a high school level* and another had *written a collection of great short stories in first grade*.
* **Direct Definition Context Clues:** “Right there” definitions imbedded in the text.
  + Examples: There are many *tactics*, or strategies, teachers can use to support students.

*The word “strategies” tells us that tactics are different*

*approaches teachers can take.*

* + An *icon*, or symbol, is often used as a link on websites.

*The word “symbol” tells us what icons are.*

* **Synonym Context Clues:** Words around a difficult word that mean the same or almost the same as the word.
* Example: After hearing about their expedition, students felt *enthusiasm* or excitement for their learning.

*The word “excitement” tells us that enthusiasm means to be interested and happy.*

* **Antonym or Contrast Context Clues:** Words around a difficult word that mean the opposite or nearly the opposite as the word.
* Watch for contrast cues such as “on the other hand,” “in contrast,” “however,” etc.
* Example: Maria was *obstreperous* in class. Keeyon, on the other hand, remained quiet, in his seat and did exactly what was expected of him.

*The words “on the other hand” tell us Keeyon is unlike Maria. The words used to describe Keeyon help us understand that obstreperous is the opposite of doing following directions. Therefore it means unruly or resistant.*

* **Inference:** Getting the general sense of a sentence and using prior knowledge to determine meaning.
* Example: Brian could not *accommodate* more people in his car, so we had to walk.

*We can infer from the sentence that if some people had to walk, accommodate must mean or nearly mean “fit”*

**3. Word-Attack Strategies: Digging Into Problem Areas**  
Word-attack strategies help students decode, pronounce, and understand unfamiliar words, using all three cueing systems. They help students attack words piece by piece or from a different angle.

* Use Picture Clues
  + Look at the picture.
  + Are there people, objects, or actions in the picture that might make sense in the sentence?
* Sound Out the Word
  + Start with the first letter, and say each letter-sound out loud.
  + Blend the sounds together and try to say the word. Does the word make sense in the sentence?
* Look for Chunks in the Word
  + Look for familiar letter chunks. They may be sound/symbols, prefixes, suffixes, endings, whole words, or base words.
  + Read each chunk by itself. Then blend the chunks together and sound out the word. Does that word make sense in the sentence?
* Connect to a Word You Know
  + Think of a word that looks like the unfamiliar word.
  + Compare the familiar word to the unfamiliar word. Decide if the familiar word is a chunk or form of the unfamiliar word.
  + Use the known word in the sentence to see if it makes sense. If so, the meanings of the two words are close enough for understanding.
* Reread the Sentence
  + Read the sentence more than once.
  + Think about what word might make sense in the sentence. Try the word and see if the sentence makes sense.
* Keep Reading
  + Read past the unfamiliar word and look for clues.
  + If the word is repeated, compare the second sentence to the first. What word might make sense in both?
* Use Prior Knowledge
  + Think about what you know about the subject of the book, paragraph, or sentence.
  + Do you know anything that might make sense in the sentence? Read the sentence with the word to see if it makes sense.

**Appendix D: Additional Texts, Resources, and Extension Ideas**

**Additional optional resources (for teacher reference only; not included in specific lessons)**

* Library of Congress. *Articles of Confederation* overview. <http://www.ushistory.org/us/14b.asp>
* Article from the Atlantic Monthly 1886 on “The Weaknesses of the Articles of Confederation.” <http://digital.library.cornell.edu/cgi/t/text/pageviewer-idx?c=atla;cc=atla;rgn=full%20text;idno=atla0057-5;didno=atla0057-5;view=image;seq=585;node=atla0057-5%3A1;page=root;size=100>

1. Adapted from Choices for the 21st Century Education Program, Watson Institute for International Studies, Brown University. [www.choices.edu](http://www.choices.edu) [↑](#footnote-ref-1)
2. These materials draw on the work of Sam Wineburg and his colleagues at the Stanford History Education Group (sheg.stanford.edu) as well as Monte-Sano, De La Paz, & Felton's forthcoming book, *Building literacy in the history classroom: Teaching disciplinary reading, writing, and thinking in the age of the Common Core*. [↑](#footnote-ref-2)
3. The following protocols were adopted from Expeditionary Learning: elschools.org [↑](#footnote-ref-3)
4. Sources: <http://scc.losrios.edu> and http://wps.ablongman.com/long\_licklider\_vocabulary\_2/6/1626/416421.cw/index.html [↑](#footnote-ref-4)