

TEENAGERS DOING HISTORY OUT-OF-SCHOOL: AN INTRINSIC  
CASE STUDY OF SITUATED LEARNING IN HISTORY

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This intrinsic case study documents a community-based history expedition implemented as a project-based, voluntary, out-of-school history activity. The expedition's development was informed by the National Education Association's concept of the intensive study of history, its structure by the history seminary, and its spirit by Webb's account of seminar as history expedition. Specific study objectives included documentation of the planning, implementation, operation, and outcomes of the expedition, as well as the viability of the history expedition as a vehicle for engaging teenagers in the practice of history. Finally, the study examined whether a history expedition might serve as a curriculum of identity. Constructivist philosophy and situated learning theory grounded the analysis and interpretation of the study.

Undertaken in North Central Texas, the study followed the experiences of six teenagers engaged as historians who were given one year to research and write a historical monograph. The monograph concerned the last horse cavalry regiment deployed overseas as a mounted combat unit by the U.S. Army during World War II. The study yielded qualitative data in the form of researcher observations, participant interviews, artifacts of participant writing, and participant speeches. In addition, the study includes evaluations of the historical monograph by subject matter experts.

The data indicate that participants and audience describe the history expedition as a highly motivational experience which empowered participants to think critically, write historically, and create an original product valuable to the regiment's veterans, the

veterans' families, the State of Texas, and military historians. The study supports the contention of the National Education Association that the intensive study of history can be beneficial both to expedition participants and to their community. The assertion that engaging teenagers as researchers within a discipline serves as a curriculum of identity was supported in the study as well. The study underscored the importance of oral history as a gateway for learning about modern history.

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## TABLE OF CONTENTS

	Page
ACKNOWLEDGEMENTS .....	iii
LIST OF TABLES .....	viii
LIST OF FIGURES .....	ix
Chapter	
1. INTRODUCTION .....	1
Situated Learning	
The Intensive Study of History	
History Seminary	
Statement of Problem	
Need for the Study	
Purpose of the Study	
Research Questions	
Definition of Terms	
Assumptions	
Limitations	
Summary	
2. REVIEW OF LITERATURE .....	34
Constructivist and Social Constructivist Theory	
Situated Learning Theory	
Inquiry Learning in Education	
Inquiry Methods	

Students Thinking Historically

Conclusion

3. RESEARCH DESIGN ..... 70

Introduction

Purpose and Statement of the Problem

Research Questions

Research Design

Case Selection and Description of the Setting

Participants

Conduct of the History Expedition

Data Collection and Procedures

Analysis of Data

Summary

4. FINDINGS..... 124

Introduction

The Kickoff Meeting

Field Trip to National Museum of the Pacific War

Reading Oral Histories

Team Meeting 1

Attending the Regimental Reunion

Team Meeting 2

Team Meeting 3

Team Meeting 4

Research Trip to Texas Military Forces Museum

Team Meetings 5-7

Individual Interviews

Team Meeting 8

112th Cavalry Day

Team Meeting 9

A Second Living History Visit

The Memorial Day Ceremony

Team Meeting 10

The Writing Process

Team Meeting 12: Finalization of the Monograph

Publication

Audience Reviews of the HWB Project's Product

Summary

5. CONCLUSIONS, IMPLICATIONS, AND RECOMMENDATIONS..... 307

Summary of Findings

Introduction

Specific Findings

Conclusions

Implications

Recommendations for Future Research



Appendices

A.	PROJECT RECRUITMENT LETTER .....	369
B.	PARTICIPANT/PARENTAL CONSENT FORM .....	372
C.	PARTICIPANT ASSENT FORM .....	376
D.	ORAL HISTORY ANNOTATIONS AND EXCERPT .....	379
E.	REGIMENTAL RECORD EXAMPLE .....	388
F.	ARMY RECORDS EXAMPLE.....	390
G.	SIGNAL CORPS PHOTOGRAPH EXAMPLES .....	392
H.	COMBAT ART EXAMPLES .....	394
I.	ORAL HISTORY READING AND HIGHLIGHTING INSTRUCTIONS....	397
J.	PARTICIPANT PREFERENCE INVENTORY .....	399
K.	SAMPLE SUBJECT KNOWLEDGE INTERVIEW QUESTIONS .....	401
L.	PARTICIPANT INTERVIEW QUESTION EXAMPLE.....	403
M.	PROJECT AUDIENCE QUESTION EXAMPLES.....	405
N.	TEMPLATE FOR 112th CAVALRY DAY LEGISLATION .....	407
O.	PARTICIPANT PRIOR KNOWLEDGE OF RELATED CONTENT .....	410
P.	A SMALL LESSON IN THE PRACTICE OF HISTORY.....	420
	REFERENCES.....	423

## LIST OF TABLES

	Page
1. Interest categories for Kelley transcript by participant, frequency, and per cent .....	168
2. Interest categories for Fortenberry transcript by participant, frequency, and per cent.....	169
3. Positive interest categories for Kelley transcript by participant, topic, and highlight percentage frequency.....	171
4. Positive interest categories for Fortenberry transcript by participant, topic, and highlight percentage frequency.....	172

## LIST OF FIGURES

1. Floor plan of expedition work area..... 89

## CHAPTER 1

### INTRODUCTION

Inquiry learning is founded on a commitment to active investigation. In particular, it is a learning approach that unites phenomenon, interest, process, and product into a coherent, inseparable, activity. Inquiry seeks to shed light on the unknown or provide a deeper understanding of a known phenomenon. While inquiry can be implemented in a variety of ways, all forms of inquiry share a common commitment to answering questions through active research. Inquiry can be defined by: (a) the presence of questions, (b) the search for evidence, (c) necessary reflection with regard to the relationship of the evidence to the question(s), and (d) conclusions drawn as a result of the inquiry process. Since inquiry within an academic discipline reflects that discipline's culture as well as a commitment to specific ways of knowing, different disciplines inquire in different ways toward different ends. In other words, inquiry is a process steeped in the socio-cultural roots of a discipline's structure (Bruner, 1960; Schwab, 1962) or a community of practice (Lave & Wenger, 1991).

Inquiry as a form of learning is particularly interesting to the field of history instruction. For years, students have complained that history is boring. From the students' perspective, history is all about memorizing facts, doing textbook worksheets, and preparing for examinations (Schug, 1982). Students find traditional methods of instruction in history classes boring and the subject matter irrelevant (Yarema, 2002). As early as 1984, Goodlad observed that social studies classes, the home of history in the majority of America's public schools, infrequently made use of activities other than those involving reading and writing in a narrative fashion. While social studies teachers

were committed to the importance of critical thinking within their curriculum, their tests, most often only requiring lower order thinking at the knowledge level, did not reflect that reality (Goodlad, 1984). Twenty years later, Wineburg (2004) determined that little has changed.

Not only do students find history boring and irrelevant as taught in their schools, there is a problem with United States students performing well on national tests of United States History. Relatively static scores by high school students on National Assessment of Educational Progress (NAEP) history assessments in 1994 and 2001 reveal a weakness at the high school level of social studies (Ravitch, 2002; Patrick, 2002). Used as an indicator of student achievement within the United States, NAEP scores have become the litmus test for school reform measures. Clearly, neither traditional methods of teaching history nor high stakes testing seem to have led to improvement on NAEP test scores at the high school level from 1991 through 2001.

The NAEP assessment categorizes student performance with regard to proficiency, or the U.S. Department of Education's preferred level of competence. Results of the 2001 United States History assessment revealed 18% of fourth graders, 17% of eighth graders, and 11% of twelfth graders performing at or above the Proficient level (Lapp, Grigg, & Tay Lim, 2002). A different interpretation of the same data is that of the students tested on NAEP's 2001 United States History Assessment, 82% of fourth graders, 83% of eighth graders, and 89% of twelfth graders were unable to meet performance standards that would qualify them as being Proficient as determined by the U.S. Department of Education. In light of the continuing inability of the majority of high school students to demonstrate proficiency on NAEP assessments of historical

knowledge, it would appear that traditional methods of history instruction display weaknesses with regard to higher-order historical thinking as assessed by the NAEP 12th Grade United States History Assessment. Results of the 2006 NAEP United States History Assessment were released on May 16, 2007. A greater, and statistically significant, number of twelfth graders were able to perform at the Basic level on the assessment, however, the increase in students able to perform at the Proficient and Advanced levels, was not statistically significant (Lee & Weiss, 2007). In light of evidence that inquiry methods of instruction have proven capable of improving students' higher-order thinking skills (Kelly, 1999, Zohar & Dori, 2003; Lord & Orkwiszewski, 2006) and motivating students (Cole & Lacefield, 1980; Nicholls, Nelson, & Gleaves, 1995; Ropp, 2003), its application to the history education of teenagers is worthy of study.

To engage in inquiry in history would be to engage with the accepted practices, values, and commonly held beliefs of a community of practice (Lave & Wenger, 1991). The inquirer would learn not only about the discipline of history but, also, about themselves (Schwab, 1962; Lave & Wenger, 1991; Wenger, 1998a). Wenger (2004) has gone as far as to assert that inquiry is as much a search for oneself as it is a search for an answer to a question. Emphasizing that notion, Wenger asserts that when inquiry is placed within the context of formal schooling, it leads to what he has called "a curriculum of identity."

According to Wenger (2004), a curriculum of identity could be enacted through specific courses in senior high school. He challenged the teachers of those courses to invite students to spend a year participating as co-researchers within their community of

practice. By welcoming students as participants within the community of practice, teachers could provide students an insider's view of the discipline. As student and teacher researched a narrow subject to a great depth, they would learn not only about the narrow subject, they would also learn about the community of practice and themselves. This approach would give every high school student the opportunity to become an expert in a narrow field. Since the inquiry process would provide each student the opportunity to negotiate their level of participation within the community, it would also provide valuable information to the student concerning their personal strengths and weaknesses as well as their likes and dislikes. Wenger's ideas were similar to Schwab's (1962) notion of invitations to inquiry within science, and a much earlier proposal concerning the "intensive study of history" as explicated by the National Education Association's (NEA) Committee of Ten, in 1893.

The NEA formed the Committee of Ten to recommend a general curriculum for high schools throughout the United States (NEA, 1893). Its subcommittee on the history curriculum met in Madison, Wisconsin, and gained the nickname "the Madison Committee." While many of the Madison Committee's recommendations were incremental in nature, one was revolutionary. It called for creating a new history course that would be offered during a student's senior year. The course, described by the NEA (1893) as the intensive study of history, was to be one year in length, involve teacher and students as co-researchers, focus on a narrow subject to a great depth, have no text other than sources dealing with the research subject, and was to provide students an idea of the kind of history research engaged in by students at the finest universities in the United States (p. 162). The objectives of the course were for students to: (a)

engage in collaborative inquiry in history, (b) learn about the discipline of history, (c) learn a skill that could help them individually and could be applied to help society, and (d) see how history was done at the collegiate level (pp. 176-177). An idea well ahead of its time, the intensive study of history was almost prescient with regard to later ideas concerning inquiry (Schwab, 1962; Bruner, 1968; and Wenger, 2004). Unfortunately, the potential the intensive study of history held was turned into a ghost of its former self when gutted by the Committee of Seven of the American Historical Association (AHA) (AHA, 1915). The Committee of Seven damned it with faint praise, recommended it as an opportunity for classroom exercises, and denied the ability of students and most of their teachers to engage in original research and inquiry in history.

In the 103 years since the Committee of Ten recommended the intensive study of history, there are no reports documenting its application in America's high schools. Similarly, there are no reports documenting teenagers engaged in situated learning in history. Consequently, there is a gap in the literature regarding the effects of engaging teenagers as historians in a yearlong history investigation according to the NEA's intensive study of history model. Similarly, there is a gap in the literature regarding the effects of engaging teenagers as participants within the community of practice of history (Lave & Wenger, 1991; Wenger, 1998a, 1998b, 2004). In a nation in which the majority of high school seniors tested on the National Assessment of Educational Progress (NAEP) United States history assessment cannot meet the recommended performance standards of the federal government (Patrick, 1997, 2001), any gap in the literature concerning alternative methods of history instruction should be taken seriously. This case study documents a community-based demonstration of the intensive study of



history (NEA, 1893) as viewed through the lens of situated learning (Lave & Wenger, 1991) and Wenger's (2004) associated curriculum of identity.

### Situated Learning

Within the last 30 years, the body of literature concerning the socio-cultural aspects of learning has grown considerably and has developed into theory. The theory associated with situated cognition deals specifically with the importance of culture and context in the learning process (Illich, 1970; Goodenough, 1976; Bandura, 1977; Vygotsky, 1978; Lave, 1977, 1982, 1985, 1988, 1988, 1991; Rogoff & Gauvain, 1984; Rogoff & Lave, 1984; Brown, Collins & Duguid, 1989; Rogoff, 1990; Lave & Wenger, 1991; Wenger, 1998a, 1998b; Barab & Duffey, 2000; Barab & Hay, 2001; Barab & Plucker, 2002; Barab, 2006). Convinced of the importance of situating learning within an environment that employs social engagement and authentic context as a prerequisite for naturalistic learning, these researchers have developed, and continue to develop, situated learning theory. While situated learning as a specific body of theory owes its more recent explication to the field of cultural anthropology, it was not the first modern field to address natural ways of learning. The roots of situated learning can be seen in the work of progressive educators at the beginning of the 20th century such as Dewey (1916, 1933, 1938) and Kilpatrick (1918), as well as the revolutionary humanists Illich (1970) and Freire (1970) of the 1970s.

Early critics (Dewey, 1916, 1933, 1938; Kilpatrick, 1918) of formalized schooling in the 20<sup>th</sup> century sought to improve the public schools through progressive reform. Dewey (1933) saw the reflective thinking associated with problem solving as the surest form of learning since humans, by their very nature, went through life solving problems.

To Dewey (1938) and Kilpatrick (1918), however, school-bound problems with textbook solutions were a poor substitute for the real life problems humans dealt with on a daily basis. Instead, they sought to institute new curricula and methods of instruction that would lead to more natural forms of learning. They wanted the classroom to be an extension of the community and for students to learn by addressing age-appropriate variants of the same problems adults in the community dealt with on a daily basis (Dewey, 1916; Kilpatrick, 1918). Champions of school-based public education, although not necessarily its existing beliefs and methods, Dewey (1933, 1938) and Kilpatrick (1918) sought to institute changes in the public schools that would develop problem based, project oriented approaches to learning that could provide social context to the curriculum. They viewed the community as a powerful asset for learning and advocated that schools should integrate the community into the classroom to the greatest extent possible.

Later critics were less supportive of public schools and the idea of compulsory education. Using an analytical lens of radical liberalism (Lichtenstein, 1985), Illich (1970) and Freire (1970) assailed schools as places of indoctrination and disempowerment and called for the “deschooling” (Illich, 1970) of society. Both Illich and Freire were staunch Roman Catholics who sought to liberate the disenfranchised from their empty lives. Having witnessed the growth of revolutionary Marxism in Latin America, a revolution in the thinking of the Roman Catholic Church during the Second Vatican Council (1963-1965), and the development of liberation theology Illich and Freire wrote at a time when improving the lives of the poor and the oppressed meant empowering the people (Lichtenstein, 1985). To Illich and Freire, the school was an arm

of the government which served to propagate government policy and perpetuate the power of the ruling elite. By submitting to compulsory schooling, citizens unknowingly abdicated their right to educate themselves. As a result, their skill and ability to learn independently atrophied and left them powerless in the face of the ruling class. Illich (1970, p. 1) urged governments to disestablish, to separate, schools from the government and to view education as a lifelong process, a process centered in the community and making use of community resources outside the school. His vision called for a rich supply of educational alternatives to formal school, and maximizing informal resources such as museums, libraries, interest groups, and at its core, learning webs (p. 72-105). Freire (1970) called for sweeping changes in nations' paradigms of public education. According to Freire, education is not about memorizing facts, or banking inert data for later use. Instead, education is the empowerment of people to construct their own understanding of the society and culture in which they live, an understanding based on their experience and the experience of their peers, not a simplistic explanation offered by a textbook. Both Illich and Freire situated the learning process in the people of the community, advocated that understanding should be socially constructed by the learner in concert with others, and that the knowledge gained through experience by the learners was the starting point for any understanding of a phenomenon. While the social agenda developed by Freire and Illich was different from that of the Progressives like Dewey, they had a number of elements in common. Three of those common beliefs were that: (a) the pre-existing empirical knowledge of the learner was the starting point of learning; (b) the objective of education is the creation of citizens who are empowered to think critically, express themselves, and play

active roles in initiatives of self-determination; and (c) all learning should be situated in the community, directed to solving problems extant within the community, and involve the resources of the community.

More than a quarter-century after Illich (1970) published his work, a new voice called for locating education within the shared resources of the community in addition to schools. Sharing Illich's belief that schooling is but one example of education, and a poor example at that, Martin (1996) argued that society's cultural wealth is too vast, too diverse, and too important to be left to one institution--the school--to pass on to future generations. Arguing that there is too much to teach, Martin called for a realization that educational agency is a shared responsibility of all institutions within a community, not just schools. In her belief that museums, churches, community groups, and families, to name but a few, were better suited to passing on specific portions of a society's cultural wealth than were schools, Martin would have stood alongside Dewey, Kilpatrick, Illich, and Freire.

At the same time Illich and Freire were addressing the unequal apportionment of power in the world's lesser-developed nations, the field of cultural anthropology was studying the development of man, culture, and society in those same lesser-developed nations. While cultural anthropology was interested in a wide range of phenomena, the areas of non-formal and informal education rapidly drew the attention of several researchers. The informal and non-formal education practices of West African tailors (Lave, 1977), African blacksmiths (Lancy, 1980), secret African societies (Studstill, 1979), and Guatemalan children (Rogoff, 1981) were of interest to the cultural anthropologists. Their objective was to illuminate how individuals learned in the absence

of schools in many of the rural backwaters of underdeveloped regions. The field embraced informal learning, that learning which occurred outside of school, as the most natural and effective means of promoting cultural learning in a society. Similar to Dewey's (1916, 1933, 1938) earlier observations, cultural anthropologists observed that learning occurs naturally, and is not tied to a specific location in the community or institution. Long before cultural anthropologists addressed the issue, Dewey (1938) had advanced the same argument, however, it was the cultural anthropologists who presented proof in the form of rich, detailed, and extensive case studies and ethnographies associated with learning outside of school (Lave, 1977, 1982, 1985, 1988, 1988, 1991; Rogoff & Gauvain, 1984; Rogoff & Lave, 1984; Brown, Collins & Duguid, 1989; Rogoff, 1990; Lave & Wenger, 1991; Wenger, 1998a, 1998b).

By way of identifying how formal education, or schooling, differed from the informal education observed in areas not tied to the Western industrial model, cultural anthropologists observed that the objectives and environment associated with formal schooling removes learning from its naturally occurring cultural context (Rogoff, 1990; Lave & Wenger, 1991). Employing the transmission of knowledge paradigm of learning, schools employ methods of direct instruction to deliver deconstructed, abstract, and inert bodies of knowledge (Lave & Wenger, 1991). Applying instructional methods informed by behavioral psychology, formal schooling emphasizes behavioral objectives, direct methods of instruction, frequent objective tests, and systems of accountability designed to alter unwanted behaviors. Consequently, it has been charged that school learning is but a pale reflection of authentic disciplinary activities undertaken by participants within a community of practice (Brown, Collins & Duguid, 1989; Lave

&Wenger, 1991). While never saying that formal schooling is wrong, situated learning theorists advanced the idea that schools do not prepare students for life outside of school. Instead, schooling does nothing more than prepares students to be successful in school (Brown, Collins & Duguid, 1989; Lave & Wenger, 1991).

As they developed theory based on their observations, cultural anthropologists developed ideas about education that were very different from those held in conventional pedagogy. In contrast to industrial models of education which situated learning in a school hierarchy under centralized control, provided professional teachers, and followed a curriculum developed in service to the state, cultural anthropologists developed a model of education that was decentralized, enabled through mentoring by expert practitioners, and followed a loose curriculum in service to the learner. That model became known as situated learning. At the level of the learner, traditional learning theorists place cognition squarely inside the individual while, in contrast, situated learning theorists place cognition within the interaction between the learner and the environment (Moore, 1998). In other words, knowledge is inert and devoid of meaning until given context by the social, physical, and task-related aspects of the learning environment. In such a socially constructed view of learning, it is possible to think of intelligence as being distributed throughout the environment and not just in the head of the individual (Pea, 1990; Barab & Plucker, 2002). With such a view of cognition, it becomes possible to think of intelligence as existing in one's peers, in the tools one uses to accomplish a task, and in the values and beliefs of the community within which one operates. For situated learning theorists, intelligence should not be

measured at the level of an individual, instead, intelligence is a result of distributed cognition within a community of practice.

Situated learning engages learners as participants within a community of practice and provides them learning opportunities with immediate application. Theorists of situated learning advocate that if something is to be taught, its instruction should be “situated” within an authentic context, and that learners engage by doing the craft (Brown, Collins & Duguid, 1989; Lave & Wenger, 1991). As learners participate in authentic performances commonly observed within the community of practice, experienced practitioners provide support and guidance. It is through the help of these experienced mentors that novices advance beyond their native abilities; an idea congruent with Vygotsky’s (1978) theory of the zone of proximal development. It is stressed that the situated learning environment should most closely resemble that experienced by a practitioner within the community of practice and that learners should have access to those resources commonly available to practitioners (Lave & Wenger, 1991; Wenger, 1998a). Within situated learning, learning is not measured by tests; instead, it is exhibited by the growth, or change in position with regard to one’s participation within the community of practice. A student’s growth, or learning, becomes visible as his/her trajectory within the community changes from that of peripheral participant to a more central position within the community of practice (Wenger, 1998a, 1998b). In contrast to compulsory education, in situated learning there is a sense of free choice learning or voluntary engagement. The example of master and apprentice within a workshop has often been used to describe the process of situated learning and has led to the development of the paradigm of cognitive apprenticeships (Collins, Brown, &

Newman, 1989; Collins, Brown, & Holum, 1991). In the same way that an apprenticeship is an intensely individual experience, situated learning is a deeply personal experience as well.

Central to situated learning theory is its relationship to identity. According to Wenger (1998a, 1998b) learning in non-formal settings is an activity of identity development. The measure of an individual's progress within situated learning is the relative change exhibited by the learner with respect to peripheral versus central participation within the community of practice. Since learning in non-formal and informal environments alike are rarely compulsory, situated learning gives individuals the ability to participate on the peripheries of several communities of practice, pursuing only those that hold meaning for them while stopping participation in others (Wenger, 1998b, 2004). While the voluntary nature of non-formal and informal learning make their methods a poor fit to today's institutions of compulsory education, Wenger (2004) suggests one way to implement situated learning in school might be to offer opportunities for situated learning across a number of disciplines during a student's senior year. Under such a scenario, students might approach learning opportunities buffet-style and pursue participation within those communities that best suit their perceived needs and desires. It was just this idea that caused Wenger (2004) to propose the curriculum of identity.

Wenger (2004) proposed engaging high school students in learning by having each teacher welcome them as participants into the teacher's disciplinary community of practice. By engaging students as co-researchers, a teacher could introduce them to the discipline as an insider might understand it. All of the excitement, wonder, and



satisfaction felt by the teacher-participant might be felt by the student-participant if s/he jointly engaged in authentic disciplinary learning focused on advancing the student-participant's standing within the community of practice. Wenger challenged teachers to enact a curriculum of identity that offered a teenager the opportunity to investigate a narrow topic to a great depth and feel the satisfaction of being acknowledged as an expert within a community of practice. Although Wenger's idea of a curriculum of identity was advanced in 2004, it could easily have found a friend in Bobbitt (1941) who said, "The school is not to 'make' a curriculum but to help the child or youth better to find his own. The school's job is not to process the child into a shape that it has planned for him. It is to recognize that a life is going on before its eyes, and its work is to help in making that life go on in the best possible way" (p. 321). Listening to Wenger advance the idea of a curriculum of instruction at the annual meeting of the American Educational Research Association in 2004, I found Wenger's idea particularly exciting because within history education there already existed an instructional model fit for application. The model was informed by both the concept of the intensive study of history (National Education Association, 1893) and the history seminary (H.B. Adams, 1887; C.K. Adams, 1889) as undertaken in the spirit of a history expedition (Webb, 1955).

### The Intensive Study of History

A little over a century ago, secondary education in the United States (hereafter referred to as America) was undergoing a paradigm shift. For much of the 19th century, secondary schools focused on preparing students for college. Consequently, American secondary schools served but a minority of the population (Bohan, 2003). As America

began to prepare for its entry into the 20th century, however, the demographics of its secondary schools began to change. By 1890, education had become compulsory in 63% of the states, and, by 1918, 100% of the states required their children to attend school (Watras, 2001). Waves of immigration brought new citizens to America and created a need for institutions of assimilation on a societal scale. The economy demanded an ever-growing amount of trained and skilled labor in order to function efficiently. Within such an environment, secondary schools were tasked with fulfilling different and often contradictory roles. In one role, they were to train the work force of the future. In a second role, they were to act as the melting pot that would become the engine of assimilation for America. In their third role, they served as they always had as college preparatory schools (Watras, 2001). In response to the need for a curriculum that would satisfy these sometimes-divergent objectives, the finest minds in American education at the time were called upon to chart a course (Bohan, 2003). Two separate initiatives fulfilled this objective. The first initiative was sponsored by the National Education Association (NEA) and dealt with the nature of the secondary curriculum in general. The second initiative, undertaken three years after that of the NEA, was sponsored by the American Historical Association (AHA) and dealt specifically with the history curriculum in secondary schools. When their recommendations were delivered in the last decade of the 19th century, it set the course of high school history education in America for the next one hundred years (Bohan, 2003).

The NEA chose to enact their initiative through the creation of the Committee on Secondary School Studies (hereafter referred to as the Committee of Ten). Charged with investigating the curricular needs of America's secondary schools, it first met in

1892 and soon formed ten different subject oriented subcommittees (National Education Association [NEA], 1893). Of particular interest to this study, the subject area of history was investigated by the subcommittee on history, civil government, and political economy also known as the Madison Committee. The Madison Committee's recommendations concerning the history curriculum were incorporated in the final report of the Committee of Ten (NEA, 1893), and reflected the view that every individual was entitled to education befitting a college-bound student. In that spirit, the Madison Committee recommended high school students be introduced to college-level historical investigation in their senior year. That recommendation, described by the committee as the intensive study of history, was both radical and controversial. As opposed to the other 35 evolutionary recommendations made by the Madison Committee, the intensive study of history was a revolutionary recommendation. Whereas the committee's other recommendations dealt with relatively minor modifications to the existing curriculum, the recommendation concerning the intensive study of history called for the creation of a new course, a redefinition of the commonly accepted teacher-student relationship within that course, new methods of learning, and new textual sources. The fact that it was controversial should be of no surprise in light of the revolutionary nature of the proposal.

The Madison Committee's description of the intensive study of history included the recommendation that the course be one year in length and that it involve research based on sources other than a textbook. The committee recommended that the teacher determine the research topic based on availability of sources, available expertise in the subject area, and the interests of the students. Contrary to the survey-like history courses provided the student until their senior year, the intensive study of history

involved both teacher and students in a joint investigation of a history topic narrow in scope. It was the opinion of the committee that “[t]his will offer an opportunity to apply, on a small scale, the kind of training furnished by the best colleges; it will teach careful, painstaking examination and comparison of sources; it will illuminate other broader fields of history; and it will give the pupil a practical power to collect and use historical material, which will serve him and the community throughout all his after life” (NEA, 1893, pp. 176-177). By referencing college-level history, the earliest level of education where students engaged in original research, the Madison Committee implied that high school students be given the opportunity not only to consume history, but to construct history as well. An educator reading their statement today is struck by the goals they hoped to achieve through this particular curriculum change. Through one year’s intensive study in history, the Madison Committee hoped to: (a) interest and motivate students, (b) develop skills of critical thinking and analysis, (c) build bridges between the particular period studied and other, broader periods in history, (d) empower the teenager to perform historical analyses, (e) provide a college-level experience to high school students, and (f) develop the individual as community member and citizen. As is the case with many new ideas in education, the recommended change was long on potential, but short on specifics of how the intensive study of history should be implemented. The committee provided, however, some clues concerning their thoughts on implementation by referencing as a standard “the kind of training furnished by the best colleges” (p. 177). Their explicit solution was to introduce into high school the method of history training used in America’s colleges, albeit modified for what educators

today would call developmentally appropriate application. At that time, the method of teaching historical inquiry at the college-level was the history seminary.

### The History Seminary

In the late-19th century, the collegiate method for training historians was the history seminary, an excellent match for use in a modified form in the intensive study of history in America's high schools. A forerunner of today's seminar technique, the seminary in history was described by Yale University history professor, George Burton Adams (1905). Outlining the methods used in "historical seminaries," Adams began his article by saying:

The primary object is not to teach the facts of history but to teach the correct methods of dealing with the raw material from which the facts must be determined; of first judging its character and value; then of extracting from it all that it has to tell us, and not more than this; of determining as accurately as possible the degree of probability which attaches to the result; and finally combining the conclusions reached into a systematic and comprehensive whole. An essential characteristic of the work is the practice of these methods together by a number of students of about the same stage of advancement, and the resulting mutual criticism and stimulus of mind by mind. Any process by which the same results are reached in the individual student by himself, however effective it may be in scholarly training, is not properly to be called seminary work. (p. 522)

While the description by George Burton Adams of the objectives and general structure of the seminary were illustrative, to some it did not capture the spirit of the endeavor and the internal relationships of its participants. The inability of non-participants to describe the spirit of a history seminary was commented on by another Adams, Herbert Baxter Adams. Known for his successful implementation of the history seminary at Johns Hopkins University, Herbert Baxter Adams (1884) observed "It is easy thus to outline a few external characteristics of the seminary, but difficult to picture its inner life" (p. 107). In other words, objective description did not capture the soul, or spirit, of a

history seminary in action. It took nearly another 70 years before the spirit of the seminary was placed into words. This was accomplished when frontier historian Walter Prescott Webb (1955) described the working relationship of professor to student and the responsibilities of each in a paper in the *American Historical Review*.

According to Webb's (1955) description, the truly great seminars were the result of an 'inner purpose, the great program, and the dominating idea of him who conducted it" (p. 3). Webb explained that the seminar was similar to an expedition into unknown territory, undertaken by an expedition leader who was supported by other expedition members. The leader of the expedition was the person with the plan; the other members of the expedition were individuals necessary to the successful completion of the expedition. "This leader has that which makes him the leader--that is, an idea of the destination. He does not know that he can reach it, or the nature of the obstacles in the way, or what it will be like when he does reach it, but the idea dominates him and makes him hazard the risk" (p. 9). Webb asserted that in a history seminar the teacher was the expedition leader and the students were expedition members who provided the wherewithal by which the expedition progressed. In the same way an expedition of discovery depended on its members performing their jobs and mapping the expedition's progress through formerly unknown territory, a history expedition depended on its students to explore unknown territory consisting of resources as yet unexploited with regard to the research topic. Similar to an expedition of discovery in which explorers return to camp each night and share their insights around the campfire, members of a history expedition gather not around a campfire, but the seminar table to share what they have learned (Webb, 1955). That Webb's description of the inner workings of a

seminar is an accurate reflection of Herbert Baxter Adams' concept of the seminary was made explicit in recent years by the American Historical Association (2004). Popular in colleges at the time of the Madison Committee's recommendations, the seminary as described by Adams and Webb seems a viable candidate, in modified form, for what the Madison Committee meant when they said the intensive study of history in high school "...will offer an opportunity to apply, on a small scale, the kind of training furnished by the best colleges" (NEA, 1893, pp. 176-177).

To the author, there is attractiveness to the intensive study of history as described by the Madison Committee (NEA, 1893), given form by H.B. Adam's (1884) history seminary, and charged with spirit and intent by Webb's (1955) simile of the expedition. In today's educational language, they describe a social cognitive approach to learning that is experientially based and the focus of which is the construction of understanding in history. The Madison Committee was prescient with regard to their recommendation that teenagers spend time involved in historical inquiry. It offered the opportunity for active, student-centered learning as a byproduct of meaningful experience (Dewey, 1933; Kilpatrick, 1918). The Madison Committee's recommendation concerning the intensive study of history predated other recommendations for the inquiry learning method in history by more than 50 years (Taba, 1963; Schwab, 1963; Holt, 1990; Levstik and Barton, 2001; Krajcik, Blumenfeld, Marx, Bass, Fredricks, & Soloway, 1998; Polman, 2000; Schneider, Krajcik, & Marx, 2002). By emphasizing its social nature and its vocational purpose, Adams' description of the history seminary resonates within the context of social constructivism (Vygotsky, 1978), cognitive apprenticeships (Collins, Brown & Newman, 1989), and situated learning theory (Lave &

Wenger, 1991). By highlighting the shift in power accrued to students as a result of the intensive study of history, the Madison Committee foreshadowed Freire's (1993) resistance to the banking concept of education as well as Wenger's (2004) concept of a curriculum of identity. The Madison Committee's commitment to depth of instruction and the use of primary sources and documentary evaluation was nearly a century ahead of other calls for the same (Levstik, 1986; Bradley Commission, 1988; Ravitch, 1997, 1998; Wineburg, 1991; Formwalt, 2002). In retrospect, the recommendation by the Madison Committee for what amounted to a high school history seminary was revolutionary and held great promise.

Unfortunately, the intensive study of history did not survive its birth. The Madison Committee's recommendation concerning the intensive study of history was buried deep within the NEA's (1893) final report. Unlike many of the Madison Committee's 35 other recommendations, it was not included in the Committee of Ten's summary recommendations located at the front of the NEA final report. As inconspicuously located as it was, however, it did not remain unnoticed. The Madison Committee's recommendation concerning the intensive study of history gained enough prominence to be specifically addressed by the American Historical Association's Committee of Seven (AHA, 1915) five years later.

The AHA formed the Committee of Seven to develop recommendations concerning the history curriculum in the secondary schools of the America as well as college entrance requirements as they pertained to the subject of history. Contrary to the idealistic views of the NEA concerning the benefits of college-level instruction for high school seniors, the AHA committee took both a more pragmatic and professionally



protective view than did the NEA committee. The Committee of Seven's (AHA, 1915) final report rejected the intensive study of history as a recommended method of history instruction in the public schools. Displaying a pragmatic sense, they cited a shortage of teachers trained in historical research, a shortage of historical sources, and the inability of teenagers to engage meaningfully in history as historians. While the Committee of Seven supported the limited use of primary and secondary sources in America's high schools as an adjunct to a history text, they did so with the stated belief that there were issues that would make such learning difficult in classrooms of the time. The analysis of primary sources was reported to require too much time to include in the curriculum, and "it throws upon the pupils an undue responsibility beyond their years and understanding" (pp. 111-112). With regard to teachers being able to effectively employ primary sources in their classes, the Committee of Seven reported, "it seems doubtful whether all the teachers know what is meant by 'sources,' or understand where to stop in using them in connection with busy school work" (p. 111). Furthermore, contrary to the position of the Madison Committee, the Committee of Seven thought it important to stipulate that using the phrase "intensive study" did not imply original research as experienced in "advanced college classes" (p. 111). Instead, it simply meant studying a shorter period of interest for a longer time. In referring to history seminary work as laboratory work, the Committee of Seven further clarified their position:

We do not ask that pupils should be required to do so-called 'laboratory work'—we abjure the phrase—and create histories out of absolutely unhewn and unframed material; we simply say that if a pupil is taught to get ideas and facts from various books, and to put those facts together into a new form, his ability to make use of knowledge is increased and strengthened (AHA, 2006, p. 3).

The Committee of Seven (AHA, 1915) made clear:

By intensive study we do not mean original work in the sense in which the word 'original' is used in advanced college classes; we mean simply the careful and somewhat prolonged study of a short period. The shorter the period and the longer the time devoted to it the more intensive the study will be...it may prove possible to give two or three weeks instead of two or three days to a study of the important events...When this plan of selecting a period or a topic for intensive examination is possible, the pupils can gain great advantage by the opportunity of delving deeper into the subject than is possible when all parts of the work are studied with equal thoroughness or superficiality; they can read more in the secondary material, can get a peep at the sources, and thus come to a fuller appreciation of what history is and how it is written. Only when good working facilities are at hand, however, and the teacher, knowing the material, has time to guide his pupils and give them constant aid and attention, will this plan prove very helpful (pp. 111-112).

America's historians, as represented by the AHA, had made it clear that the public schools of the United States, as represented by the NEA, were not a fertile ground for the implementation of the intensive study of history as recommended by the Committee of Ten (NEA, 1893). From the time the Committee of Seven rejected the intensive study of history as a recommended method of history study in the public schools, the idea of a year-long course emulating the activities of the college history seminary at the high school level has disappeared from the literature.

The reports from the NEA's Committee of Ten and the AHA's Committee of Seven set the course of history instruction within America for the next century (Bohan, 2003). Without the intensive study of history as a recommended method of instruction, students lost the opportunity to engage in history in a seminary-like environment, an environment that held such meaning that the standard history curriculum had as its foundation survey courses in American and world history. Designed for breadth of coverage as opposed to depth of coverage, the history curriculum remained remarkably immune to instructional change. Contrary to the hopes of the NEA and AHA, high school history remained focused on the acquisition of factual knowledge. Attempts to

reform history teaching by the Progressives early in the 20th century were unsuccessful. Likewise, attempts by the New Social Studies movement to introduce the inquiry method of instruction never gained the success in history that it did in the sciences in the latter half of the 20th century (Dow, 1991). From the time of the Committee of Ten to this day, history maintains its reputation among students and the public as a subject area that is boring, teacher-centered, and invested in subject matter irrelevant to students (NEA, 1893; AHA, 1915; Wineburg, 2001). Their high school history experience has convinced students that engaging in history means listening to lectures, reading the textbook, memorizing inert factual assertions, and taking tests (Ravitch & Finn, 1987). In fact, the prevalence of such direct methods of history instruction across the last century has caused researchers to refer to them as the traditional methods of history instruction (Goodlad, 1984; Yarema, 2002; Wineburg, 2001). Yet, these traditional methods of history instruction yield graduates who are unable to recall basic knowledge as evidenced by several assessments of historical knowledge in the last century (Wineburg, 2001, 2004).

In spite of literature rich with regard to instructional methods in social studies and history, this researcher has been unable to identify research associated with the implementation of a program in the intensive study of history (NEA, 1893) along the lines of a high school history seminary from that day until now. Simply said, there is a gap in the literature. Nowhere are found reports concerning the implementation and outcomes of year-long programs for teenagers engaged as historians according to the model of intensive study described by the Madison Committee (NEA, 1893) and further defined by G.B. Adams' (1905) description of the outward trappings of a history

seminary as well as Webb's (1955) description of the inner workings of the history seminary.

### Statement of Problem

For more than a century, the traditional model of instruction has defined history teaching in the public schools of the United States. For much of that century, it has been charged that United States teenagers display a disheartening level of historical illiteracy regarding the facts of both United States and world history. In addition, students report that the history they are taught in school is boring and irrelevant. Furthermore, traditional methods of history instruction seem unable to provide a majority of high school seniors the ability to perform higher-order historical thinking as assessed by the NAEP 12th Grade United States History Assessment. In short, evidence suggests that the traditional history curriculum of America's high schools is unsuccessful in meeting the personal needs of the students, as well as the goals of history education as perceived by various segments of American society. For the last century, however, an alternative learning model for history has remained outlined but unstudied. When first recommended, the intensive study of history model held the promise for engaging teenagers as practitioners within the discipline of history. In so doing, teenagers would learn how to: (a) critically employ historical sources, (b) relate their narrow investigation to other parts of the discipline, and (c) develop the ability to use history for the benefit of the community and themselves. In spite of an extensive review of the literature, records of the model being implemented at the high school level have yet to be identified. The implementation, operation, and results of the intensive study of history model

implemented with high school-age students remains critically unexamined in spite of the need to explore alternative methods of history instruction.

### Need for the Study

Over a century ago, the Madison Committee suggested that the intensive study of history held potential for providing high school students an opportunity to participate in the kind of history education furnished by colleges; to learn the techniques of the historian, and to practice history. In the process, teenagers would learn about “other broader fields of history; and it will give the pupil a practical power to collect and use historical material, which will serve him and the community throughout all his after life” (NEA, 1893, p. 177). Unfortunately, in spite of its educational promise, the intensive study of history as described by the Madison Committee has never been adopted. Thought to be beyond the abilities of teenagers, as well as their teachers, and requiring sources in short supply, the intensive study of history fell from the mainstream of high school history education. In the last century, however, circumstances have changed. Cognitive learning theory now supports the constructivist approach of the history seminary enacted as expedition. In addition, the proliferation of archives, research libraries, museums, and other venues for historical inquiry provide access to rich sources of primary and secondary material. The number of historians working in those venues as well as local universities and colleges has increased dramatically. Based on the foregoing, it would seem an opportune time to examine the viability of the history expedition as a way of engaging teenagers in the practice of history. Unfortunately, there is a gap in the literature with respect to research on the experience of implementing history expeditions with high school age youth. The research base directly

examining the implementation of a history seminary or history expedition as described in operation by the Madison Committee, in intent by Adams, and in spirit by Webb, is nonexistent. In order for that gap to be reduced, in order for the promise of the intensive study of history to be examined, it must first be implemented and studied.

### Purpose of the Study

This intrinsic case study documents the implementation of a community-based demonstration of a history expedition. Implemented as a project-based, voluntary, out-of-school approach to practicing history, its development was informed by the Madison Committee's (NEA, 1893) concept of the intensive study of history, its structure by the nineteenth-century collegiate history seminary (Adams, 1887), and its spirit by Webb's (1955) account of seminar as history expedition. As with any intrinsic case study stemming from a critical instance, it is important to capture elements of the experience that fundamentally illustrate the activity and its outcomes. Specific study objectives include documentation of the planning, implementation, operation, and outcomes of the expedition, as well as the viability of the history expedition as a vehicle for engaging teenagers in the practice of history. Finally, the study examines to what degree a history expedition might serve as a curriculum of identity (Wenger, 2004). Constructivist philosophy and situated learning theory will ground the analysis and interpretation of the study.

### Research Questions

The research questions guiding this case study were:

1. How do participants and audience describe the history expedition experience?
2. How does a community-based, extracurricular history expedition enable teenagers to engage in the practice of history?

3. In what ways does an out-of-school history expedition lead to outcomes similar to those the NEA (1893) associated with the intensive study of learning?
4. What is the relationship between the lived experience of a community-based history expedition and Lave and Wenger's (1991) theory of peripheral participation within a community of practice?

#### Definition of Terms

- **Audience:** Within the context of this study, the audience is composed of those individuals and institutions who are consumers of products produced by the history expedition.

- **Case study:** "A case study is a method for learning about a complex instance, based on a comprehensive understanding of that instance obtained by extensive description and analysis of that instance taken as a whole and in its context" (Datta, 1990, p. 17).

- **Community-based:** Sponsored by individuals or institutions within the community and taking place out-of-school.

- **Community of practice:** According to Wenger (1998a, 1998b), a community of practice is a group of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly. As defined by Wenger (1998a), a community of practice is defined by joint enterprise, mutual engagement, and shared repertoire. The members of a community of practice have a common focus and culture that may involve shared values concerning accepted standards of quality, ethics, application of methods and tools, language, and epistemology. They interact with one another not just in the course of doing their work but to clarify that work, to define how it is done and even to change how it is done. Through this mutual engagement, members also establish their identities at work.

- **Constructivist learning:** Learning characterized by active, experiential methods that lead to assimilation of knowledge congruent with one's existing understanding (schema) or the accommodation of knowledge contradictory to one's existing understanding. The process of assimilation and accommodation allows the learner to adapt to sensory inputs and maintain equilibrium. To the extent accommodation occurs, learning occurs as well (Piaget, 1950; Bruner, 1966). Constructivist learning is often best achieved in a social setting with the aid of more knowledgeable others (Vygotsky, 1978) and within authentic contexts (Rogoff & Lave, 1984; Lave & Wenger, 1991).

- **Curriculum:** The experiences a student encounters in a learning environment made explicit by its administration (formal curriculum), the environment implicit in the enactment of the formal curriculum (hidden curriculum), and the values held by the school leadership (hidden curriculum) (English, 2000).

- **Curriculum of identity:** A curriculum whose primary focus is developing the holistic child. In high school, it would introduce the disciplines as possible futures for

each teenager and would engage teenagers in authentic disciplinary inquiry. No matter the level at which participants practice the discipline, participants learn about both the discipline and themselves as a result of the inquiry (Wenger 2004).

- **Discipline:** A field of research set apart from others by its research interests (content), ways of thinking and knowing (epistemology), and its methods of inquiry (syntax) (Schwab, 1962). Formulated with respect to the academic disciplines, many of Schwab's ideas bear resemblance to Lave & Wenger's (1991) definition of communities of practice. A major distinction between the two is that Lave & Wenger consider non-academic vocations and avocations within their definition of a community of practice (Lave & Wenger, 1991; Wenger, 1998; 2004).

- **Disciplinary structure:** The paradigms used by a discipline which determine what subject matter the discipline studies as well as its methods of inquiry (Schwab, 1962).

- **Historical knowledge:** One's understanding of both a body of content and a discipline with regard to history. As grasp of a body of content, historical knowledge includes one's command of factual assertions concerning a phenomenon, the existence and content of commentaries by others concerning the phenomenon, as well as the context in which the historical data were gathered and commentaries created. With respect to the discipline of history, historical knowledge includes command of the accepted practices, tools, and values of the community of practice of history as well as its language, organization, and structure.

- **Historical thinking:** The process of thinking to gain a historical understanding of a past event, period, or other phenomenon. With regard to history, the discipline-specific way of thinking involves disciplined inquiry as guided by the accepted standards of a community of practice of historians (Wineburg, 1991; Levstik & Pappas, 1987; Nash & Crabtree, 1996). It is widely held that the skills required for historical thinking include chronological thinking, historical comprehension, historical analysis and interpretation, historical research capabilities, and decision-making (Nash & Crabtree, 1996).

- **History expedition:** A history expedition is a constructivist activity requiring its participants perform original research in pursuit of a group goal. Although each expedition has a leader, participants are co-researchers with respect to furthering the limits of historical knowledge. It is the leader, however, who determines the research objectives of the expedition (Webb, 1955).

- **History seminary:** The history seminary is a method of training historical investigators (G.B. Adams, 1905) that introduces history as a subject of human construction and consequently open to error (Burgess, 1885). The primary object of the seminary is not to teach the facts of history but to teach the methods by which a historian deals with the original sources from which the facts are distilled (G.B. Adams, 1905).



- Intensive study of history: An idea advanced by the Madison Committee (NEA, 1893) that advocated college seniors be given the opportunity to study history intensively for one year. The study would be undertaken as a class, with no particular curriculum other than open-ended research of a historical question. The language of the Madison Committee's report implies that the intensive study in history in high school would be similar in method and spirit to the college seminary in history.

- Intrinsic case study: A case study focused on a phenomenon chosen simply because it is of intrinsic interest to the researcher, has been assigned, or through its extraordinary nature is worthy of study. The primary purpose of an intrinsic case study is a deeper understanding of the phenomenon itself. This is in contrast to an instrumental case study whose purpose is to use the case as a means of gaining insight into an issue or issues (Stake, 1995).

- Legitimate peripheral participation: A fundamental characteristic of situated learning, legitimate peripheral participation describes the process of newcomers engaging in practice on the periphery of a community of practice. (Lave & Wenger, 1991).

- Out-of-school: An activity taking place within the community, without the sponsorship of a school or school board, for which participants receive no academic credit.

- Participant: An individual or institution actively helping further the research effort of the history expedition. A participant is directly linked to the production process of the history expedition as opposed to audience members who simply consume the expedition's product. Participants can also be consumers of the expedition's product; hence, it is possible, indeed probable, that a participant can also be a member of the expedition's audience.

- Project: As defined by Kilpatrick (1918), a project is wholehearted purposeful activity in a social situation. For the purposes of this study, a project is a constructivist activity undertaken in pursuit of a goal and characterized by participant choice.

- School: For the purposes of this study, school is defined as both a physical building and a context for education. The context of "school" is defined by its formal, hierarchical organization; its adherence to a formal curriculum; the fact that it is subject to high stakes, end-of-year examinations or other means of accountability; its operation by a governmental agency responsible to the public; and its compulsory nature. School is considered the primary venue for learning within the curriculum and consists of both curricular, extracurricular, and the officially sponsored activities undertaken in and out of that structure in pursuit of the school district's formal and informal curriculum. Not all activities that take place in school, however, are school. By way of example, a field trip to a skating rink as part of the co-curriculum or extra-curriculum is still school even though it has left the physical grounds of the building operated by the school board. This is because the educational activity at the skating rink is tied to the curriculum, operated under school rules, and led by school employees. On the other hand, instructional

activities sponsored by a religious group that meets at the school at a time when the school is normally closed and rents space at a fair market value is not school; it is a community organization operating as a tenant.

- Situated learning: An approach to learning that emphasizes the importance of the contextual and social aspects of the learning environment. By emphasizing authentic context and providing learners the status of practitioners of a discipline, learners have the opportunity to engage as participants within a community of practice. (Lave & Wenger, 1991; Brown, Collins, & Duguid, 1989).

- Sources: With respect to the study of history, there are generally acknowledged to be two types of sources, primary and secondary. Primary resources provide eyewitness or contemporary accounts of a phenomenon. Primary sources can be manuscripts, oral histories, photographs, maps, artifacts, recordings, and other such materials. Secondary sources, such as textbooks, are written by those who were not their and are based on primary sources (UCLA, 1999).

### Assumptions

The following assumptions were made as a part of this study:

1. Although developed for use within schools, the implementation of the intensive study of learning (NEA, 1893) as a history expedition is not limited to a formal school environment. This is based on the observation that a history expedition is defined in terms of an activity undertaken with the objective of attaining certain goals through the exploitation of certain resources; it is not defined as a place (Webb, 1955).
2. Participants and audience respond truthfully when asked to provide their opinions, observations, and recollections.
3. None of the participants had a deep understanding of World War II, the United States Army Cavalry, or the Southwest Pacific Theater of World War II prior to their participation in the study.
4. It is pedagogically sound and beneficial for adolescents to learn history by engaging in the procedures accepted among professional historians.

### Limitations

The limitations of this study are associated with the research design. Being an intrinsic case study of a critical instance, the investigation was necessarily limited in scope to one instance. Other factors limiting the study are that the study:

1. Is idiographic in nature, seeking only to describe phenomena as they relate to a specific event in an effort to better explain that event.
2. Is limited to one location.
3. Is limited by the demographics of its participants to a generally homogenous group with respect to race, religion, and academic ability.
4. Is limited to studying situated learning in an out-of-school setting.
5. Is limited to a project employing a history expedition (Webb, 1955) model of learning.

### Summary

For the last century, students have reported that history is boring, irrelevant, and exemplified by teacher-centered instruction, memorization, and multiple-choice tests. During the same period, American high school students performed poorly on national assessments of history knowledge, particularly those involving higher order thinking. The inquiry method of learning holds promise as a way to stimulate higher order thinking in history, motivate those participating in the inquiry process, and to help explain the structure of the community of practice of history. A model exists within the field of history that acts as an inquiry-based vehicle for learning and that model is the history seminary (Adams, 1884; Adams, 1905) undertaken as a history expedition (Webb, 1955). Unfortunately, attempts to foster inquiry in history by the NEA (1893), educational progressives (Dewey, 1916, 1933, 1938; Kilpatrick, 1918), and the New Social Studies Movement (Bruner, 1965a; Fenton, 1969) have failed. Currently, however, educational theory supports history inquiry by way of constructivism (Bruner, 1959, 1960, 1961, 1968) social constructivism (Vygotsky, 1978), and situated learning (Brown, Collins, & Duguid, 1989; Lave & Wenger, 1991). Furthermore, theory supports situating the history expedition out-of-school in the community (Illich, 1970; Freire, 1970;

Martin, 1996). In order to pursue the primary research question, In what ways does a community-based, extracurricular history expedition enable teenagers to engage in the practice of history?, this researcher applied an intrinsic case study methodology (Stake, 1995) to a purpose-designed history expedition this researcher created and led.

Chapter 2 presents and discusses the literature related to pursuing the primary research question, emphasizing the areas of inquiry and problem-based learning as present in constructivist and social constructivist theory, situated learning, and historical thinking.

Chapter 3 presents and discusses the intrinsic case study methodology used to pursue the primary research question. Chapter 4 presents the findings of the study as they relate to the study's research questions. Finally, Chapter 5 discusses the findings presented in Chapter 4 and their implications for both informal and formal education.

## CHAPTER 2

### LITERATURE REVIEW

Familiarity with the seminal literature of situated learning theory and its practice provides context to this study, as does a familiarity with research on teenagers engaged as historians. By providing a review of the pertinent literature, this chapter provides a theoretical and practical context to engaging teenagers as historians in an out-of-school situated learning environment. The chapter is structured in two parts. First, the seminal literature regarding the theory of social constructivism, inquiry-based methods of instruction, and situated learning is reviewed. In the latter part of the chapter, research and anecdotal evidence regarding inquiry and situated learning in the history classroom is reviewed as well.

#### Constructivist and Social Constructivist Theory

The formal development of constructivist theory can be traced to Piaget's model of how individuals learn (Beilin, 1992). According to Piaget (1985), humans are thinkers who develop the potential to act in response to their environment. He called the cognitive structure that allowed the individual a particular response a schema after Bartlett's (1932) concept of how memory is structured. The ability of an individual to successfully develop an array of schemata allows an individual to cope in a complex environment (Hergenhahn & Olson, 2001). Piaget (1985) called an individual's ability to successfully engage with their environment on the terms of their existing schemata assimilation. As a tool, assimilation is effective at dealing with situations that are unchanging and known. However, individuals exist in a changing environment and often find an existing schema ineffective in negotiating their experience. Hence, they

experience disequilibrium. The human drive to restore equilibrium, termed equilibration by Piaget (1985), is so great that it causes the individual to take steps to restore order to their experience. To the extent an individual adjusts his/her understanding of the phenomenon as a result of their experience, the individual has learned (Biggs, 1965). Within Piaget's (1985) writings, he calls this act of learning accommodation. In short, through the process of equilibration and the application of the tools of assimilation and accommodation, individuals maintain their ability to adjust to the perpetually changing environment.

The importance of Piaget to constructivism lies in his development of theory that specifically addressed the processes associated with the cognitive development that we call learning. From his theory sprang an acceptance that (a) individuals are shaped by their experiences; (b) learning depends both on the acquisition and cognitive processing of data according to existing schemata; (c) individuals arrive in the classroom with different schemata and therefore respond to educational experiences in different ways; and (d) individuals must accommodate in order to learn. In short, learning is an active process in which individuals naturally develop unique and deeply personal responses to their environment.

Another researcher whose work has helped define the understanding of constructivism in the United States was Jerome Bruner (1960). His ideas concerning learning emphasized the need for (a) content structure, (b) preparation of the student for learning, (c) the importance of intuitive and analytical thinking, and (d) motivation. Rather than training children to memorize large amounts of material with no apparent structure, Bruner wrote that children should first learn the structure of the content. Once

they understand the structure, they can easily stick the facts onto it as necessary for learning. However, structure alone is not enough. Instead, children also need to be prepared to learn; hence, his idea of the spiral curriculum. When presented with an unknown situation, intuitive and analytical thinking allows children to make the great leap from what is known to a new understanding that explains the hitherto unknown phenomenon. Finally, children should be intrinsically motivated to learn. While any form of motivation is better than no motivation, to the extent the motivation is intrinsic, the learning will be more fulfilling for the child.

Bruner's (1960) research findings are ideal for use in applications that engage students in inquiry. His idea of the spiral curriculum ensures students are intellectually prepared for the learning experience. His emphasis on motivation is addressed by the student-centered nature of inquiry. The context of the investigation serves as a starting point for developing structure, and the constructivist nature of inquiry develops both analytical and intuitive thinking on the part of its participants. Bruner's work is particularly relevant to this study due to his advancement of "the structure of the discipline" (p. 19). The idea that each discipline has a structure involving shared beliefs and practices, with subgroups identified in some way as being different and with an organized body of knowledge, allowed later researchers to develop instructional methods that took advantage of that concept (Schwab, 1962, 1963) or to develop theory aligned with that concept (Lave & Wenger, 1991).

Along with other notable curriculum developers such as Schwab (1962), Taba (1967), and Fenton (1967), Bruner was a leader in developing a new approach to education that placed the structure of a discipline at the center of curriculum for that

field. With regard to history, the new curricular approach was part of the “New Social Studies Movement.” As with the new curricular approaches undertaken in mathematics and the sciences, the New Social Studies curriculum was a direct outcome of the perceived education gap between the Soviet Union and the United States illustrated by the launch of the Soviet space satellite Sputnik in 1957 (Haas, 1957). At the heart of the new curricula was a reliance on inquiry as a method of learning and as a way of knowing. Although particular methods of inquiry and interpretation could differ based on the ontological and epistemological beliefs of each discipline, it was generally thought that the inquiry method would best train students in the content and structure of a field (Fenton, 1969).

Bruner (1965a) helped develop an inquiry-based curriculum for the social studies entitled *Man: A Course of Study (MACOS)*. Based on his principles associated with discovery learning, the curriculum was meant to introduce students to representative problems faced by the international community and engage those students in inquiry concerning the problems. This was to result in students learning and honing higher order thinking and decision making skills (Shermis & Barth, 1978). Other New Social Studies projects progressed as well. Funded by federal dollars, at one time there were 26 ongoing curriculum development projects within the social studies that were given the status of national projects (Sanders & Tanck, 1970).

After only eight years of development and implementation, Bruner’s MACOS curriculum was in trouble. Special interest groups brought pressure to bear on several representatives in Congress and lobbied for the removal of federal funding from New Social Studies programs that advocated evolution, questioned the primacy of God in



earthly matters, and allowed children to develop their own sense of history (Shermis & Barth, 1978). The controversy started as a result of the curriculum's purported distortion of community values due to its humanistic and anti-creationist leanings (Dow, 1975). In the end, support for the implementation of MACOS was terminated (Congress of the United States, 1975) and the New Social Studies experience had a chilling effect on forays into inquiry in the social studies for a number of years (Dow, 1991). Questions raised by the MACOS controversy that are pertinent to inquiry in history are: To what extent will public school students be free to inquire in history? Where in the history curriculum is it appropriate to deal with controversial issues? Under what conditions can students construct their own understanding of historical events? These questions need not only be asked with regard to students in light of recent controversies regarding the practice of public history in our national museums. It seems appropriate to wonder if even adult Americans will be allowed the freedom to familiarize themselves with conflicting historical accounts and construct their own understanding of history as well (Bunch, 1992; Linenthal, 1995).

Piaget and Bruner were both cognitive learning theorists, as opposed to behavioral learning theorists. Their theories have much in common and differ primarily with regard to the developmental stages of learning and the exact role of schemata in learning. With regard to constructivist learning and inquiry, however, their theories regarding constructivist learning are similar. While each acknowledged the role of interpersonal and intrapersonal mediation of learning and the influence of context on learning, neither advocated that social or cultural factors were fundamental to all

learning (Bruner, 1960; Piaget, 1985). Those researchers who did formed a new branch of constructivism; they became known as social constructivists.

While Piaget developed theory that explained how individuals learn, others looked at the effects of the environment on an individual's ability to learn and the quality of that learning. In particular, the social aspects of learning were of interest to a number of researchers. The seminal research on social constructivism was performed in the Soviet Union by Vygotsky prior to his death in 1934 (Kozulin, Gindis, Ageyev, & Miller, 2003). Not translated into English until the 1960s, his works remained largely unknown until the latter-half of the 20th century. Vygotsky's fundamental thesis was that human cognition was mediated by socio-cultural aspects of the environment (Kozulin, Gindis, Ageyev, & Miller, 2003). According to Vygotsky, learning was a function of the interaction between the individual and mediators both human and symbolic. In other words, humans learn through direct interaction with others or through interaction with symbolic language, such as writing, that bear meaning within society. The concept that the individuals and symbols that mediate learning allow children to advance to a higher level of understanding than they would using their own native abilities was called the zone of proximal development (Vygotsky, 1978). With regard to developmental issues, an interesting observation has been that Vygotsky believed adolescence was an important time for learning. At the same time adolescents were becoming physiologically mature, they were also capable of formal-logical thinking. In his words, "a whole world with its past and future, nature, history, and human life opens before the adolescent" (in Karpov, 2003, p. 150).

Vygotsky's contributions to learning theory support the use of collaborative group work under the direction of a mentor. The mentor determines the zone of proximal development for each of the group members and initiates activities that allow each individual to progress to the next highest level of understanding. Since books and other symbolic tokens can be as effective a mentor as a human for some children, in depth, one-on-one mentoring may not be necessary for all children at all times. In addition, mentors can take advantage of the relative developmental maturity of adolescents in order to present the world to them in new ways. In the 1930s, at the time Vygotsky was performing his research on social learning and what the discipline would later call constructivist theory, psychologists in the United States were developing their understanding of behavioral learning theory (Hergenhahn & Olson, 2001). Vygotsky's work was relatively unknown to Americans at the time; consequently, contributions to social learning would come only decades later as the result of research undertaken in the United States in the field of anthropology and cognitive psychology. By the time Vygotsky's (1978) original work on the socio-cultural aspects of learning became known to researchers in the United States, it was chronologically concurrent with the publication of research in the field of cultural anthropology that supported his theory of social constructivism (Lave, 1977, 1982; Rogoff & Lave, 1984; Collins, Brown, & Holum, 1991; Lave & Wenger, 1991).

In the 1970s, there was a divide within anthropology concerning the characteristics of education. The discipline split the field of education dichotomously, and somewhat arbitrarily, into formal and informal institutions of education (Lave, 1977). Informal education is that education which takes place outside of school and by which

individuals learn through observation and demonstration. In informal education, learning occurs as a by-product of participation, not through classroom instruction. Formal education, on the other hand, takes place in schools and teaches abstract knowledge that is meant to be generalizable to other situations. Struck by the absence of knowledge about non-schooled, informally-educated children, Lave (1977) embarked on a project that studied the contrasting cognitive effects of informal and formal education.

In an address before the American Anthropological Association, Lave (1977) presented results of her research concerning how mathematics instruction differed between informal and formal environments in Liberia. Having determined that a fundamental ability to work with numbers is important to tailors, Lave studied apprentice tailors who varied in formal education from those with ten years of schooling to those with none (Lave, 1977). Through observation and testing Lave determined that both formal and informal methods of education allowed transfer of knowledge to other domains. However, the ability to transfer knowledge faded as the problem departed from the context in which it was learned. The closer the problem approximated tailoring, the better the informally schooled participants did. On the other hand, the closer the problem approximated classroom problems, the better the school-trained participants did. Lave hypothesized that both content and situation mattered with respect to the transfer of learning. Her second finding was that a major difference between informal and formal learning was the role of testing. In formal education, testing is a major part of the school experience. While informal learning does have tests, they are not nearly as important as practicing the trade. The reason formally schooled subjects did better on experimental tests than an informally educated participant was their familiarity with

tests. Formal education did not improve transfer; rather, it improved the ability to take tests. Transfer occurred in relation to the similarity of content and context between the problem at hand and the manner in which the knowledge was initially gained. While still focused on the social aspects of learning, Lave was opening the door to the importance of context in the transferability of knowledge.

At the same time that Lave was studying social learning through the lens of anthropology, two psychologists were studying the same phenomenon as well. Barbara Rogoff (Rogoff & Lave, 1984) studied informal learning in the cross-cultural settings of Guatemala and the United States while Albert Bandura (1977) studied the effects of observational learning among children in the United States. Rogoff was initially interested in studying the social and cultural influences on the development of memory. Her research agenda soon changed to trying to understand how cognition was integrated with socio-cultural factors in society (Rogoff & Chavajay, 1995). Through several studies embedded in the Mayan subculture of Guatemala, Rogoff came to understand the influence of experienced mentors to the process of informal learning by children in Mayan society (Rogoff, 1977; Rogoff & Lave, 1984). Later research (Rogoff, Baker-Sennett, Lacasa, & Goldsmith, 1995) determined that as individuals engage in socio-cultural activities they contribute to the community and grow as part of the experience. The work of Rogoff and Lave in the 1970s substantiated many of Vygotsky's research findings regarding social learning. The final link in the development of social learning theory came with Bandura's work in cognitive psychology.

Early in the 20th century, behavioral psychologists of the stature of Thorndike and Watson asserted that learning can only result from direct experience and not

observation (Hergenhahn & Olson, 2001). By the beginning of World War II, however, the idea that animals can learn through imitation was becoming an accepted belief (Miller & Dollard, 1941). Based on his work with children, Bandura (1965) determined that observational learning was possible and that it was different from imitative behavior. Whereas imitation implied reproduction of behaviors with great fidelity, observational learning did not imply that the observed behaviors would be imitated. As children observed, they mediated the reproduction of behaviors. That mediation signaled a cognitive influence on the choices they made as a result of observational learning. According to Bandura (1977), observational learning takes place on a daily basis and is a normal part of human life. From this, Bandura developed the concept of modeling and its importance to learning. Since observational learning is such an important part of human life and modeling is so influential to human learning, Bandura asserted that schools, the media, and the entertainment industry have great influence in Western society. Consequently, while parents may send their children to schools, schools are not the only institutional learning centers in our society (Hergenhahn & Olson, 2001). Bandura (1986) asserted that if what is meant by learning is conditioning children to respond to certain stimuli in specific ways, then behavioral learning theories are appropriate for the task. If, however, learning is acquiring knowledge through the cognitive processing of information, then learning is a socio-cognitive activity.

While the theory of social constructivism was built through the work of a number of researchers, this study has focused on the contributions of Piaget, Bruner, Vygotsky, Lave, Rogoff, and Bandura. By the 1980s, their work had developed the field to the point where the following findings were generally accepted:

1. Individuals come to the learning environment with different experiences, knowledge, and coping mechanisms.
2. Learning is deeply personal and consequently different for everyone.
3. Learning takes place when a learner's coping mechanisms are self-modified to successfully engage with a new situation.
4. The learning that is the most meaningful is the learning constructed by the learners themselves.
5. It is natural for people to require the help of others in order to learn. This help can come from a peer, a more experienced individual, or symbol-based collections such as books. In addition, the learning experience need not be direct. Learning can be achieved through modeling and observation.
6. Informal learning environments can effectively engage individuals in context-specific learning.
7. Learning in informal environments does not transfer well from the context in which it was learned to other contexts.

As Lave (1982) continued her work in social learning theory, she realized something else was important in the informal learning equation that was not emphasized enough in social learning theory. That missing ingredient was context; the ingredient that took into account the specific situation associated with the learning. In other words, the situated nature of learning had yet to be addressed in social learning theory.

### Situated Learning Theory

Lave co-authored a study (Lave, de la Rocha, Faust, Murtagh, & Migalski, 1982) that focused on the relationship between arithmetic as taught in school and its application in everyday situations and problems. Her results concluded that individuals who performed poorly on paper and pencil tests often used the same skill sets to masterfully negotiate their daily routines. Trying to explain such non-intuitive results, Lave theorized that these results came about because school tests do not reflect real

life--a life in which situations are dynamic, problems and solutions are generated individually, and a life within which context, content, and learner influence and modify the relationship between each other. Instead, arithmetic as taught in school was immutable in form and tested with problems designed to honor that immutable form.

In a separate report, Lave (1982) summarized her earlier work and compared it to ongoing efforts in the field of psychology to examine context-specific demands for cognitive skills. The psychologists similarly brought into question the impact of cognitive skills learned in a school setting on the ability to use those same skills in other settings. Lave highlighted the fact that, in schools and experiments, the problems are not designed by those taking the test. In addition, test designers expect students to solve the problem with a specific arithmetic tool as taught by the teacher. This conflicts with everyday practice in which an individual determines his/her own problem, selects his/her own tools, and uses them as s/he sees fit to solve the problem. Lave commonly encountered students who do not perform well in school arithmetic and saw themselves as poor mathematicians, this in spite of their ability to successfully use arithmetic outside of the classroom to solve everyday problems.

Lave postulated that the primary difference between problem solving in school arithmetic and everyday life was that school problems are one-dimensional while everyday problems are multi-dimensional. Arithmetic problems in school test the individual's knowledge of how to apply a specific arithmetic procedure or concept while minimizing or removing all other issues from the context. Everyday problem solving involves complex contexts and an interactive relationship between the actor, the setting, and the problem at hand. In the context of solving school arithmetic problems,



calculation is the primary tool, while within the context of solving everyday problems, actual calculations play a minimal role compared to other cognitive processes (Rogoff & Lave, 1984).

Influenced by Ortner's (1984) view that ritual, not socialization is the most powerful factor in maintaining social order, Lave (1988) proposed that with such a view daily routine is a more powerful source of socialization than is intentional pedagogy. Cognition is not knowledge within a person, distinct and separate from the experienced world. Instead, cognition is a socially shared activity that implies a give and take between actor, setting, and arena in real time. The rational model of problem solving, with its linear approach and goal setting process, does not reflect everyday routines. Everyday problem solving is not linear, and it works with expectations, not goals. Those expectations are socially derived and modified in real time as the situation changes. People in everyday life face dilemmas more than they do the simple problems presented in classrooms. Based on her efforts to make sense of her research results, Lave gave up on her efforts to characterize the differences between formal and informal learning and decided to focus simply on socially situated learning.

Lave's influence on the field of education was felt with the publication of an article on situated cognition and the culture of learning by Brown, Collins and Duguid (1989). In this article, the authors developed the concept of learning through cognitive apprenticeship. They claimed that knowledge is situated and is a result of the interaction between culture, context, and activity. Contrary to the assumptions of formal education that knowledge is individually self-structured, that schools are neutral environments for learning, and that concepts are abstract, immutable, and unaffected by the activities by

which they are learned, the authors developed a method to introduce students into a community of practice through cognitive apprenticeship. The term apprenticeship implies that: (a) authentic activity is at its center, (b) a master-apprentice approach is used, (c) approaches to problem solving depend on the context, and (d) a community of practice exists.

Lave and Wenger (1991) advanced the theory of situated learning by explicating the concept of legitimate peripheral participation within a community of practice. Within this model, learners participate within a community of practitioners. Mastery of knowledge and skills inevitably requires one to journey from a peripheral to a central position within the community. The definition of learning within this theory is the process by which individuals enter the community and progress along trajectories of development within that community. Its situation within society implies that old-timers, newcomers, and members of varying expertise and length of membership form the community, as do the community's values, artifacts, and activities. Learning through legitimate peripheral participation is seen as the same conceptual model by the authors as apprenticeship; however, the different name removes the social stigma sometimes associated with apprenticeship and its history of exploitation (Grosshans, 1989).

Lave and Wenger (1991) depart from the work of Brown, Collins, and Duguid (1989) in their thoughts about how far to generalize their concept. While Brown, Collins and Duguid were content to leave apprenticeship in its most understood form of master-apprentice and the community of practice as a particular domain or discipline, Lave and Wenger broadened the generality to society. Learning was seen as a natural part of life within the lived-in world, and from this perspective, Lave and Wenger proposed

legitimate peripheral participation as learning within a social practice. From the perspective of education, the authors believed it was necessary to declare that legitimate peripheral participation is only a model, not a method, or a teaching strategy. As a model, they hoped it would allow the analysis of education methods with respect to how people learn as a natural part of life.

Lave (1977) states that in the situated model of learning, there is no objective knowledge; therefore, there can be no true teachers of objective knowledge. If society mediates all knowledge and if facts are a part of knowledge, then different communities of practice operating as different parts of society might see the same facts in a different light. The only way education can occur is through the mediation of facts through the lens of a particular community. The implications for education from the situated learning model are that: (a) It is not only possible, it is probable, that multiple conflicting views exist with reference to the same objective data; (b) teachers no longer are the sources of truth; instead, they are facilitators of learning about different communities and their views about a subject; (c) education becomes enculturation to multiple perspectives at work in our society; and (d) assessment no longer can be based on “right,” or “wrong” answers.

Building on the work of Lave (1977, 1982, 1988), Collins, Brown, & Holum (1991) developed their concept of cognitive apprenticeship further. They observed that in formal education much of the learning occurs by rote, with little explanation between the teacher and the student. They said that the processes of thinking are often invisible in our schools, yet, in an apprenticeship environment, the processes of thinking and meaning are explicit. By combining Lave’s theory of situated learning and her concept of

legitimate peripheral participation along with Vygotsky's ideas of the zone of proximal development and scaffolding, Collins, Brown, & Holum developed an easily understood concept of cognitive apprenticeship. Within their model, the facilitator enabled the learner to traverse a landscape of negotiated, complex, meanings. Their model included a process of modeling, scaffolding, coaching, collaborating, and fading. This model would become a popular model due to its inherent clarity, its basis in the work of earlier educators, and its applicability to a classroom situation.

Whether Lave & Wenger (1991) wanted situated learning to be a method of teaching or not, it became a recognized method of learning with the publication by Stein (1998) of a digest devoted to its use in adult education. Within this document, Stein describes situated learning as an instructional strategy consisting of four major ideas:

1. Learning is grounded in the everyday environment.
2. Knowledge is gained in context and only transfers within similar contexts.
3. Learning is a product of the community's values in addition to "declarative and procedural knowledge" (p.1).
4. Learning is student centered. (p.1).

To summarize, situated learning puts the students at the center of a process involving content, context, a community of practice and participation.

While the theoretical aspects of situated learning theory are mentioned in a wide variety of reports, reports of its application to classroom learning are less frequent. Some of its most frequent applications deal with technology in the classroom. Having contributed to the development of anchored instruction (Cognition & Technology Group at Vanderbilt, 1990), situated learning became a fundamental theoretical touchstone for that effort which sought to provide problem-based contexts for constructivist learning

through video technology. Anchored instruction became known in the world of elementary education through the Jasper Woodbury series of videos used in elementary reading, language arts, and mathematics instruction (Theory into Practice Database, 2001). Since that time, it has contributed to research involved with the design of learning environments enabled through technology integration in the classroom (Young, 1993, 1995; Herrington & Oliver, 1999; Stillman, Alison, Croker, & Tonkin, 1998; Rasmussen & Northrup, 1999; Hsu, Liao, & Chen, 2001; Lee, 2002). Removing technology-based applications of situated learning theory, there are but a few reports associated with the use of situated learning environments in secondary education (Bonk, Hay, & Fischler, 1996; Ritchie & Rogano, 1996; Welzel, 1998; Kirk, Brooker, & Braiuka, 2000; Tinker & Krajcik, 2001; Hogan, 2002; Andersen, 2004; Pitri, 2004). There are no reports in the literature of non-technical learning environments designed according to the theory of situated learning which engage teenagers as practitioners in a community of practice.

In spite of Stein's (1998) assertion that situated learning is a method of instruction, Lave and Wenger (1991) contend it is only a lens for viewing learning environment and process. One cannot use situated learning as a specific technique; one, instead, uses situated learning theory to ground the instructional environment within which specific methods are applied. The match of method to situated learning theory is largely dependent on the activities of the community of practice within which the learning takes place. In a situated learning environment in the performing arts or sports, a performance model of instruction would be appropriate. In the language arts,

writing for understanding might be used; in the sciences and history, a logical method for use in a situated learning environment is inquiry.

### Inquiry Learning in Education

As a formal learning technique, inquiry can be traced back over two millennia to Aristotle and his inquiry-based method of learning that employed sensory perception and empirical research (Hergenhahn & Olson, 2001). There is evidence to suggest that it was alive in Renaissance Europe as part of architectural training of the period (Knoll, 1997), and it has been asserted that Rousseau advocated the spirit of inquiry during the Enlightenment (McGough, 1992) as did Dewey during the Progressive Movement (Knoll, 1997). Inquiry as a specific method of structured learning became known by that name in the 1960s with the advent of Schwab's (1963) biology curriculum. Even today, inquiry remains a vital force as it remains vibrant in the face of new developments. The introduction of computers and the Internet to classrooms has allowed new forms of inquiry such as WebQuests to take their place in schools (Dodge, 1995; Joseph, 2000; Milson & Downey, 2001) just as new foundational theories of learning have allowed the inquiry to be interpreted in new ways (Lave & Wenger, 1991; Barab & Landa, 1997; Barab & Duffy, 2000; Barab & Hay, 2001; Barab & Plucker, 2002; Wenger, 2004). While exhibiting tremendous flexibility with regard to its application, that very characteristic makes inquiry difficult to define. The futility of trying to come to an accepted definition of inquiry seems to have much in common with society's inability to define obscenity. The comments of Justice Potter Stewart ring as true with regard to inquiry as they did with obscenity: "I shall not today attempt further to define the kinds of material I understand to be embraced within that shorthand description; and perhaps I could never succeed in

intelligibly doing so. But I know it when I see it..." (Jabobellus vs Ohio, 1964, p. 197).  
And so it is with inquiry learning.

The positive outcomes promised as a byproduct of inquiry learning are as legion as its purported fathers. Inquiry learning has been advocated for its ability to provide opportunities for higher-order thinking (Bruner, 1968), for its ability to provide relevance and a framework to otherwise inert data (Kellum, 1969), as a way to make sense out of the novel and unknown (Suchman & Carlson, 1968), and as a way to improve the skills of citizenship within a democracy (Postman & Weingartner, 1969). In addition, and of great value to this study, inquiry learning has also been positioned as way to learn about a particular discipline and its structure (Schwab, 1962), as well as a way to provide opportunities for the development of an individual's identity (Wenger, 2004).

The idea that the thinking required for inquiry is different from that required for traditional, didactic classroom methods was advanced by Bruner (1965b). He asserted that inquiry learning increases intellectual potency, shifts the motivation to learn from extrinsic to intrinsic rewards, develops capabilities within the inquirer with regard to discovering, and serves as an aid to memory processing. Inquiry as a life skill and an example of reflective thinking takes a primary position in Kellum's (1969) support for inquiry as a powerful tool in learning. Similar to Whitehead's (1929) assertion that unused, irrelevant information is inert, Kellum argues that information is bereft of intrinsic value until employed in thinking. Since inquiry is part of an intellectual process that makes "use of information in developing understanding" (p. 104), Kellum (1969) postulates that information learned and understanding(s) gained as part of inquiry present themselves as relevant and useful to the inquirer. Therefore, they will be more

permanent than memorizing unrelated information. A fourth view of inquiry learning is that it has as its purpose the gathering of sufficient information to create meaning out of the observed, particularly that which is novel, or heretofore unexamined (Suchman & Carlson, 1968). From the perspective of citizenship, Postman and Weingartner (1969) chose to illustrate their position with a quote from Ernest Hemingway. They advocate inquiry learning as a way to develop in citizens “a built-in, shockproof crap detector” (p. 15). In a democracy submerged in information and subjected to the power of mass media, Postman and Weingartner position inquiry as a powerful tool on the side of the consumer-citizen. As disparate as the foregoing descriptions of inquiry’s byproducts are, they all converge on the need for the inquirer to engage in higher-order thinking. Beyond higher-order thinking, it has also been theorized that inquiry can serve to orient the inquirer to an understanding of the structure of a discipline (Schwab, 1962; Wenger, 2004) and to the social nature of knowledge (Lave & Wenger, 1991; Wenger, 1998).

### Inquiry Methods

The literature describes three learning methods that employ inquiry as a fundamental part of the learning process: (a) project-based learning, (b) problem-based learning, and (c) inquiry. Project-based learning developed early in the 20th century and stemmed from the work of John Dewey (1990), William Heard Kilpatrick (1918), and Franklin Bobbitt (1918). They applied project-based methods in order to engage students in child-centered, meaningful instruction that developed the whole child. This was achieved by giving students authentic tasks to complete; tasks that closely paralleled those commonly found in society (Kilpatrick, 1918; Bobbitt, 1918). By focusing on authentic projects as opposed to schoolhouse exercises, it was hoped



students would find their learning more relevant, interesting, and fulfilling (Dewey, 1990). Dewey's (1933) assertion that cognition was the tool that allowed humans to bridge the gap between the known and the unknown predated Piaget's (1985) similar concepts by decades. It was, however, Dewey's commitment to inquiry, often termed reflective thinking or observation (Dewey, 1933), that drove the development of project-based learning. By observing that reflective thinking consisted of: "[a]ctive, persistent, and careful consideration of any belief or supposed form of knowledge in light of the grounds that support it and the further conclusions to which it tends" (p. 9), and that, "[t]hinking is inquiry, turning over, probing or delving into...or to see what is already known in a different light" (p. 265), Dewey (1933) set the stage for Kilpatrick's (1918) project method. Building on Dewey's ideas of reflective thinking, Kilpatrick developed the idea of wholehearted purposeful activity as his description of project method. Using today's terminology, a project encompasses activities which are anchored in a problem, or a purpose, and situated in as authentic an environment as age, location, and purpose can provide. According to Kilpatrick:

[W]holehearted purposeful activity in a social situation as the typical unit of school procedure is the best guarantee of the utilization of the child's native capacities now too frequently wasted. Under proper guidance purpose means efficiency, not only in reaching the projected end of the activity immediately at hand, but even more in securing from the activity the learning which it potentially contains. Learning of all kinds and in its all desirable ramifications best proceeds in proportion as wholeheartedness of purpose is present. (pp. 333-334)

A fundamental difference between Dewey's and Kilpatrick's ideas is evident in Kilpatrick's definition of project-based learning. While Dewey (1933) had been more descriptive of what constituted the beginning of reflective thinking, linking it explicitly to a beginning point of uncertainty and a method of resolution of inquiry, Kilpatrick (1918) was less emphatic regarding that direction. In Kilpatrick's description of project learning,

all that mattered was that the act have a purpose and that the learner engage in the act wholeheartedly. In that respect, Kilpatrick's idea of project learning closely resembled that found in vocational schools in the early 1900s. There, the project was used as a way to teach agrarian techniques in an out-of-school setting and implied an activity encompassing many tasks that led to successful completion of its objectives (Roark, 1925). In its use as a problem-based method of learning, project learning was advocated by Stevenson (1921). He described a project as being problem-based and undertaken in an authentic setting. The four major traits of Stevenson's (1921) project method were:

1. It must invoke reasoning rather than memory of information.
2. It must result in conduct rather than in furnishing information for its own sake.
3. The activity must be carried to completion in its natural setting rather than an artificial setting.
4. The problem must precede the principle. (Stevenson, 1921)

Hence, while Kilpatrick's (1918) concept of project learning proved very popular, it strayed from Dewey's (1933) concept of activities anchored in problems which elicit reflective thought. Instead, Stevenson's (1921) concept of project method is the one closest to Dewey's (1933) concept of inquiry learning.

Problem-based learning was introduced as a specific method in 1969, and it closely resembles the concept of inquiry forwarded by Dewey (1933) and Stevenson (1927). Developed at McMaster University in support of their medical school, problem-based learning replaced didactic methods of instruction and placed learning within a clinical setting. Developed by H.S. Barrows (Barrows & Mitchell, 1975; Barrows & Tamblyn, 1976), the concept of problem-based learning was inspired by his realization

that standard, lecture-based instructional methods were not yielding medical students capable of reasoning their way through problems in a clinical setting. By focusing on problem-based methods, Barrows sought to impress on students the ill-formed nature of real world problems, the necessity to reason one's way through choices of action, and the social nature of problem solving. Grounded in the work of prior educational theorists (Ausubel, Novak and Hanesian, 1978; Bruner, 1959; Bruner, 1961; Dewey, 1933; Dewey, 1944; Piaget, 1954), Barrows' implementation of problem-based learning fit directly into the constructivist paradigm (Dochy, Segers, Van den Bossche, & Gijbels, 2003). Six traits are characteristic of Barrow's problem-based learning. They are:

1. Learning needs to be student-centered.
2. Learning has to occur in small student groups under the guidance of a tutor.
3. The tutor is a facilitator or guide.
4. Authentic problems are presented before any preparation or study has occurred.
5. Problems serve as a tool to investigate and organize knowledge and to develop the necessary problem-solving skills.
6. New information needs to be acquired through self-directed learning (Dochy et al., 2003).

Although the above enumeration of essentials for problem-based learning is applicable across a range of disciplines, Dochy et al. (2003) observe that Barrows' concept of problem-based learning has primarily found its application in the field of health and medicine. Since Dochy et al. (2003) published their work, Barrows (2006) has added a further essential to the list, one that makes it align closely with situated learning within a community of practice. That essential is: "The sequence of activities carried out in problem-based learning, and problems employed in problem-based learning, must

accurately reflect medical practice” (Barrows, 2006, paragraph 10). In further explaining the additional essential, Barrows (2006) writes:

In problem-based learning students must go through the same activities, as they learn, that they will go through in their professional work with patient problems. The problems used must be those that are prevalent and important in practice. This ensures that the activities undertaken by the students and the skills and knowledge acquired are relevant to effective practice as a physician (paragraph 10).

With that addition, Barrows clearly identifies his concept of problem-based learning as being centered on a community of practice and that the function of problem-based learning is to engage participants as practicing members of that community. From that perspective, Barrows’ concept had much in common with Schwab’s (1963) concept of inquiry as being the gateway to holistic learning about a discipline.

Schwab (1963) introduced inquiry as both a curriculum and a method in the Biological Sciences Curriculum Study (BSCS). To Schwab, inquiry learning was grounded in the structure of the discipline and was a way to introduce students to scientific habits of mind, the discipline as a culture, and content knowledge. Through chapters in the BSCS called “invitations to enquiry,” Schwab (1963) developed a science curriculum that engaged students in authentic research practices as they addressed problems that were discipline-specific. To Schwab, the key element of inquiry was to unveil for the student the structure of the discipline as conceptualized by Bruner (1960). In learning the structure of the discipline, students focus on processes, techniques, and tools by which they can inquire toward conceptual understandings (Robinson, 1969). That in the process students learn contextually important content is a welcome byproduct of the process.

Project- and problem-based learning, as well as inquiry, are each represented in curricula today. Each seeks to: (a) place the student at the center of the learning, (b) place a higher priority on cognitive process than amassing factual content, and (c) emphasize the use of authentic environments and problems to the extent they are developmentally appropriate. Although focused on process, each of the inquiry methods requires students to manipulate content area data in the completion of their tasks. They are fundamentally constructivist in nature, and each subscribes to the social nature of learning. Each differs from the other in their objectives, the formality of the approach used during the process, and their applicability to general versus discipline-based learning opportunities.

Within the field of history instruction, students inquiring in the style of legitimate peripheral participation within a community of practice are rare. More common is an approach that injects a Schwab-like inquiry experience into a traditional didactic curriculum. While this researcher was unable to recover any reports concerning teenagers intensively studying history in the manner advocated by the National Education Association (1893), Wenger (2004), or Schwab (1962), there is an emerging strand in the literature associated with teenagers engaged in historical thinking and historian-like activities. While not full-blown inquiry, they are studies of how students engage with history in several ways. Before those studies are reviewed, however, it will be instructive to review a paper by Seixas (1993) regarding the case of history as a basis for implementation of a community of inquiry in pursuit of knowledge and learning.

Seixas (1993) wrote about the relationship of the history teacher to two separate communities of practice: education and history. Each involves research and inquiry and

according to Seixas, the role of the teacher is to mediate the relationship between the two within the classroom. As a result, the teacher stands astride two galloping horses-- one the community of professional historians and the other the teacher's students. The role of each is circumscribed by their training, experience, and roles. With their doctoral degrees, wide contextual knowledge, and status within the community of practice, professional historians are the primary inquirers in history. While nothing prevents teachers from inquiring as historians, training, institutional barriers, and resource constraints provide obstacles to such activities. Consequently, the role of the teacher is that of pedagogical specialist or the master of historical presentation to students. Unfortunately, to the extent history teachers are unfamiliar with the community of history, they will be incapable of understanding how to present it. The dilemma being that it is hard to learn about the community of history if institutional barriers and resource constraints prevent one from practicing as a historian. According to Seixas, the role of students in historical inquiry is to construct historical knowledge through the inquiry process. Here, once again, teachers hold an important position. To the extent teachers understand the community of history, they can act to mediate student learning and intervene where necessary in their role as mentors. Conversely, teachers ignorant of the community are incapable of providing help their students need as they negotiate their inquiry-based learning. Seixas summarizes by advocating the development of communities of inquiry within history that allow teachers and professional historians to freely engage each other and learn from each other's strengths.

#### Students Thinking Historically

When Schwab advocated inquiry, the thrust of the activity was on uncovering the

structure of a discipline, not the accumulation of knowledge. The structure of a discipline includes its tools, jargon, values, history, and content knowledge. Both Schwab (1963) and Wenger (2004) advocated inquiry as a curriculum in which all curricular considerations would be subordinate to authentic practice by the student participating as a member of a community of practice. In the case of Schwab (1963), an entire biology curriculum was developed based on inquiry that illuminated the structure of the discipline. Wenger (2004) developed the idea of a curriculum of identity based on participation within a community of practice. In the opinion of this researcher, history is a fertile discipline with regard to the application of Schwab's (1962) inquiry concepts or Wenger's (2004) curriculum of identity. The basic form of discovery in the discipline of history is inquiry; the discipline is well structured, operates in accordance with shared beliefs and values stemming from an epistemology developed over centuries, and maintains all the features of a community of practice. As such, it lends itself both to inquiry methods of instruction and a curriculum of identity. Unfortunately, the literature is bare with regard to the implementation of such a history curriculum in the style of Schwab (1962) or Wenger (2004). Instead, what appears are reports concerning how students think historically (Wineburg, 1991, 2001, 2004; Wineburg & Wilson, 1991; Seixas, 1993; Stearns, Seixas, & Wineburg, 2000), students involved in school projects using primary source materials (Lewy, Wolff, & Shavit, 1974; Yoder, 1976; Wood, 1994; Kobrin, 1995; Whitman, 2000; Crothers, 2002), and reports concerning students' abilities to develop historical empathy (Foster & Yeager, 1998; Pate, 1999, Kohlmeier, 2003; Klages, 1999).

The literature regarding classroom use of primary source materials can be split

into anecdotal reports and research. Anecdotal reports (Lewy, Wolff, & Shavit, 1974; Yoder, 1976; Wood, 1994; Kobrin, 1995; Whitman, 2000; Crothers, 2002) generally agree that students respond well to the use of primary source materials in the classroom. Students report they prefer classes in which they use primary source materials to those in which they do not (Lewy et al., 1974; Yoder, 1976; Schweninger, 1998; Crothers, 2002; Kobrin, 1995). Oral history has proven a particularly fulfilling way to learn for those students who have engaged in that form of inquiry (Wood, 1994; Whitman, 2000).

Possibly the most famous use of oral history methods in the classroom was undertaken not by a history teacher, but by an English teacher. In an attempt to bring English alive for his class in rural Georgia, Wigginton (1986) developed a program of inquiry associated with the folklore and history of the local area. Using oral history techniques and other inquiry methods of history, Wigginton and his students captured the soul of a dying generation and way of life. His Foxfire program spawned many similar initiatives across the country and led adults to understand that teenagers can engage in inquiry that is profitable to the community. In every case this researcher has discovered, the use of oral history has literally brought history to life for the students (Shorr, 1985; Blount, 1992; Wood, 1994; Olmedo, 1996; Whitman, 2000; Harris, 2002). For those students who concluded their inquiry with reports that were presented publicly, there was also the honor of being allowed to engage with the public as a historian (Shorr, 1985; Wood, 1994; Wigginton, 1989; Whitman, 2000). There are clear indications that when adolescents are allowed to engage in inquiry as members of a community of practice (as opposed to students) and publicly present their work, they



feel a sense of pride and accomplishment (Wigginton, 1989; Wood, 1994; Lewis, 1997; Whitman, 2000).

Separate from the literature describing inquiry-based projects that engage students in the use of primary sources is the strand of literature associated with how students and teachers make sense of primary source documents (Wineburg, 1991, 2001, 2004; Wineburg & Wilson, 1991; Seixas, 1993; Stearns, Seixas, & Wineburg, 2000; Drake, 2002; Drake & Brown, 2003). According to Wineburg and Wilson (1991), historians, teachers, and students each make sense of primary sources in different ways. Similar to Seixas (1993), Wineburg & Wilson (1991) base their description of meaning making by historians, teachers, and students according to their role in society, training and education, as well as their experience. Historians develop new knowledge within the discipline while history teachers “create new understanding in the minds of learners” (Wineburg & Wilson, 1991, p. 335). For example, Wineburg & Wilson (1991) describe the different ways each views primary source documents. Historians look at primary sources and evaluate them according to their qualities as a piece of evidence. History teachers look at the same documents and judge their value based on the document’s ability to resonate with students and connect with the curriculum. When discussing history teaching they believe is good, Wineburg & Wilson say, “In neither class did teachers send students to ferret out documents from an archive, or teach them to engage in ‘external criticism’...two activities essential to the working historian. Indeed, the documents students confronted had already been carefully selected, excerpted, and in some cases, edited by their teachers” (pp. 335-336). To the extent teachers modify primary sources from the conditions in which they would be used by

historians, the authenticity of environment demanded by situated learning (Lave & Wenger, 2001) is diminished. As a result, the Wineburg & Wilson (1991) report is indicative of research that seeks to engage students in historical thinking, yet changes the context from that encountered by historians.

Contrary to the position taken by Wineburg & Wilson (1991) in which students and teachers are marginalized with regard to their ability to engage as historians, inquiry as expounded by Schwab (1962) and Wenger (2004) explicitly engages practitioners in “doing” a discipline. By “doing” a discipline, this researcher means that inquirers engage in authentic activities associated with the research process and commonly understood practices developed by that discipline. Those practices reflect the unique epistemological and ontological values developed by the community of practice as it has evolved (Lave & Wenger, 1991). Consequently, inquiry in the style of Schwab (1962), or Wenger (2004), is much more than the vicarious learning experienced through didactic instruction. Inquiry, instead, becomes an expedition into being that holds the potential for original outcomes and recognition of one as a member of a community of practice (Wenger, 1998a). According to Wenger (2004), it is not sufficient to undertake activities that are only similar to those of historians and which take place within an artificial environment designed to increase student success on examinations. Instead, students need to engage in inquiry as historians, operate within an authentic environment, and perform tasks meaningful both to the community of practice and themselves.

Finally, primary source materials are at the heart of a group of studies associated with the phenomenon of historical empathy. Historical empathy has had a number of working definitions (Portal, 1987; Shemilt, 1987; Knight, 1989; Downey, 1995; Yeager

and Foster, 1996). However, it has operationally defined by Foster (1999) as having six characteristics. According to Foster (1999), historical empathy is:

1. A process that leads to an understanding of why people acted a certain way in the past.
2. An appreciation of historical context and sequencing.
3. Reliance upon thorough analysis and evaluation of the historical evidence.
4. An appreciation for the consequences of past actions.
5. An intuitive sense of a bygone era and how it differs from today.
6. A respect for, an appreciation of, and a sensitivity to the complexity of human action and achievement. (p. 19).

How elementary school children think in historical terms and their ability to engage in historical empathy was examined by Pate (1999). The study examined how 5th grade students use primary source materials, the students' development of historical empathy, and the students' abilities to display historical empathy. The primary sources used in the study were drawn from the United States Civil War period and consisted of five letters that were written by four different soldiers during that conflict. While the students were fascinated by the materials and very much enjoyed role-playing and imagining themselves in the past, they fell short of displaying historical empathy. They could not seem to project themselves into the past in order to fully appreciate the individuals they were studying. As Pate pointed out, the students were able to show a beginning level of historical empathy but not a full display of empathy. Lack of life experience, lack of understanding historical empathy, and a lack of scaffolding by their teacher did not allow them to progress to higher levels of historical empathy, according to Pate.

In analyzing the research data, Pate (1999) postulated that the students' use of primary sources was basic and simplistic. They had never used primary sources before

and were accustomed to simply learning from their textbooks. As a result, they depended on the textbook as their authoritative source as opposed to the letters from the participants in the war. In this case, the students trusted their secondary source (textbook) more than they did the primary sources (letters). Based on the study's results, the researcher recommended that primary source materials be introduced into social studies classrooms at the elementary level and that elementary students be allowed to learn about and become skilled in historical empathy. Pate determined that the ability of a student to more fully participate in historical empathy was closely aligned with the student's familiarity and understanding of the primary source materials. Since the students had little experience with primary sources, future studies would need to include interventions that would allow students to learn about primary sources and the critical analysis of sources. Finally, Pate determined that historical empathy is largely unattainable if the students have a poor foundation in factual knowledge.

Of particular interest in Pate's (1999) study is the idea that the ability to display historical empathy is developmental. First, the students must have a firm grasp of the facts associated with the period. Next, the students must be familiar with the distinction between primary and secondary sources and how to critically evaluate their sources. Finally, the students need to understand the concept of historical empathy and practice it in order to obtain the full fruits of the process as a learning tool. Unfortunately, the research is lacking in providing an understanding of how students make sense of the materials from their own perspective. While an unfortunate circumstance, it is understandable since Pate's study was not focused on the outcome of how 5th grade students make sense of primary source materials. Instead, Pate's research question

dealt with how well those same students acted within the historical empathy framework.

We move closer to the use of primary sources and the development of historical empathy in high schools with the work of Kohlmeier (2003). The subject of Kohlmeier's research was how 9th grade students think historically in world history when aided by a three-step instructional model. The model was based on the concepts of historical knowledge, historical significance, and historical empathy. The model was used within an activity that required students to use primary source documents and then respond in three different forums. The three forums were a reading web, a Socratic seminar, and a historical essay. In addition, the participants kept a meta-cognition journal, and interviews were conducted at the end of the research effort. Results showed that the students were able to display historical empathy and that the three-step process helped the students negotiate their way through the process of working with primary source materials.

Kohlmeier's (2003) research is interesting in that it determined 9th grade students could exhibit historical empathy and that they gained more from the primary source materials they used than did the 5th grade students in Pate's (1999) study. One of the reasons why Kohlmeier was more successful may have been due to the relative maturity and life experience of the 9th grade students as opposed to the 5th grade students. Another possibility may have been the three-step instructional approach used in Kohlmeier's effort. Described as a model that allows students to further develop their skills in analyzing primary sources with each subsequent step in the model, this approach may allow students to develop their historical thinking in a more structured fashion than pure constructivist inquiry would allow. The drawback to the research is

that, once again, it provides little information concerning how high school students make sense of the source documents with which they are working.

The closest any researcher has come to trying to understand how high school students make sense of primary source materials was in the work of Klages (1999). The researcher examined how secondary social studies students (n=21) engaged with historical thinking and historical empathy as they used oral history interviews. Contrary to most other studies that focus the use of primary source documents within the discipline of history, Klages examined how primary source documents affected students' historical thinking within an economics class. Focusing on the Depression-era experience of Americans, the author employed the use of oral histories of Depression-era Americans to allow the students to more clearly understand the impact of that economic period on American life.

Notable among the approaches Klages (1999) used was the inclusion within the realm of selected documents primary sources and artifacts that were inherently less intimidating than most primary sources used in classrooms. Specifically, photos and oral histories were used in addition to diaries and other documentation. By introducing the students to oral history as an activity, Klages was able to immerse the students in a history project that brought the students face-to-face with actors on history's stage--the senior citizen's they interviewed. The personal connection between the students and the people they interviewed allowed the students to more closely empathize with people from the period they were studying. As the students worked to build a narrative understanding of Depression-era America, they mastered the facts of the period, built their narrative understanding, and developed their ability to think critically about history.

The project involved 21 participants of which 12 were male and nine female. The researcher followed a qualitative approach of data gathering, using student interviews, written responses to oral histories, group discussions, responses to open-ended questions, essays, individual student-created interview guides, and class presentations as sources of data.

Klages (1999) appears to have had the best results with regard to school students exhibiting historical empathy. Klages also had the oldest participants in her study as compared to Pate (1999) or Kohlmeier (2003). The participants were seniors in high school, and many of them were already employed in part-time jobs within the community. In addition, Klages's use of the history project as a vehicle for the research effort presented the students with an active, meaningful experience. Knowing that they would have to conduct their own oral history interviews provided students with an incentive for learning both content and process prior to the event. The oral history interview itself brought a deep personal meaning to the work students were accomplishing within the project and made the learning within the project more relevant to the students involved. Unfortunately, the focus of the study was not how the students wrestled with and made sense of the materials with which they were dealing. That very personal process of making meaning of the unfamiliar can be intuitively constructed from many of the exhibits provided in Klages's work; however, it was not a primary objective of the research effort.

### Conclusion

The literature provides both theory and method for undertaking extended investigations in history. The inquiry method conforms to constructivist philosophy and

when undertaken collaboratively by a group it conforms to social constructivist philosophy. When structured as an extended project, it allows holistic learning as a number of process-driven problems are resolved by the project team. Over time, the project team learns that extended inquiry is a process that allows multiple entry points, multiple avenues of research, and multiple opportunities for pursuing personal interests within the framework of the research question. When the project is undertaken in a situated environment, it provides participants the opportunity to learn about the content area, the structure of the discipline, and themselves, in an environment focused on authentic performance. Learning anchored in accomplishment of a task that requires multiple problems to be solved helps focus activities and increases the relevance of activities undertaken in support of the project. Within the context of historical research, certain steps can be taken by a researcher to increase the probability that students will think historically. The literature supports the idea that the more mature the student, the more likely s/he will have the life experience to display historical empathy. Active learning and immersion in a meaningful project seem to bolster the probability that students will find their work more relevant and by extension more interesting. The ability of students to experience first-hand the unfamiliar is important as well. To the extent museums, interviews, photos, pictures, movies, reenactments, and audio artifacts make the past more accessible, students connect to other times in a more empathetic manner. Of the various forms of primary sources experienced by adolescents, oral history consistently engages them in ways unrealized by other primary source forms.



## CHAPTER 3

### RESEARCH DESIGN

#### Introduction

This chapter describes the research design used in this study and is organized as follows: (a) purpose and statement of the problem, (b) research questions that guided the study, (c) the research design, (d) researcher identity, (e) case selection and description of the setting, (f) characteristics of the participants, (g) data sources and the procedures used to collect data, and (h) the method of data analysis.

#### Purpose and Statement of the Problem

Evidence suggests that the traditional history curriculum of America's high schools is unsuccessful in meeting the personal needs of the students, as well as the goals of history education as perceived by various segments of American society. A possible alternative to the traditional model, the intensive study of history (NEA, 1893), has remained unstudied for over a century. The intensive study of history model holds the promise of engaging teenagers as practitioners within the discipline of history and providing them the opportunity to (a) critically employ historical sources, (b) relate their narrow investigation to other parts of the discipline, and (c) develop the ability to use history for the benefit of the community and themselves. In spite of an extensive review of the literature, there are no reports of the model being implemented in the high schools of the United States. As a consequence, the concept of the intensive study of history has remained critically unexamined in spite of increased efforts to explore alternative methods of history instruction. The focus of this study is to report on the implementation, operation, and results of a one-year curriculum implemented to explore

the concept of the intensive study of history. This intrinsic case study documents the implementation, operations, and effects of History Without Borders (HWB), an experimental program of community-based history learning for teenagers. Implemented as a project-based, voluntary, out-of-school approach to history learning, its development was informed by the National Education Association (NEA, 1893) Madison Committee's concept of the intensive study of history, its structure by the nineteenth-century collegiate history seminary (H.B. Adams, 1887), and its spirit by Webb's (1955) account of seminar as history expedition. This study describes and analyzes the HWB experimental program with particular regard to: (a) how participants engaged in the program, (b) how participants and audience members were affected by the program, (c) the relationship of the History Without Borders program to the concept of the intensive study of learning (NEA, 1893), and (d) in what ways History Without Borders served as a vehicle for situated learning in history (Lave & Wenger, 1991). The study is grounded in the theories of social constructivism and situated learning.

### Research Questions

The research questions guiding this case study were:

1. How do participants and audience describe the history expedition experience?
2. How does a community-based, extracurricular history expedition enable teenagers to engage in the practice of history?
3. In what ways does an out-of-school history expedition lead to outcomes similar to those the NEA (1893) associated with the intensive study of learning?
4. What is the relationship between the lived experience of a community-based history expedition and Lave and Wenger's (1991) theory of peripheral participation within a community of practice?

## Research Design

### *Introduction*

This section addresses the research design, or protocol, associated with this investigation. In particular it will address: (a) the reasons the investigation made use of the qualitative research paradigm, (b) why the intrinsic case study method was used, (c) researcher identity, (d) the process of case selection and a description of the setting, (e) a profile of the study's participants, (f) data sources and data collection, and (g) data analysis.

### *Qualitative Paradigm*

In light of this my interests, research objectives, and specific research questions, a study employing the qualitative paradigm seemed appropriate. The study's primary research question required a descriptive response from the emic perspective. In other words, the necessity of capturing the history expedition experience in the words of its participants and audience made the qualitative approach attractive due to the thick description associated with the qualitative research paradigm. Furthermore, the very reason that HWB held interest as an intrinsic case study, its one-of-a-kind status, made it less attractive from the perspective of generalization of results. Finally, since the project involved a very limited number of participants (n=6) and lacked diversity with regard to race, academic achievement, socio-economic status, and geography, it was a poor candidate for the quantitative analyses most often associated with linear statistics. With a wide variety of methods available for use within the qualitative research paradigm, it became necessary to determine which particular method would be used during the study.

### *Intrinsic Case Study Method*

Three characteristics of the HWB program lent itself to the intrinsic case study method (Stake, 1995). The first characteristic was that HWB was a unique, one time demonstration of community-based situated learning in history. The second characteristic was that HWB held particular personal interest for this me. The final characteristic was that the primary research question dealt solely with description of the phenomenon.

### *Researcher Identity*

The issue of researcher objectivity and its relationship to validity in qualitative research has received comment from a variety of researchers (Denzin and Lincoln, 1994; Oleson, 1994; Wolcott, 1995). According to Glesne (1999), one method for reducing the influences of researcher subjectivity on the research product is for the researcher to explicitly state his or her biases and subjectivities. By exploring his or her own subjectivities, the researcher can more fully establish his or her identity and give notice to the reader of the subjective lenses that may color the results of the research (pp. 105-112). During this study, I was the primary research instrument. Responsible for the design, planning, and implementation of the study, I also interviewed, observed, and recorded all of the activities associated with the project. Consequently, as an aid to both the reader and myself, I have identified the subjectivities associated with my identity. For the purposes of this study, I identify myself as an Army veteran, an amateur historian, and a teacher. My identity with regard to each follows.

*Researcher as veteran.* While in the military, I observed young men and woman performing tasks of great responsibility while wielding tremendous authority within their

field of expertise. Many of the soldiers with whom I worked were still teenagers, yet were accomplishing crucial, mission critical assignments. My opinion concerning what teenagers could accomplish was forever changed by my experiences in the Army. I watched as they gladly accepted greater responsibility in return for increased authority. All the while, the teenagers were cognizant of the relationship between authority and accountability. I soon came to realize that the teenagers I was dealing with simply wanted to prove how well they could perform when given a mission, the tools to accomplish the mission, the training to use the tools, authority, and a firm understanding of the system of accountability. After five years active duty, I left the Army and settled down as a civilian. I soon realized, as do many veterans, that few people outside of the military understand the camaraderie of the military, its devotion to duty, and the heavy burden of responsibility it places on the shoulders of young soldiers.

My time in the military left me with two overwhelming desires. The first was to bring to the public's attention the worthwhile and honorable service of its military people. Whether in the past or in the present, the story of life in the military holds many lessons for society. The second was an unquenchable desire to provide young people opportunities to excel at tasks commonly reserved for adults. In that vein, I believe that history projects, particularly military history, have much to offer by way of illuminating the history of a nation, state, or a local community as seen through the lens of cataclysmic events. It has been my experience that teenagers crave the opportunity to rise to a towering challenge and to engage in important, adult-like activities that lead to public recognition for their efforts. Creatively structured, history projects can provide

teenagers a mission that challenges them as adults and serves to illuminate the past in ways which speak to them as teenagers.

*Researcher as historian.* I grew up in New York City, attended its public schools, and spent my youth surrounded by its history. On my way to my parent's store, I walked past the Voorlezer's House; dating from 1696 it is the oldest schoolhouse in America. Later on, in high school, I would guide tour groups through that same school. I searched for spent shell casings at Fort Wadsworth, the last defense position surrendered by British forces when they left New York City during the American Revolution. The emplacements I searched for spent shells contained coastal artillery during World War II, artillery that was meant to defend my city from enemy attack. That artillery never fired a shot in anger. Instead, I learned from my relatives and neighbors how enemy submarines during that war torpedoed U.S. ships just offshore. I learned how the beaches I walked had been lit by burning U.S. oil tankers ablaze on the horizon. I watched from my high school mathematics classroom as aircraft carriers made famous in World War II, like the USS Wasp, were towed through New York Harbor to be scrapped at New Jersey's Bayonne Navy Yard. In the summer of 1967, as our nation itself was aflame, I watched from my bedroom window as the National Guard fired into the high-rise tenements of Newark, New Jersey, killing citizens with the same weapons we were using to kill an enemy far away in Vietnam. During the summer of 1969, when my friends were at Woodstock, I was at a summer camp at Valley Forge, just a few miles from the U.S. Army's Valley Forge General Hospital. I watched every day as bus loads of soldiers recently returned from Vietnam were sent there for rehabilitation. As a summer employee of the National Park Service, I cleaned toilets at Federal Hall where

George Washington took his oath of office as the first president of the United States. That summer I regularly lunched at Fraunces Tavern, in downtown Manhattan, where Washington bade farewell to his officers at the end of the American Revolution. My maintenance job took me daily to the Statue of Liberty and Ellis Island through which my ancestors had entered this nation and to which foreign visitors still flocked. To me, history is where you live. In my experience, local history was national history. What had gone on in my hometown was a reflection of what was going on with my nation, and by extension the world.

The fact that history was not relegated only to degreed historians was driven home as I spent a period of time literally making history with my own hands. During my summer vacations in high school, I worked as a stonemason's apprentice at an 18th century restoration. I learned how to build structures from uncut fieldstone, fitting the stones together with no power tools and no mortar. At the hands of a master stonemason, I learned that rocks are neither good nor bad, neither important nor unimportant, nor too big or too small. To humans, a rock is bereft of any intrinsic value or significance until it becomes a factor in a problem. In other words, a rock's importance is derived solely from the unique role it plays in human problem solving. The purpose of an individual stone is not predestined; instead, its purpose is determined within the context of a project of some sort. Given alternative projects, a stone can have many alternative purposes, and, therefore, different significance to the individuals involved. In fact, almost as many structures can be built from a large stone pile as there are masons to plan how to use the stones. In my life's experience, stone structures are not pre-ordained and immutable with regard to form and function. Instead, they are

simply the material incarnation of one person's design of a solution to a problem. In many ways, the mason's stones are similar to a historian's facts.

Only in later years did this I understand that his construction of stone foundations was a perfect metaphor for constructivist learning in history. A fact by itself, like a stone, is unimportant. Its importance is bound entirely to its use and may remain inconsequential until needed to solve a problem. In addition, facts, like their stony counterparts, can be used to solve a wide variety of problems. In the same way a stone's purpose is determined in the mind of the mason, a fact has no particular use or purpose until seized upon by the mind of the historian. As different masons can see the same stone and divine different uses for that stone, so historians can see the same fact and divine different interpretations of that fact.

A second lesson I learned from my experience as a stonemason's apprentice is that sometimes the distinction of amateur or professional is inconsequential. In stonemasonry, the professionals are often involved in projects of great importance and high visibility. Consequently, they have no time to devote to the ongoing, mundane, projects that continue on a week-to-week basis. In those situations, the mundane projects are carried forward by amateur masons of lesser note with help from initially unskilled, adolescent apprentices. In the end, it matters little who built the structure. What matters is whether the structure meets the objectives for which it was built. Similarly, I believe that there is much history to be done, too much, in fact, to be left only to the professionals. To identify and then leave idle projects of public history until professional historians are available to address them is to slow our advancement of knowledge to a crawl. Instead, I believe that amateur historians are capable of



conducting research that is of great interest to the public and may be of great service to the community of practice of history. This, in fact, has often been the story of military history (Millett, 1977); a field within history which amateurs, meaning those without a PhD in history, can dramatically influence. Proof of this can be found in the popular military histories that sweep America from time to time, for example, Tuchman's interpretation of events leading up to the outbreak of World War I in *The Guns of August* (1962), Shaara's book, *The Killer Angels* (1974), concerning the Battle of Gettysburg during the Civil War; and the film *The Civil War* by Burns (1990).

*Researcher as teacher.* Once again, I structured a project-based effort tailored to local history that served to illuminate both United States and European history as well. The project examined the experience of local Polish-Americans during World War I. The project was anchored in a largely unnoticed memorial stone in a cemetery a few blocks from the high school. The inscription on the memorial was in memory of the "sons of the Polish American armored operation of the Azure Army under General Jozef Haller who fought for the freedom of Poland in Champagne France in 1918 and against Bolsheviks in Lwow, Wolyn, Pomorze 1920-1921." Although only two of the fourteen students involved in the project had any Polish ancestry, the teenagers pursued their objective vigorously. Once again, the serious approach taken by the teenagers earned them the opportunity to perform research in a university archive and an invitation to travel to New York City to work in the archives of the Polish Army Veterans Association. While there, the project team visited the World Trade Center complex, strolled on its rooftop observation deck, and engaged in good natured ribbing of the elevator operator concerning who was the better football team--the Buffalo Bills or the New York Giants.

Almost six months later, to the day, the World Trade Center was no more. It was itself a piece of American history. After a year's work, the students had constructed an understanding of a piece of history and delivered it to the community. The project team's research on the Polish Blue Army was considered scholarly enough to be published in the state archives magazine.

My experiences as a teacher reinforced my beliefs that teenagers are capable of performing historical research that has deep meaning to the community. Similarly, the community begins to have deeper meaning to the teenagers as they become aware of how local history ties into the world at large. In the process of performing their research and becoming experts in a narrow area of historical scholarship, the teenagers gain an increased respect for their own abilities, rights, and responsibilities. In short, my experience leads me to believe that teenagers can engage in activities associated with history that positively affect their lives, the lives of others in the local community, as well as the community of practice of history.

### Case Selection and Description of the Setting

#### *Case Selection*

This case study examines the HWB project that was undertaken in North Central Texas during the period 2004-2005. Due to prevailing circumstances, the HWB case was less the product of a selection process than it was the creation of a purpose-built history project to provide an opportunity for study. This section of the study will explain those circumstances and the activities which led to the development of the HWB program.

My interests are associated with how teenagers engage in history when situated in an environment resembling that of a professional historian and provided the abundant resources with which to conduct historical research. Pursuit of that interest led me to recognize the intuitive attractiveness of the intensive study of learning (NEA, 1893), history seminars (Adams, 1884), history expeditions (Webb, 1955), and situated learning (Lave & Wenger, 1991). Having assembled a list of criteria to guide the selection of an existing case, I approached a number of well-known universities and high schools within 300 miles of home. Unfortunately, none was found to be engaging in, or willing to entertain the idea of engaging in history learning that reflected the following criteria:

1. The learning should be project-based and oriented toward production of an artifact that would be open to review by the public and other members of the discipline.
2. The project should engage students as historians.
3. The project should be grounded in situated learning theory.
4. Students should be familiar with United States history, but unfamiliar with the specific topic of investigation.
5. Students should be highly literate with regard to the English language and the Internet.
6. Tools and other resources commonly available to a practicing historian should also be available to participants.

Criterion 1 was selected in order to provide a natural, holistic setting for the meaningful engagement of the participants. By focusing on the creation of a product, activities associated with its creation would become relevant to participants. In addition, offering the product for public critique would stimulate participants' to their highest level of performance.

Criterion 2 was chosen in light of long-held views by some (AHA, 1915) that students other than those in graduate school are: (a) incapable of constructing original research in the manner of historians, and (b) should not be expected to extend the knowledge base of the community of practice. In addition, the ability of students to engage as participants within a community of practice is at the heart of Wenger's (2004) curriculum of identity.

Criterion 3 was selected in light of the necessity to situate the project within an authentic context. While some researchers have examined the ability of students to think historically, their work has not taken place within a situated learning environment, or has not engaged teenagers in their research (Levstik & Barton, 2001; Wineburg, 1991, 2001). If one institutes a situated learning environment for history, one accepts an approach to learning that is often antithetical to the culture of schools. It demands a freedom of movement often curtailed in schools, an acceptance of fieldwork, a relationship between teacher and student that closely resembles master and apprentice, a commitment to exhausting the resources available with regard to the subject on a global basis, and a commitment to project execution and product development according to the values and standards of the community of practice, not the school.

Criterion 4 was chosen because it would ease the students' ability to frame their research topic within the larger expanse of United States history, and would ease this my ability to determine the source of student learning with regard to the particulars of the narrow research topic. In other words, with a narrow enough research topic, it was unlikely student knowledge concerning the topic would be generated by classroom learning, or incidental learning such as television, movies, popular books, or family

stories. The proper selection of a research topic could reduce or mitigate the effect of confounding factors with regard to the source of student learning.

Criterion 5 was chosen because it reduced the chance that student learning would be affected by an inability to read, unfamiliarity with the English language, or the inability to pursue additional learning through resources on the Internet.

Criterion 6 was chosen in order to maximize the authentic nature of the project. By removing the elements of Criterion 6 from the project, it would be easy to undertake the initiative in a decontextualized, abstract mode. Unfortunately, one of the constraints schools must suffer when engaging students in inquiry is their fundamental identity as schools. They are not designed as research centers. They do not have the resources to enable their students to conduct authentic research in history, nor are they generally staffed with faculty experienced in historical research (Ravitch & Finn, 1987; Bradley Commission, 1988). However, if one of the hallmarks of situated learning is ill-formed problems, then open access to multiple sources maximizes the opportunity for students to identify contradictory or corroborating information and gaps in the database. Access by participants to dedicated project equipment such as telephones, facsimile machines, photocopiers, computers with broadband internet access, and scanners is a must. Interlibrary loan and transportation to museums, archives, and special collections that maintain sources of information pertinent to the research project is necessary as well. The ability to immerse oneself in the data for extended periods without regard for the school day is a major requirement of the effort. These are the resources commonly available to practitioners within the community of practice and, therefore, are a necessity for developing an authentic situated learning environment.

I understood that locating an existing program that met the above criteria was a low probability, but it was hoped an existing program might be found that was open to modifications. Initially, I contacted the ROTC programs of three major state universities in Texas to determine if they had an interest in allowing cadets to pursue such a program as part of their professional training. A graduate of Army ROTC, I was aware of the history military curriculum within the Army at large and ROTC in particular. As part of the discussion with the ROTC detachments, I described the opportunity, the project timeframe, the need for the unit history of the Army unit under investigation, and the criteria developed for implementing the project. None of the three programs was interested in screening their program for volunteers. They gave as reasons for this disinclination to participate their belief that the cadets: (a) did not possess the intellectual ability to undertake such an assignment, (b) did not have enough time to participate in the project, and (c) were training for a career in the military not as historians. In the face of rejection by those three institutions, I hoped that a high school could be identified with an existing elective program in history that would be willing to modify the program to meet the above criteria.

Texas high schools offer great potential to sponsor a project like this in view of their curriculum, specifically, curriculum guidance from the TEA (2007b) in the form of the Texas Essential Knowledge and Skills (TEKS). TEKS provides the outline for two high school history electives that could enable the form of project-based inquiry I was interested in studying. The first course is entitled Special Topics in Social Studies while the second is called Social Studies Research Methods. The TEA description of the first course is, "In Special Topics in Social Studies...students are provided the opportunity to

apply the knowledge and skills of the social sciences to a variety of topics and issues. Students use critical-thinking skills to locate, organize, analyze, and use data collected from a variety of sources. Problem solving and decision making are important elements of the course as is the communication of information in written, oral, and visual forms” (TEA, 2007b, ¶ 113.38). The TEA’s (2007b) description of the second course is, “In Social Studies Research Methods, an elective course, students conduct advanced research on a selected topic in social studies using qualitative and quantitative methods of inquiry. The course is designed to be conducted in either classroom or independent settings” (¶ 113.39). Taken sequentially, the two semester-length electives could provide the framework for a year-length experience in historical inquiry similar to that of the intensive study of history (NEA, 1893). Unfortunately, as I canvassed the high schools of North Central Texas, none was found that offered either of the two elective courses. A query I sent to the TEA resulted in their admission that the agency does not track such data and could not provide an existing report to identify schools in the region that provided the electives. Subsequent contacts with seven school districts resulted in none who were willing to entertain the idea of initiating such a course of study. Several of the schools contacted were able to provide feedback that Advanced Placement (AP) courses were of a much higher priority than the two electives I was pursuing. The AP courses come with a structured syllabus, a standard curriculum, teacher training, and the potential for reduced college costs for those students scoring high marks on the AP assessments. In addition, Texas rates its high schools on the number of students engaged in AP courses as well as their passing percentages. Finally, school districts receive financial remuneration for those students scoring above a certain grade on their

AP assessments. None of those characteristics was associated with the two electives authorized by the TEA that I was seeking to find in a local high school. It was becoming apparent I would need to find a solution other than those I initially pursued. In the end, I decided to create a program.

History Without Borders was purposefully designed as a laboratory for studying situated learning in history and it offered a setting rich in possibilities for study (Patton, 1990). I conceived of the HWB research project as a way to make use of a unique collection of historical resources that had remained unexploited by scholars until that time. As a staff member of an oral history program of a large public university in North Central Texas, I had interviewed 16 veterans of the 112<sup>th</sup> Cavalry Regiment, Texas National Guard, the last horse cavalry regiment sent to fight overseas by the Army in World War II. The oral histories of those World War II veterans formed a 1600-page database of eyewitness accounts to significant events during the war. In addition, I was in possession of over 3500 pages of primary and secondary source material dealing the regiment's activities in World War II that supplemented the oral histories. With 1000 World War II veterans dying each day and no history having been written about the regiment's activities throughout the war, I conceived the idea to form a community-based project to exploit the resources at hand in a scholarly manner. Thus was born the HWB Project.

### *Description of the Setting*

*The community.* With regard to the community within which the study took place, the following descriptive statistics provide an illustration of a predominantly youthful, upper middle class, white, well-educated community. The study took place in a city in



North Central Texas. The population in July 2004 was nearly 25,000, split nearly evenly between males and females. The median age of its residents was just under 37 years, and the median household income was slightly higher than \$130,000. Median home value in the city in 2000 was \$341,400. With a population that was 92 % white, a Hispanic population just shy of 4 %, and a black population of nearly 2 %, the city was not racially diverse. Over 95 % of the residents over age 25 and were high school graduates and of those nearly 60 % were college graduates. The city had an unemployment rate of 2 %, and a per capita income in 2000 of nearly \$50,000. For those residents over age fifteen, nearly 80 % were married. Compared to the rest of the state, residents in the study community had home values, incomes, and educations significantly above the state average. At the same time, residents who claimed being a race other than white, city crime statistics, people unemployed, and length of residence in the city were significantly below the state average. The thumbnail sketch is of a city populated by well-to-do, well-educated, white families, living in newer homes. Stable nuclear families consisting of married parents living with their immediate offspring was the rule rather than the exception.

*The school district and school.* Based on statistical data reported by the Texas Education Agency (TEA, 2007a) for the school year 2005-2006, the school district from which the participant volunteers were drawn was in many ways different from other schools across the state in the same way the community itself deviated from the state's demographic averages. The school district had an approximate student population of 7,500. The district's senior high school served approximately 1,100 students, followed a two-year curriculum, and served all of the district's Grade 11 and Grade 12 students.

The target grade (Class of 2006) providing the pool of volunteers for this study numbered nearly 600 students. The school had a much higher percentage of white students attending (89%) than did the average of other high schools in Texas (36%). This reflected a much smaller than average representation of blacks in the school (2%) than was the average across the state (15%), as well as a smaller percentage of Hispanics attending the school (5%) than was average across Texas (45%). The school reported serving a much lower number of economically disadvantaged students (1%) than was average across the state (55%) and reported no students as being limited in English proficiency as opposed to the state average of 15% of students having limited English proficiency. Class sizes at the school the volunteers attended were close to the state average (20), and the average experience of the school's teachers was 14 years as opposed to the state average of 12. As an illustration of the scholastic quality of the students attending the high school from which this study's participants were drawn, in 2005 those students from the high school taking the Scholastic Aptitude Test (SAT) scored a combined average of 1119, nearly 13% higher than the state average score of 992. Greater than 99% of the school's students who took the state examination in social studies passed the examination. The school was commended under the Texas "Gold Performance Standards" (TEA, 2006) for advanced academic courses, advanced placement course performance, college admissions, attendance, implementation of the Texas recommended high school program, and academic programs in the categories of Reading/ELA, Mathematics, Science, and Social Studies. The above statistics paint a picture of an overwhelmingly white high school populated by English-speaking students who perform academically above the state average. Statistically speaking, it could be

expected that the average student from this high school would be able to: (a) read and understand both primary and secondary source documents, (b) organize social studies material both chronologically and thematically, (c) recognize cause-and-effect relationships between historical events, (d) read and understand maps, graphs, tables, and other visuals, (e) understand the connection between geography and human activities, (f) recall factual information, and (g) explain the impact of major scientific and technological innovations (TEA, n.d.).

*The project work area.* The HWB project was based in the family room of my home. That location was chosen because it: (a) adjoined my study with its 5000 pages of primary and secondary source data, (b) contained the audio-visual equipment necessary to the project, (c) was configured for both wireless and wireline broadband services beneficial for Internet activities, (d) was easy for the teenagers to access by foot, or bicycle, and (e) offered a dynamically controlled venue for recording the project sessions.

Participants entered the house through the front door and rapidly developed a tradition of gathering in the well-stocked kitchen as they waited for others to arrive. The tradition allowed them to get last minute gossip out of their system before it was time to work. Once all of the team members had arrived that were to be working that day, the team went to the family room on the second floor of the house (see Figure 1). Although the team conducted most of its business in the family room, there were other rooms the team used on the second floor. Three bedrooms on that floor were equipped with desks and chairs, desktop computers with broadband access, and telephones. Their use as satellite research workstations was helpful when the team split-up into research pairs

during a meeting. In addition, each bedroom had an adjoining full bath available for participants use.

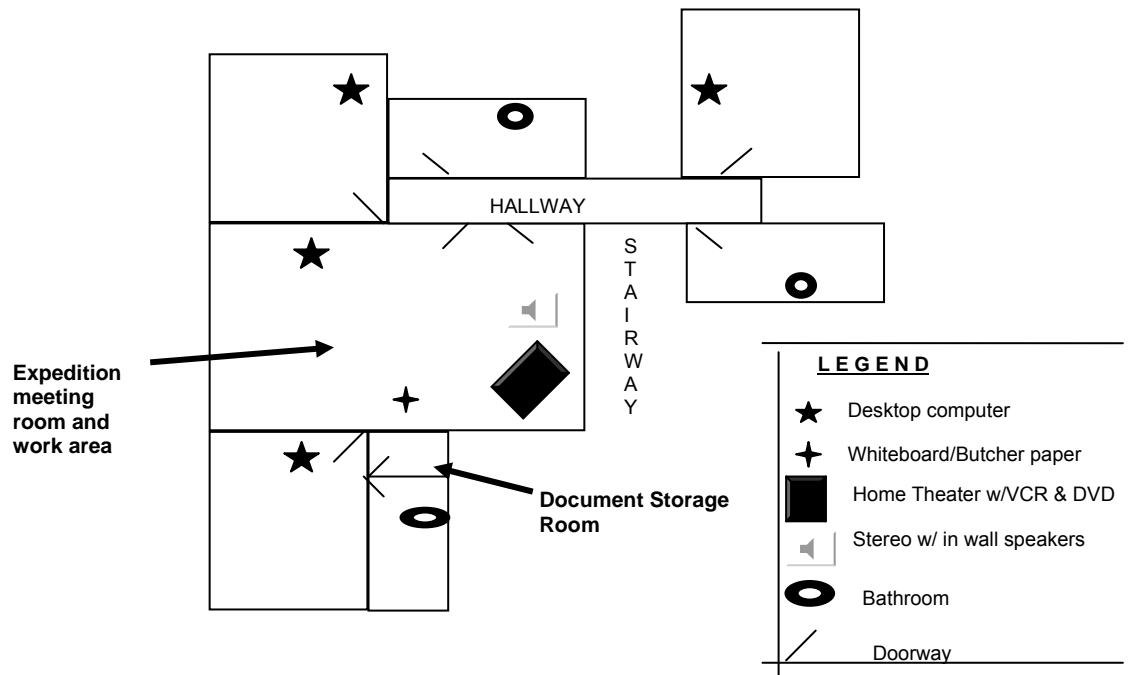


Figure 1. Floor plan of expedition work area.

## Participants

### Participant Recruitment

Upon receipt of the University Institutional Review Board's (IRB) approval for the human subjects research plan application (IRB Application # 69474931, approved 9/15/2004), recruitment of participants began. Recruitment of student participants in the History Without Borders project involved a snowball recruiting procedure in which the first recruit was responsible for recruiting the next participant. Beginning with the first participant, my son, the procedure continued iteratively until my goal of six participants was realized. Since this was an out-of-school activity, I did not have to negotiate entry to

an institution or receive institutional permissions with regard to access to the teenage participants. Recruitment involved me, the teenage participant, and the teenager's parents or legal guardian. A recruitment letter (see Appendix A) was provided to each of the potential participants during the snowball recruiting process. By returning the interest response form attached to the recruitment letter signed by both the teenager and a parent, the teenager signified his/her interest in learning more about the opportunity. Potential participants and their parents were invited to a meeting explaining both the HWB history expedition and the associated case study investigation. As per the demands of my IRB and the community of practice of qualitative researchers (Miles & Huberman, 1994), consent forms were acquired from all who participated in the project. At that meeting, both the expedition consent form (see Appendix B) and assent form (see Appendix C) were reviewed as well as a description of the University's IRB mission and process. Any questions concerning the project and associated investigation were answered at that time. Parents and their child had up to ten days in which to ask further questions and determine their interest in pursuing the opportunity. By midnight of the tenth day after receiving their consent and assent forms, it was necessary for those wishing to continue their participation in the project to have turned in to the principal investigator the executed consent and assent instruments with their associated signatures. Receipt of an executed consent and assent form signified the successful recruitment of a student participant.

During the meeting between me, the potential participants, and their parents, the recruitment letter was reviewed with particular regard to the following items:

1. Participants were being recruited by HWB, an extracurricular, university sponsored, educational program. Participation required a commitment in excess

of 250 hours for its one-year duration.

2. The project's purposes included: (a) original research, (b) interviews of 112<sup>th</sup> Cavalry veterans, (c) an introduction to local and regional museums, archives, and research libraries, and (d) production of the first unit history of the 112<sup>th</sup> Cavalry.
3. Participants would receive no academic credit for their work. By agreement between HWB and their high school, however, hours spent in service to HWB could be counted as community service hours. This helped to satisfy their high school's standard of 100 community service hours required, in part, to graduate as a Texas Success Scholar.
4. HWB committed to providing participants the opportunity to accrue community service hours, perform leadership roles within HWB, engage in public speaking, and travel regionally for research purposes. In addition, participants would be listed as co-authors of the final report, gain valuable experience by engaging in the practice of history, and become an expert in a narrow portion of military history.
5. I identified my role as project leader and reviewed my past experiences as a way to minimize concerns of the potential participants or their parents.

### *Participant Profiles*

*Common participant characteristics.* With regard to general academic ability, the TEA (2007a) statistical summary of the high school the teenagers attended is illustrative. Consistent with the statistical summary, all of the teenage participants spoke English as their native language and were highly literate. They attended a high school that routinely received commendations for the academic performance of its students. As an illustration of academic pool from which the volunteers were drawn, of all the project participants the one with the lowest cumulative grade point average (GPA) had earned a 3.62 GPA. That GPA placed that participant in the 36th percentile of the high school. Unfortunately, the TEA statistics speak little about the ability of district's students with regard to the practice of history. Since the Texas social studies assessment given the participants consisted of 75 multiple-choice questions and no essays, knowing that >

99% of the district's students passed the assessment says little about the students' ability to engage in critical thinking, write historical essays, or their ability to organize a research initiative in history.

All of the participants in the HWB project participated very publicly in the effort and at various times spoke to assembled groups. Having received parental consent, participants granted interviews to regional newspapers, magazines, and television news correspondents concerning their activities on behalf of the World War II cavalry unit. Photos of the participants, their identities, and their relationship to the HWB project became common knowledge within the community. However, in accordance with the guidelines of the University of North Texas Institutional Research Board (IRB), participant related data within this study are confidential. Accordingly, each of the participants is known by a pseudonym throughout this report. This ensures that the personal data gathered from participants as well as observations concerning the participants are not attributable to a particular participant. In other words, although their participation in the HWB project is not confidential, personal data concerning participants gathered during the course of the project is confidential. Consequently, what follows are descriptions of the six participants using pseudonyms and other methods of separating personal data from specific attribution.

*Individual participant characteristics.* Sierra, age 18, was another exceptional student. Awarded honors as a National Hispanic Scholar, Sierra was also a Texas All-State Band member, Texas state solo and ensemble participant, and a National Honor Society member. She was involved in a number of extracurricular activities including marching band, and the high school Spanish club. In her senior year, Sierra limited her

extracurricular activities and took a paying job at a local retail bookstore. Sierra was intent on going to medical school and looked forward to being the first in her family to complete college. With a tendency to shy away from the spotlight, Sierra was intimidated by public speaking. Instead, she preferred speaking softly, answering direct questions, and was prone not to engage in elaborate responses in either verbal or written form. In addition, she felt uncomfortable in fields where arguments were made supporting solutions that were neither black nor white, but, instead, some shade of gray. An accomplished student of mathematics and science, Sierra consistently enrolled in advanced courses in those subject areas. In history, however, Sierra felt less confident. In her junior year, Sierra enrolled in regular U.S. history as opposed to other courses in U.S. history that were more advanced. Sierra's interest in the project sprang from three different sources. First, Sierra responded to doing something challenging that was also unique and would lead to a concrete advancement of knowledge. Second, Sierra's parents had each been involved in the military for a period of time and the project might give her a better sense of understanding her parent's experiences. Last, and certainly not least, Sierra was involved in an ongoing relationship with one of the male participants in the project. Although her involvement in the project would come at the expense of time with her family, her parents were very supportive of her engagement in the project.

Mike was in a unique position in that he was both a participant and my son. Consequently, Mike was under a different set of pressures with regard to his performance in the project than other participants may have been. Mike was born and raised in New York, but at age 13, the family moved to Texas. Upon entering high



school, he participated in the marching, concert, and jazz bands. In his junior year in high school, he participated in the Congressional Youth Leadership Conference in Washington D.C. Though he considered himself a New Yorker at heart, he said that the best part about moving to Texas was all the friends he made. Mike was a good student, but not exceptional. He did not find reading an easy task and struggled with lengthy writing assignments. In spite of these difficulties, Mike was able to persevere and graduate with the Texas recommended diploma in preparation for college. Based on his service to the community--a minimum of 100 hours--Mike was able to graduate as a Texas Success Scholar. One area that Mike was interested in was military history, particularly the history of military weapons. Although his family owned no weapons, he was familiar with them through family conversations, movies, and books within the home. Both of Mike's grandfathers had served in World War II, as had one of his grandmothers. His father and his father's brothers had also served in the military. While his mother had never served in the military, she had taken marksmanship courses while in college. In short, Mike's home environment reflected his family's past military service and continued interest in military matters.

Victor was a participant who, although originally from Florida, proudly considered himself a Texan. He was vice president of his senior class, tuba section leader in the marching band, and a youth ambassador to Japan. In his spare time, Victor enjoyed attending various student-led Bible studies and teaching advanced math at a local learning center. Although a good student, Victor was not an exceptional student. In his junior year, he chose a regular course in U.S. history as opposed to a more advanced offering in that subject. This is not to say that he did not work hard at his

studies. In fact, to the best of his ability, Victor did everything reasonable he could to raise his grades. Illustrative of his commitment to academic achievement is the fact that Victor enrolled in a Scholastic Aptitude Test (SAT) preparatory program. In preparation for the new SAT introduced in 2005, Victor attended 14 weekend classes each of which was two hours in length. Before he had even taken his first SAT, he had already signed up for another in the belief he might improve his initial score on the subsequent SAT. Victor also realized he needed an experiential component to his preparation for veterinary school. Consequently, in his senior year, Victor took a job with a local pet store in order to gain experience with animals. In light of his interest in horses, it is not surprising that Alex found his involvement in the study of a cavalry outfit an interesting proposition. Contrary to the foregoing participants, in conversations concerning family ties to the military, Victor admitted no family connection with the military. His interest in the project was initially driven by his interest in veterinary science.

Delta was born and raised in Texas and considered that an important part of her identity. Comfortable in classroom settings and a good student, Delta enjoyed school and was a member of the National Honor Society. She never considered history among her favorite school subjects and opted to take regular U.S. history in her junior year as opposed to AP or Honors U.S. History. She displayed a deep personal commitment to the community and by the time she was a senior in high school had accumulated over 1000 hours of community service. An officer in the local chapter of the National Charity League (NCL) as well as the Spanish club, Delta was also a section leader in the marching band. She enjoyed music and planned on pursuing music in some way throughout college. In addition to her extracurricular activities involving community

service projects, Delta had a paying job with the local parks and recreation department during her senior year in high school.

Charlee was Delta's sister and like Delta had been born and raised in Texas. Likewise, she shared the same commitment to community service. Charlee's membership in the National Charity League illustrated her family's belief that community service was a lifestyle, not a one-time activity. Charlee joined the NCL, along with her sister and mother, and in doing so committed to a six-year mother-daughter program committed to charity work and social living. Among the responsibilities associated with membership were a commitment to community service, leadership within the organization, social gatherings and entertaining, and attendance at various cultural events. Consequently, Charlee was schooled in comprehensive event planning, time management, leadership skills, proper dress, and both business and social etiquette. Charlee and her sister volunteered at the local senior citizens center and gained an easy familiarity with its elderly members. Intergenerational events and social gatherings were familiar territory for the two sisters. With a GPA > 3.5, Charlee was a good student, yet chose regular U.S. history in high school over more advanced alternatives. She was very interested in attending one of the service academies and had an interest in developing a better understanding of the military. Consequently, the HWB project offered her the opportunity to learn more about the military, albeit the Army of World War II, as well as an opportunity to become involved in a community service project. While there was no direct family connection to the military, Charlee's family valued Texas history, community service, and enriching their daughters' education outside the classroom.

## Conduct of the History Expedition

The history project had as its goal the publication of a history concerning the cavalry regiment in World War II. Publication was defined as the submission of a monograph concerning the regiment's wartime experiences to the state government and to the regimental veterans association. As the HWB expedition leader, I developed the integrated research and production plan for the expedition. It was designed to lead the teenagers on a journey from ignorance to expert subject matter knowledge across the course of one year. The activity-based plan consisted of the following goals listed sequentially:

1. Introduction to the regiment through its oral histories. (Reading and discussion.)
2. Introduction to the equipment and weapons of the regiment. (Field trip.)
3. Introduction to the veterans in a face-to-face setting. (Field trip.)
4. Introduction to a summary of the regiment's activities: The regimental war diary. (Reading and discussion.)
5. Research at the state military archives and interviews of veterans. (Field trip.)
6. Development of a chronology and identification of significant items. Identification by students of the individual investigations they wished to conduct with regard to the regiment. (Project meetings.)
7. Research involving newspapers, magazines, newsletters, and wire service photos from the time. (Field trips involving microfilm research, Internet research, and special collections in research libraries.)
8. Research of materials from the National Archives, Naval Historical Center, and Army Personnel Center. (Reading and discussion.)
9. Research concerning how other units and commanders felt about the regiment—both friendly and enemy. (Reading, Internet investigation, written interviews, movies, and discussion.)
10. Identification and rectification of anomalies, contradictions, and other abnormalities present in the data. (Reading, discussion, and targeted research.)

11. Final chronology and identification of significant events. Identification of the required chapters for a representative historical narrative of the regiment. Development of a style plan for the final product, individual writing assignments, and schedule to completion. (Project meeting.)
12. Rough draft. (Reading and writing.)
13. Final draft. (Writing.)
14. Submission of final product. (Field trip.)

Due to the minimal coverage provided the regiment in the literature, virtually all of the source material was in the form of primary sources. Documentary evidence took the form of the veteran's oral histories (see Appendix D), regimental records (see Appendix E), Army records (see Appendix F), state National Guard records, letters, as well as translated enemy documents. Imagery in the form of Signal Corps photographs (see Appendix G) and movies was used, as was artwork of the regiment by combat artists (see Appendix H) and a Hollywood movie featuring the regiment in one of its World War II assaults. Artifacts from the period were accessed through the private collections of the veterans, or were available for research purposes through regional museums, or living history groups. These artifacts allowed the teenagers to experience the accoutrements of cavalry life in a sensory way and helped bridge the gap between what they had read and what they had experienced thus far in their teenage lives. Interviews, both oral and online, allowed participants the opportunity to communicate with individuals who served alongside the regiment or who had supported the regiment during the war. E-mail communications with current charter boat companies, missionaries, and private pilots in the Southwest Pacific allowed participants to conduct contemporary virtual investigations of natural phenomena that otherwise would have been beyond the capability of the teenagers to perform on their own. Newspaper and magazine articles

from the period provided another source of information concerning both the regiment's activities and the context in which they were undertaken. Finally, secondary sources in the form of official military histories and memoirs provided a baseline concerning what was known and had been published about the regiment prior to the efforts of the history project.

Reading was critical to the success of each phase of the project and was primarily undertaken by the teenagers at home. They were expected to be familiar with their materials at project meetings and were required to hand in summaries of what they had read since the last meeting as well as the information they found most significant in their reading. They were introduced to a color-coded scheme of highlighting their text (with all sources used by the students being duplicates of the originals) that allowed them to identify what they believed was significant, very interesting, puzzling, or boring within the text (see Appendix I). In the first reading assignment, all participants read the same oral history and reported at the next project meeting. The meeting became an opportunity for me to provide guidance concerning how to read historical documents and how to criticize their usefulness as a data source from a historiographical perspective. Then, another round of reading took place in which the participants all read the same oral history, but from a different veteran. After ensuring the teenagers were proficient in their reading of the second oral history, I subsequently assigned readings in a jigsaw fashion by distributing several sources to teams of participants, or individual participants for reading. Discussions at subsequent project meetings allowed the teenagers to reflect on the different perspectives reported in the sources concerning the same phenomena.

Project meetings were generally four hours in length and involved group discussions as well as mini-classes. The group discussions generally evolved from questions, or comments the teenagers had about what they had read. Often, I engaged the students in Socratic-style questioning in order to uncover the source of an individual's particular understanding of a phenomenon, to uncover an individual's unstated beliefs or biases concerning the effort, or to show the thought process employed by historians in their disciplinary activities. Mini-classes helped explain the context of the documents they were reading. Using paper flip charts and markers, I drew diagrams, maps, taxonomies, and procedures in order to illustrate answers to questions the teenagers had developed or to remove obstacles to their understanding. Sometimes the mini-classes were used to prepare the teenagers for the next activity they would be engaged in and would provide context for their efforts. All meetings were recorded.

Field trips were a planned part of the project and were used to answer questions the teenagers had developed and to provide experiences that would increase their understanding of the phenomena they were investigating. By way of example, a trip to a museum located several hours away provided participants the opportunity to see, smell, and handle a variety of equipment described by the soldiers. On that same trip, participants were eyewitnesses to a living history reenactment of a World War II assault on fortifications held by the enemy in the Pacific Theater. The teenagers were able to see, smell, and hear many of the weapons the soldiers described in their oral histories as well as the methods of employing those weapons. A second field trip brought the teenagers to the annual reunion of the cavalry regiment. There, the teenagers met with

many of the veterans whose oral histories they had read as well as other veterans who had not been interviewed.

The above elements were the situated environment within which the teenagers worked. Close at hand were their primary sources, secondary sources, and means of communication. If questions arose that could not be answered by the materials at their project base, field experiences were arranged within the state to try and gather the required information. If online searches resulted in the identification of required sources in another state, they were requested through interlibrary loan, or the project leader traveled out of state to retrieve them. Mentors in the form of me, several historians, and the veterans themselves were available to the teenagers. In short, the project operated, unlike many schools, with few constraints regarding the teenager's access to information, means of analysis, use of time, or exhibited behaviors. Instead, the teenagers were treated as adults and expected to perform their activities in a way that would bring credit to the project.

## Data Collection and Procedures

### *Introduction*

A research study's value to the field often hinges on the data used in the study as well as the data analysis procedures employed by the researcher. Since the development of a research design rapidly turns into an exercise in informed decision-making, the researcher bears the responsibility for informing the reader of the rationale behind many of the decisions made in the research process (Meloy, 2002). This section describes the data sources and data analysis procedures undertaken in support of this case study as well as the rationale for their use.



## *Data Sources*

The focus of the intrinsic case study is to provide a greater understanding of the phenomenon under investigation (Stake, 1995). The nature of the phenomenon in terms of its context, complexity, and relation to other phenomena are all part of developing an understanding of its extraordinary nature. Consequently, those sources of data which shed light on those characteristics need to be considered by the researcher. With regard to this study, the criteria used for choosing data sources included their ability to illustrate the context of the HWB project, the products of the project, the effects of the project, and the experiences of participants in negotiating their personal trajectories during the course of the HWB project. Those criteria when operationalized as questions begin to determine any data source's appropriateness for inclusion in the study. Therefore, sources that could help answer the following questions were considered for use in the study:

1. What was the context of the project?
2. How was the project's objective determined?
3. What was the structure of the project?
4. How did participants engage in the project?
5. What did participants think about the project?
6. What did the project produce in terms of interim and end products?
7. What effect did the project have on its participants and audience?

In general, sources of data for case studies such as this include: interviews, observations, documents, records, and film or video (Strauss & Corbin, 1998). This study made use of each of those general categories of data. Specific data sources as well as the rationale for using them are reviewed below.

## *Inventories*

*Participant preferences.* After welcoming the participants into the project, the project leader referred the six participants to an online personality assessment (Jung Typology Test, n.d.) that is offered by the Israeli organization HumanMetrics. The test is based on a modified Myers-Briggs Type Indicator (MBTI) and offered free of charge to the public.

Myers-Briggs developed the instrument to identify an individual's personality type according to that individual's forced responses to a series of dichotomous questions. The questions involve four preference scales with the poles of each scale represent a unique characteristic. The four scales are marked by the following dichotomous poles: (a) introversion-extraversion, (b) sensing-intuition, (c) thinking-feeling, and (d) judging-perceiving. Therefore, the four preference scales represent eight characteristics. Based on the individual's preferences as exhibited in their responses, the individual is categorized into one of 16 personality types (Myers-Briggs Type Indicator, Form M, 2001).

The reliability of a participant reporting the same results on a test-retest of the MBTI, Form M, according to the Mental Measurements Yearbook (2001), is an average of 65% with a range of 55 to 80% (Myers-Briggs Type Indicator, Form M, 2001). The report was based on three test-retest samples initiated four weeks apart. The same source tested the construct validity of the four-factor MBTI using a confirmatory factor analysis. The predicted four-factor model turned out to be the best fit for the data. According to the Mental Measurements Yearbook, the Form M version of the MBTI is more reliable and has greater validity than previous versions. According to the Mental

Measurements Yearbook: “The MBTI is best used in situations where basic information regarding personality must be presented to lay individuals for self-understanding; it should not be used to make specific decisions about an individual” (Myers-Briggs Type Indicator, Form M, 2001).

Based on the above, the MBTI, Form M, would suffice to provide insight to the participants and researcher concerning the preferences of the participants. Unfortunately, while HumanMetrics offers a modified version of the MBTI, it provides no insight on whether it used the MBTI, Form M, or an earlier less reliable version of the MBTI. In addition, HumanMetrics provides no data regarding how it modified the MBTI, who designed the modifications, or the reasons for the modifications. Finally, HumanMetrics offers no reports of the instrument’s reliability and validity as determined by objective tests. In fact, a disclaimer at the HumanMetrics Web site states: “Although the information and test answers contained herein have been compiled from sources believed to be reliable, humanmetrics.com makes no guarantee, representation, assurance or warranty, express or implied, as to, and assumes no responsibility for the correctness, sufficiency or completeness of such information or answers or of the scoring of tests contained herein” (HumanMetrics, n.d.).

I explained to the participants’ that the modified MBTI they took online did not adhere to the commonly accepted practices for test development. Consequently, the average reliability of 65% for the MBTI, Form M, could not apply to their results. In short, I explained to the participants that their results, as interpreted by HumanMetrics, might not be reliable or valid. After some discussion, the participants were comfortable that their answers to the 72 items on the HumanMetrics instrument spoke for

themselves. The participants agreed that rather than depending on HumanMetrics' interpretation of their item responses into a standard four-letter descriptor of their personality type, their answers should be interpreted, instead, at face value. As a result, for the purposes of this study the 72 questions asked by HumanMetrics were not treated as an MBTI, but, instead, as a simple inventory of the participants' preferences. Participant responses are taken at face value. Of the 72 items HumanMetrics asks on its online inventory (HumanMetrics, n.d.), face value responses to 34 of the items are of interest to me (see Appendix J).

### *Interviews*

Interviews with participants and audience members I conducted were based on a semi-structured protocol commonly used by oral historians (Ritchie, 1995). According to this protocol, the interviewer develops an interview outline which contains the open-ended questions that will be asked of the interviewee. The interview progresses through the outline and sequentially addresses various topics of interest. The interview outline, however, is but a guideline. Digressions from the outline can occur as opportunities of interest arise during the interview. In addition, many of the intended questions may never be asked as they are answered by the interviewee in response to other questions.

As the interview progresses, the skilled interviewer makes use of what has been called the funnel technique (Ritchie, 1995). Using that technique, the interviewer engages the interviewee in each new topic with questions that are initially broad and open-ended. As the interview progresses, the skilled interviewer presents the interviewee with questions that require ever narrowing responses. By the end of a topic,

the interviewer proceeds with closed questions in order to obtain information of a factual nature. Once the interviewer has exhausted the questions of interest regarding a particular topic the interview progresses to the next topic.

*Assessment of Participant Knowledge.*

During the course of the project, participants would be using a wide variety of sources. Most of the sources required at least a rudimentary knowledge of the Army, World War II, the Pacific Theater of operations, and the contextual background to the war. Since a foundational belief of constructivist education is that the learner brings an existing schema to the learning process (Newman, Marks, & Gamoran, 1996), it was necessary to determine what the participants already knew so that an appropriate starting point could be chosen by the project leader. As an aid in this process, pre- and post-project interviews were conducted with the participants concerning their knowledge of the project topic.

The format of the interview was the same for all participants. Participants were individually interviewed by me. Questions were of a closed nature since the researcher was interested in determining each participant's factual knowledge of the research topic (see Appendix K). The interviews were not tape-recorded. Instead, the answers of the participants were recorded on individual copies of the interview outline by student volunteers who were not project participants. The interview outline with its recorded answers was reviewed by both the interviewee and the interviewer for accuracy. I developed the questions used during the interview based on my knowledge of World War II. The interview outline was reviewed by three experts, veterans of the regiment, to confirm the face validity of the questions as well as the answers I developed to the

questions. Based on the comments of the three experts, as well as two public historians, the extent of the questions in the interview was broadened. It was generally agreed that while the project dealt with the activities of an independent cavalry regiment that served in Texas, the South Pacific, and the Southwest Pacific, the regiment's war took place within a much larger war fought around the world. Therefore, interview questions should address not only the narrow topic of the cavalry regiment in World War II, but, also, general knowledge of World War II.

With further aid from outside experts, a determination was made that a contextual understanding of the regiment's activities would require a strategic knowledge of the causes of World War II, the alliances formed to fight the war, the nations involved in the alliances, the leaders of the alliances, and alliance objectives in the war. Knowledge at the operational level would include the theaters of operation, theater commanders, as well as major operations and campaigns. A tactical level of knowledge was required with regard to structure of the Army, structure and mission of the cavalry, major military units in theater, weapons and tactics, and battles. The foregoing contextual knowledge was necessary to truly understand the implications of the experiences of the cavalry regiment under investigation. Finally, questions were included determine how much specific knowledge of the cavalry regiment's experiences during World War II was known by each participant.

#### *Participant Thoughts on the Project Experience*

At the heart of qualitative research, particularly phenomenological research, is the primacy of the participant's perspective. The insider's view, or emic perspective, of the participant, as opposed to the outsider's view, or etic perspective, provides the

greatest opportunity to capture what it was like to experience the phenomenon under investigation. In addition, individual interviews of participants provide the opportunity to view the phenomenon from the various perspectives of the participants' individual lived experiences (Strauss & Corbin, 1998). No two accounts will be exactly the same, and from that diversity of perception should spring a richer understanding of the phenomenon (Stake, 1995). Throughout the project, participants were asked to describe their experiences with HWB. In one-on-one interviews lasting approximately one hour, or as part of larger team gatherings, participants responded to open-ended questions (see Appendix L) and their responses were tape-recorded. The audio recordings were then transcribed and entered into the research database. Each participant engaged in two interviews with me of a one-on-one variety during the course of the project.

An important characteristic of the interviews is that it provided a private venue for discussing the project. Although participants had the opportunity to comment on the project in other venues, many of those venues were public forums. Due to the public nature of the forums, it is questionable as to whether participants would provide comments critical of the project. The one-on-one interviews provided a private forum to address issues which participants wished to address without seeming to publicly criticize the project. That being said, it is understood that some participants would not be prone to criticize the program since the interviewer was the project leader and founder. With that realization, prior to the interviews participants were urged by the project leader to speak frankly and honestly about the HWB project.

### *Audience Thoughts on the Project Final Product.*

The primary mission of the HWB project was to record and chronicle the experiences of the last mounted cavalry regiment deployed overseas in World War II. The fact that the Army and the Texas National Guard had never published a unit history of the regiment weighed heavily on its octogenarian veterans and their families. The HWB project set out to rectify that situation. Whatever form the final product of the HWB project took, it was important that feedback be obtained from the veterans and their families.

Once the project was completed, I had 100 copies of the final report printed and bound. Copies were mailed to 20 veterans, the families of 15 deceased veterans, eight military historians, 10 high school or college history teachers, the curators of 10 military museums or research collections, and three documentary film makers. An additional 25 copies were provided to the Texas National Guard. A cover letter provided a short description of the HWB project, the reason why the recipient was receiving a free copy of the report, and a request to provide me feedback concerning what the recipient thought of the HWB idea as well as its final product. In addition, a human subject research consent form was included in each package along with a stamped, self-addressed envelope. Attached to the cover letter was a list of questions recipients could use to help frame their responses (see Appendix M).

### *Observations*

During observation the job of the qualitative researcher is to create a record of events that provides a “relatively incontestable description” (Stake, 1995, p. 62) of the phenomenon. Stake acknowledges, however, that there is no single type of qualitative



research. Instead, he asserts that most qualitative studies fall in a range between those which at one pole use coded qualitative data to serve the purposes of quantitative analysis to those at the other pole which use solely story-based narratives. According to Stake, the more the qualitative observer departs from a quantitative approach the more the observer looks to record “good moments to reveal the unique complexity of the case” (Stake, 1995, p. 63). In my role of leader-observer, I sought to provide an incontestable record of the HWB project.

I was involved in all official activities of the HWB project from start to finish and was in a unique position to observe project activities. Between 35% to 40% of the project meetings were tape recorded and those recordings provided an auditory database that could be explored months after the event. I took notes at all meetings and kept a journal regarding all HWB activities. Throughout the project, an easel with a paper flip chart pack was used instead of a whiteboard. All paper flip charts from the project were retained for further analysis and became useful visual artifacts which complemented the audiotapes of the meetings.

#### *Notes on Meetings, Practical Exercises in Historical Thinking*

The use of field notes and journals in qualitative research are a way to track the progress of the investigation, begin analysis of data early on in the project, and record the thoughts and feelings of the researcher as the project progresses (Glesne & Peshkin, 1992). I found it too difficult to keep both a set of field notes and a journal. The cognitive and my affective responses (which should have found their way into a journal) to my objective observations as observer (which should have been recorded as field notes) were inextricably connected. This due to the fact that my objective observations

became the context for his often subjective and affective responses to those observations. Consequently, I decided not to erect a virtual wall between the two by keeping them in separate documents. Instead, I kept them in the same electronic journal. Great effort was placed, however, in keeping the two sources of data separate within that journal by use of a pattern of observation-personal response throughout.

Through the use of a journal, I kept notes on the progress of the project, phenomena of note of both positive and negative nature, assessments of the participants' ability to manipulate and apply the knowledge they had learned, interventions designed to teach new skills or correct misconceptions, and my responses to the same. Compiled by in my role of leader-observer, the notes reflect my concerns regarding not only the historical investigation of the cavalry regiment and the ongoing operations of the HWB project, but, also, my concerns regarding what the project meant to its participants and what they were getting out of it.

### *Documents*

*Participant draft products and final products.* Process portfolios have been an accepted means of assessment for student work for many years (Lemon, 1992; Burkhart, 1996; Walker, 1998; Orland-Barak, 2005). I maintained a process portfolio for each participant consisting of all draft and final documents related to the creation of the final project monograph. In preparation for the final report, participants submitted to the project leader the chapters each was responsible for in draft form. Draft chapters were submitted electronically as Microsoft Word documents. Then the project leader used the comments function of Microsoft Word to insert editorial comments into the draft product. Once the editing function was completed by the project leader, the draft

document was returned to its participant author for further work (see Appendix M). All draft products submitted to the project leader were saved and archived on the project leader's computer as well as on a back up external hard drive.

*Project final report.* The final product of the project was a monograph which, when professionally printed and bound, ran 312 pages of text and included 35 pages of notes and references. The monograph was a reflection of the collective knowledge of the project team and included chapters on the men's experiences growing up during the Depression, each of the places the regiment was posted, each major battle the regiment fought, their horses, equipment, weapons, and the medical aspects of the regiment during World War II. With the exception of the project leader, the final report was an accurate reflection of what the participants had learned about the regiment during the project.

*Transcripts of participant final speeches.* Twice during the course of the project, participants were asked to prepare individual remarks for use at public gatherings. In each instance, participants were requested to forward their remarks in draft form to the project leader. Their comments were archived as Microsoft Word documents on the project leader's computer and backed-up on an external hard drive. Their comments serve as a record of what each participant wished to say publicly regarding the project and their involvement with the project at the time the comments were drafted.

*Transcripts of participant comments to media.* As the project was drawing to a close, great interest was aroused in the local media regarding the project, its participants, and the history of the regiment. A number of participants were interviewed by regional newspapers as well as a regional television network. The comments of the

participants as recorded and published by the media are a record of what the participants were interested in saying about the project publicly.

*Commendations from various Texas organizations.* The successful completion of the project resulted in the participants being commended individually by both the Texas legislature and the Texas National Guard. A letter of commendation was mailed to each of the participants by the local representative to the Texas Legislature in recognition of the participants' service to the community and for their efforts on behalf of Texas history. The project team was invited to the state capital in order to receive the commendations of the Texas Adjutant General who has the responsibility of running the Texas National Guard on a day-to-day basis. Each participant received a certificate that spoke eloquently of the service and sacrifice each made on behalf the Texas National Guard and the State of Texas. While the commendations clearly serve as examples of the public recognition provided the participants, they also serve to highlight those areas which the agencies believed were most commendable.

*Internal memorandums and directives.* As with any large project, the HWB project generated a large amount of internal communications. In the case of HWB, most of the communications were in an electronic format. Documentation in the form of e-mails, schedules, memorandums, and templates were distributed to the project participants via Internet. All project-related electronic communications via the Internet were captured and archived by the project leader and became part of the research database.

*Project proposal.* The HWB history project and my investigation of that HWB project from an educational perspective were not only connected, they were

conterminous. As a result, the information I provided my university's IRB regarding participant recruitment, forms of consent and assent, the structure of the study as well as involvement of other institutions, and the project schedule were valuable sources of information for reconstructing the HWB project for this investigation. The IRB proposal for this project became an important source of data since it contained my original ideas regarding the research plan not only for this investigation, but by necessity, the HWB project as well.

### *Records*

*Film and Video.* Video files of television news coverage of project. During the culmination of the activities associated with the project, the local news affiliate of a national television network broadcast a report on the HWB project. As project participants prepared for a commemoration ceremony honoring the regiment's activities, the television crew recorded their activities. During their visit, the television station interviewed one of the participants as well as the project leader. I purchased the video files associated with that news report in a digital format and placed on a digital video disc (DVD). The video file records the thoughts of both participants as well as the commentary of a broadcast network regarding those activities.

*Photographs of project activities.* During the course of the project, various individuals photographed the participants as they engaged in various activities. The photographs document various details regarding the project that might otherwise be lost. Among the details documented by the photographs are the attendees at various project functions, the physical context for those functions, weather conditions, manner of dress, and the purpose of the function itself. With regard to artifacts, the photographs

provide a detailed, color, visual, scale-record of the object. As a result, the photographs have value as a database from which the thick, rich descriptions (Geertz, 1973) required in qualitative narratives can be drawn.

### *Artifacts*

*Regimental reunion.* Through the auspices of the regimental veterans association, the HWB project became part of the regimental reunions held in 2004 and 2005. While attending those reunions, participants gathered a varied number of artifacts to include: regimental place mats displaying the regiment's coat-of-arms, motto, and list of major battles and campaigns; song books reflecting the popular songs the men listened to while in the Southwest Pacific during World War II, Christmas tree ornaments painted with the regimental symbol, and various pins and cap badges worn by regimental veterans. Which of these artifacts were valued most highly by the participants and how they were maintained or disposed of by each participant reflect on the perceived bond between the HWB participants and the regimental veterans.

### Analysis of Data

With regard to intrinsic case study, the researcher seeks to understand the case, identify pivotal and significant aspects of the case, and provide the reader access to those aspects in as naturalistic, or contextually descriptive, a fashion as possible (Stake, 1995, pp. 76-77). According to Stake, people learn through generalizations from authorities (e.g., teachers, scientists, and specialists), and generalizations based on their own lived experience (p. 85). Since there are two major forms of generalization, that based on authority and that based on experience, and, since people learn from both sources of generalization, Stake asserts intrinsic case studies should address both

sources (86-87). To achieve this goal, researchers should analyze intrinsic case study data with regard to both propositional generalizations (the researcher's assertions) and naturalistic observations (thick description of the phenomenon). By presenting the reader both propositional generalizations and naturalistic observations, readers may be influenced by descriptions of phenomena which resonate with their own experience as much as, or even more than, the researcher's authoritative assertions (pp. 85-86). The process by which the reader makes meaning of the case through the combined influences of the propositional generalizations made by the researcher and the vicarious experiences presented by the researcher in the form of thick description is called naturalistic generalization (Stake & Trumbull, 1982). Stake and Trumbull (1982) define the relationship of naturalistic generalization to the intrinsic case study by comparing its use in intrinsic case study with that of formal research by saying:

Research typically aims to produce explicit, articulated, formal knowledge. The knowings which arise from experience are more "tacit," implicit, personalistic. These are self-generated knowings, naturalistic generalizations, that come when, individually, for each reader, each practitioner, new experience is added to old.

Formal research reports may contain the detailed description necessary to generate vicarious experience for readers, then allowing the development of naturalistic generalizations. But the formal research report does not usually have a commitment to provide this vicarious experience. Naturalistic research, as we conceive of it, is impelled by this commitment. The naturalistic researcher seeks to present selected raw data-portrayals of actual teaching and learning problems, witnessings of observers who understand the reality of the classroom, words of the people involved. These raw data provide the reader with vicarious experience which interacts with her existing naturalistic generalizations, formed previously from her particular experience. (Stake & Trumbull, 1982, p. 3)

In line with Stake's guidance regarding naturalistic observation and generalization, the data associated with this study were analyzed with regard to their ability to provide the reader with both vicarious experience and my assertions arising from the data.

In accordance with Stake's (1995) observations, data analysis associated with this study was ongoing (p. 71) from the HWB project's start until long after the project's research activities had been completed. Although data analysis was ongoing, the analysis was often of two different types: (a) direct interpretation, and (b) categorical aggregation (pp. 74-77). As leader-observer, I was in the unique position to analyze HWB data on an, almost, real time basis. Initial analyses performed while in the flow (Csikszentmihalyi, 1990) helped guide the direction of the project and, therefore, the subsequent collection of data. However, the depth of analysis provided the data while we were in the flow of the project was necessarily limited. Due to time limitations and competing demands on my time as project leader, doctoral student, employee, father, and husband, there was little time for the in depth analysis required for categorical aggregation. Therefore, as the HWB project was unfolding and I was in the role of project leader, virtually all analysis occurred took the form of direct interpretation. Deeper analyses, those depending on the careful review of the data and building aggregate understanding of the HWB project through multiple reinforcing events (categorical aggregation), were reserved for the year following the end of the HWB project.

While Stake (1995) is clear with regard to the goals and characteristics of the intrinsic case study and he provides guidelines concerning some of those characteristics, he leaves the method of analysis to the researcher. In his words:

...[T]here is much art and much intuitive processing to the search for meaning...Where thoughts come from, whence meaning, remains a mystery. The page does not write itself, but by finding, for analysis, the right ambiance, the right moment, by reading and rereading the accounts, by deep thinking, then understanding creeps forward and your page is printed. (Stake, 1995, pp. 72-73)



In search of a framework for analysis that lent itself to Stake's (1995) concept of creating naturalistic generalizations, I consulted a variety of authoritative publications (Lincoln & Guba, 1985; Merriam, 1988; Miles & Huberman, 1994; Yin, 1994; Strauss & Corbin, 1998). None presented a methodology of analysis that lent itself to Stake's (1995) concept of naturalistic generalization and, also, fit the epistemological and ontological beliefs as well as my experience. After some months searching for a solution, a match between analytical methodology and my experiences was found in the work of Moustakas (1990).

Moustakas built a career as a humanistic psychologist committed to emphasizing the human element of the researcher in heuristic research. In heuristic research, attempts of total objectivity are foresworn and the researcher's self becomes the primary means of interpreting the data. In the words of Moustakas (1990), "From the beginning and throughout the investigation, heuristic research involves self-search, self-dialogue, and self-discovery; the research question and the methodology flow out of the inner awareness, meaning, and inspiration" (p. 11). Moustakas's heuristic method agrees in spirit with Stake's description of the intrinsic case study (Stake, 1995, pp. 3-4), however, the two differ in the focus of the investigation and the degree to which the researcher shares that focus. To Moustakas (1990), the case and the researcher are inseparable with regard to the development of understanding. The researcher needs to spend at least as much time involved in indwelling, and self-dialogue as the researcher does investigating the phenomenon (pp. 15-26). In contrast, while Stake (1995) admits that the researcher is far from objective and the researcher's self impinges on the research (p. 45), the focus of the intrinsic case study must primarily be on developing an

understanding of the case under investigation (pp. 3-12). It was in Moustakas's (1990) description of the heuristic process, however, that I found a process of analysis that dovetailed with my experience. Consequently, the data analysis for this intrinsic case study is performed according to the seven-step process Moustakas outlined for heuristic research (pp. 27-37). According to Moustakas, the heuristic research process involves the following seven phases:

1. Initial engagement
2. Immersion
3. Incubation
4. Illumination
5. Explication
6. Creative synthesis
7. Validation

Following is a paraphrased description of each phase as drawn from Moustakas (1990) and a description of how that phase was operationalized in this study.

During initial engagement, the researcher comes to grips with his critical interests with regard to the study, engages with the data to discover intense personal interests, and defines as well as clarifies the research questions associated with the study (Moustakas, 1990, p. 27). The initial engagement phase of this study corresponds to the first six months of data collection. During that time, I collected and reviewed data associated with the study in an ongoing effort to document the phenomenon of a history expedition. As time went on, ongoing identification and assignment of meaning to a variety of incidents began to hone my interest in particular phenomena reported by the participants or observed by me. Much like Glaser's (1965) description of outcomes from

the constant comparative method, this phase, initial engagement, provided a venue for the clarification of research questions as early analyses of the data provided initial insights into the phenomenon.

During immersion, the researcher lives, eats, and breathes with the data and engages in intuitive pursuits with regard to the outcomes of initial analyses of the data (Moustakas, 1990, p. 28). The immersion phase corresponds to the second six months of this study. As the quantity of data begins to build throughout the initial engagement phase and into the immersion phase, the researcher's job becomes more complex. Areas that once held potential for the researcher fail to prove worthy of further exploration. Similarly, areas that held little promise suddenly loom large with potential. Finally, there are the items of interest that were never predicted, but which pop up in disconcerting fashion as anomalies find their way into the initial analyses and things that were taken for granted seem non-existent. It is in this phase that the study's research questions are narrowed or broadened to accommodate initial findings from the data. Interventions come as a result of the researcher's intuitive response to initial data analyses and data collection efforts are modified to more closely align with the direction the phenomenon is heading.

During the incubation period, the researcher focuses on other concerns, allowing the subconscious to work with the understanding gained through prior immersion in the data (Moustakas, 1990, p. 28). The incubation phase corresponded to the ten-month period following the official end of this study. During this period, the project team was completing its efforts. The HWB project final report was printed, team members met with various dignitaries at the state capital, and the legislature created an official day of

recognition for the regiment. However, these were isolated events. For the most part, the team dissolved and its members returned to their academic lives. As this I went about my job and completed the course work for my degree, my analysis of the data continued subconsciously. This phase was marked by writer's block. The harder I tried to work on summarizing the HWB experience, the less the words flowed. Clearly, no words could flow from my mind until the experience had settled in his subconscious. Further work was suspended until I was at ease with my understanding of the phenomenon.

The illumination phase involves the researcher gaining insight into the data and the research questions in almost a "Eureka!" sense (Moustakas, 1990, p. 29). The illumination phase closely paralleled my preparations for delivering a paper concerning the HWB project at a national conference. Major themes identified by the data analyses became the foundation for the paper. While the themes were identified and the data leading to their identification described, my understanding was not yet full blown. Constructive criticism from outside readers and conference attendees helped me come to terms with both the weaknesses and the strengths of my understanding of the phenomenon as well as his ability to describe that understanding.

The purpose of the explication phase is to come to terms and fully grasp the products of the illumination phase. A comprehensive understanding of the core issues is developed and the researcher brings together data that reflect the "essences" (Moustakas, 1990, p. 30) of the experience. Similar to Stake's (1995) description of naturalistic generalization, during the explication phase I married supporting data in the form of descriptive material (naturalistic observations) to the themes (propositional

generalizations) already identified in the study. This phase marked the beginning of the effort to complete Chapter 4 of this study.

In the creative synthesis phase, the researcher takes the major components and core themes identified in prior phases and weaves them into a creative synthesis of description regarding the experience (Moustakas, 1990, 31). The creative synthesis phase parallels my development of the final versions of Chapter 4 and 5 of this study. This phase deals with presenting the findings of the study as well as meaning as interpreted through the researcher. Whereas the participants have had their say in Chapter 4 of this study, it is in Chapter 5 that I interpreted the overall meaning of the study's results.

The final step of the process is validation. In this phase, the researcher works to ensure the validity of the creative synthesis the researcher has constructed. This can only be done by the researcher and involves member checking, and triangulation through multiple kinds of data, and multiple informants (Moustakas, 1990, 32). Whereas Moustakas identifies validation as the final phase of heuristic research, I conducted validation in parallel to the creative synthesis phase. As soon as I had identified the study's findings and married it to descriptive data, the findings were forwarded to project participants for their feedback concerning "accuracy and palatability" (Stake, 1995, p. 115). In addition, methodological triangulation (p. 114) involving varying data collection methods (e.g., interview, documents, media opportunities) was performed in support of developing core themes in the study.

### Summary

This chapter described the research design used in this study and its organization. It did

so through the presentation of the: (a) purpose and statement of the problem, (b) research questions that guided the study, (c) the research design, (d) researcher identity, (e) case selection and description of the setting, (f) characteristics of the participants, (g) procedures used to collect data, and (h) the method of data analysis. Through this intrinsic case study, the characteristics of a unique educational event were captured, as were the experiences of its six teenage participants and the project's audience. The primary research question of this study is: How do participants and audience describe the history expedition experience? The research question was pursued following the qualitative research paradigm and employing the methodology of the intrinsic case study as explicated by Stake (1995). The investigation was set in North Central Texas and it engaged me as leader-observer. An extracurricular, out-of-school, history expedition was created for use in this study with teenage volunteers (n=6) as its participants. Data collected as a part of this study included interviews, questionnaires, and artifacts of participant activities in the form of documents, photographs, and audio recordings. Data were gathered from the teenage participants, their parents, and the wider audience of the project. Analysis of the data was according to the seven-step process outlined for heuristic research (Moustakas, 1990) as modified for use with Stakes's (1995) description of the intrinsic case study.

## CHAPTER 4

### FINDINGS

#### Introduction

Chapter 4 presents the major findings of this study based on data collected with regard to the four research questions pursued by this investigator:

1. How do participants and audience describe the history expedition experience?
2. How does a community-based, extracurricular history expedition enable teenagers to engage in the practice of history?
3. In what ways does an out-of-school history expedition lead to outcomes similar to those the National Education Association (NEA) (1893) associated with the intensive study of learning?
4. What is the relationship between the lived experience of a community-based history expedition and Lave and Wenger's (1991) theory of peripheral participation within a community of practice?

This study's findings are presented in the chronological and conceptual order in which they occurred, an approach important in an intrinsic case study, as opposed to the topical order enforced by strict adherence to the research questions. An important rationale for this decision is that if the expedition participants' ability to practice history was transformed over time such a change might be more readily reflected in a chronologically rather than topically ordered narrative. By presenting findings in a chronological order, important contextual information necessary to understanding the evolving nature of the case is maintained.

The findings are drawn from a variety of data sources. These sources include participant interviews, transcripts of recorded working sessions, my observations as recorded in his journal, documents created by the participants in both draft and final form, project records, photographs, video files, artifacts, and comments from the project

audience. Dialog presented in the findings which is reconstructed from notes in my research journal is a paraphrased version of an actual conversation not captured on tape. Dialog resulting from audio tapes was processed according to the Oral History Evaluation Guidelines (Oral History Association, 2000). In general, transcripts are an accurate reflection of the dialog which occurred with two exceptions. The first exception is when the verbatim transcription of a person's spoken language detracts from that person's message. Examples of this are false starts, word crutches, nervous verbal habits, speech impediments, or an overly disjointed dialog. The second exception is when my neutral responses to a speaker's words, meant to exhibit active listening and stimulate further reflection by the speaker, artificially obstruct the flow of the speaker's thoughts and detract from understanding in transcript form. Examples of such responses on my part are: um-humh, okay, yes, go on, or repeating the last thought the speaker uttered before they stopped speaking. In each of these cases, the written word of the transcript is an edited version of the original conversation. The editorial changes are meant to ease communication between speaker and reader by clarifying the intent and meaning of the speaker's words.

Stake's (1995) description of case study data presentation and analysis advises that there may be cause for handling data through either categorical aggregation or direct interpretation. In addition, especially in regard to intrinsic case studies, there should be an emphasis placed on providing "vicarious experiences [*italicized in the original*] for the reader, to give them a sense of 'being there'..." (p. 63). According to Stake, by providing these vicarious experiences, the author hopes to increase understanding of the context within which the various narratives and vignettes related in



the case study occurred. Consequently, the following findings follow no prescribed format uniform across the chapter. Instead, they are presented in the form best thought to enhance the understanding of the reader of the information presented in the chapter. These take the form of narrative summaries punctuated by short quotes, extended dialog meant to portray process, extended narrative involving thick description, block quotes of extended statements made by participants, as well as tabular data.

### The Kickoff Meeting

The History Without Borders (HWB) project officially began on Sunday August 22, 2004, with a meeting of the participants, their parents, and me. As the HWB project leader and the principal investigator of this intrinsic case study, I felt it was important to meet with the participants and their parents in order to provide an overview of the history project. In addition, I wanted to ensure the parents understood my interest in conducting the HWB project at the same time that I conducted an intrinsic case study involving their child. Since the designated work area for the HWB project, in which the participants would be spending many hours, was located on the second floor of my home in the family room, and, since during those many hours participants would fall under my authority, I chose to hold the kickoff meeting at my house. As a parent of a participant, I knew the information I would have wanted to know had my son joined a project led by someone else and taking place in someone else's home. For me, questions concerning the project's content would have been subordinated to questions concerning the safety and well-being of my son. Consequently, I wanted not only to describe the project, but also to allay any fears felt by another parent or their participant child. The kickoff meeting was the opportunity for others to take my measure and for me

to convince them that placing their child under my authority was a reasonable and justified decision.

The weather on the day of the kickoff meeting was miserable. Hot and humid, televisions beeped with severe weather warnings as thunderstorms rolled through the area; a phenomenon common to that time of year in North Central Texas. As miserable as it was outside, it was amazingly comfortable inside our house where the meeting was being held. The air conditioners hummed continuously as they cooled our home and removed the humidity from the air. Refreshments were set out in the kitchen and in the adjoining first floor living room, where the meeting would soon start, was seating for the 12 people who had replied to my invitation.

As the participants, each with a single parent, began to arrive, they mingled in the kitchen area and helped themselves to cold drinks and some light snacks. To my surprise, little time was spent on introductions since the other attendees knew one another through their child's involvement in the high school marching band. I, on the other hand, was at a disadvantage. Being a newcomer to the town, with the exception of my son, Mike, I had no knowledge concerning the other participants or their parents. Immediately, I was on the defensive, realizing that I was the new kid on the block trying to sell a product to the old-timers. As the old adage said, I would have but one chance to make a good impression.

I started the meeting on time and introduced myself:

Hi, I'm Mike's dad and I'll be leading an expedition into the past; an expedition known as History Without Borders. I'm looking for volunteers who have the courage, tenacity, and insatiable curiosity to join me on that journey. As we take this journey, we will go back through time to a Texas none of us knows. We will go back to a Texas beset by the Great Depression, then a Texas in fear of invasion from its border with Mexico, and, finally, a Texas which sent its young

men to fight, and many to die, in little known places with unfamiliar names in the Pacific. We will become familiar with the sights, sounds, smells, and feel of a culture alien to our current existence. We will learn about the values and beliefs of a different time and learn to see the past through the eyes of its former residents. We will come to terms with the emotions, ghosts, and thoughts of young men exposed to the camaraderie of military life as well as its boredom and horrors. Finally, safe in our 21<sup>st</sup> century abodes, we will describe what we have learned to those around us. In short, for a period of one year, each of this expedition's members will be a practicing historian. At the end of that year, we will write a book about what we have learned. It will be the first book ever written about the experiences of the last horse mounted cavalry regiment sent overseas in World War II, the 112<sup>th</sup> Cavalry of the Texas National Guard.

I related to the attendees my personal journey of discovery with regard to the 112<sup>th</sup> Cavalry, a journey which was far from complete and a journey that began by accident. I told them of the day I was traveling through Mineral Wells, Texas, and noticed a monument at the intersection of 1<sup>st</sup> Street and 5<sup>th</sup> Avenue dedicated to the 124<sup>th</sup> Cavalry, Texas National Guard, a regiment who served in the China-Burma-India theater of operations during World War II. I related my thoughts at the time: "What must it have been like to grow up in rural Texas during the Depression, join the horse cavalry, and end up fighting in the jungles of Burma?" I then explained how the availability of sources often rules investigations in history and how my initial attempts to find veterans of that regiment proved futile. Instead, I was guided by knowledgeable historians to the sister regiment of the 124<sup>th</sup> Cavalry, the 112<sup>th</sup> Cavalry, Texas National Guard. The 112<sup>th</sup> Cavalry had an active veterans organization, many of its artifacts were in the collection of the state military museum, and although documentation concerning the 112<sup>th</sup>'s activities existed at the local, state, and national levels, there had never been a book written which spanned their activities in the U.S. and the Pacific Theater during the war. The fact that it was the last U.S. Army cavalry regiment with a mounted wartime mission overseas made it historically significant.

Continuing the narration of my personal journey, I told them how, in the last two years, I had conducted 16 interviews of 112<sup>th</sup> veterans. Their oral histories were located at a nearby university, along with the complete collection of official military histories from World War II. In addition, I had made several trips to Washington, D.C., Austin, Texas, and College Station, Texas. During those trips, I had collected copies of over 2000 pages of primary source documents regarding the 112<sup>th</sup> Cavalry. Consequently, there existed a historically significant topic and a gap in the literature regarding that topic. So, there was a need for historical investigation. Within an hour's drive, one could gain access to collections containing over 5000 pages of unexploited documents related to the subject. Within a day's drive, one could access over 75 veterans of the 112<sup>th</sup> Cavalry from World War II, several personal and public collections of artifacts from the 112<sup>th</sup> Cavalry, as well as the National Museum of the Pacific War. Clearly, within our region there was an abundant supply of sources for anyone interested in investigating the 112<sup>th</sup> Cavalry. Given the need for a study and the resources for the study, all that was missing was an individual, or a group of individuals, who were committed to undertaking and completing the study. "Here, today, are the people who can make this happen," I said. "Some believe that it is beyond the grasp of teenagers to really do history. I believe you can prove them wrong. I believe you can make history by doing history."

I reviewed the HWB project for the attendees ensuring I covered all of its key aspects: the project's objectives, timeline, major activities, as well as the necessity for participants to honor their commitment of 250 hours of project related community service during its first year. I assured the teenagers that while their experience would

certainly be challenging, it would also be fun and rewarding:

I want you to remember the focus of this project. Our focus is the completion of a unit history of the 112<sup>th</sup> Cavalry during World War II. We are not here to evaluate your ability to do history. Instead, this is a team effort and we will sink or swim as a team. We are going to do something that is rarely done. We are going to engage in collaborative history. Unlike school in which you receive an individual grade and you compete not only against others, but, also, yourself, this project will be pursued as a team effort. Our only measure of success is how successful we are at writing our book. No one will say that Mike, or Sierra, or Juliet, or Victor was excellent. Instead, they will comment on how successful the 112<sup>th</sup> Cavalry project was, or was not. The real measure is not whether each of you can do the job of a professional historian. Instead, the measure is whether the seven of us can do the job of a single historian. So, don't worry about whether you are up to the task or not. Instead, the question I want you to ask yourself is: Are we as a team up to the task? While you are asking yourself that question, I also want you to ask yourself the following questions. Do I have fun with the rest of the teenagers at this meeting today? Am I interested in going on road trips as part of the research effort? Would it be fun to spend a couple of overnights with this crew as part of the expedition? Do I like going to hamburger joints, ice cream parlors, and barbecue pits--especially when it's paid for by the expedition leader? And, finally, am I willing to work harder than I ever have in order to do something that has never been done? Since all of you are teenagers, I bet the answer is yes to all of those questions. All I can promise you is that we are going to work hard and have a lot of fun. Hard fun. That's what this will be all about.

Then, I explained that much of the work would take place in our house and took the attendees on a tour of those parts of the house involved in the project. As the tour progressed, I covered the rules of conduct I expected as part of the project and the fact that there would always be at least two adults in the house when project-related activities were taking place. Parents were invited to drop by and observe those activities whenever they saw fit. At the end of the tour, we returned to the first floor and our seats.

Next, I offered my views concerning what I felt the participants would get out of the project. I reminded the attendees that no participant would receive school credit in the form of an academic grade as a result of participating in the HWB project. I made clear the fact that while little could be gained from a material perspective as a result of participation; much could be gained with regard to intangible rewards. If the project were

able to come to full fruition: (a) community members who had not yet been recognized for their unique service during World War II would finally receive recognition, (b) the Texas National Guard would finally have its first history of the regiment's actions during World War II, and (c) due to the unique character of the HWB project in which they participated, the community service hours they accrued, and the potential to be a co-author of a monograph, participants would be well positioned when it came time to apply to college.

At this juncture, I distributed a manila folder to each of the attendees. The folder contained a copy of the recruiting document I had used to initially draw attention to the project (see Appendix A), the consent form for signature by parents of minors (see Appendix B), and the assent form for signature by the participant (see Appendix C). I reviewed each document with the attendees, explained why they were a necessary part of human subject research, and emphasized the fact that any participant could drop out of the project at any time without penalty. I informed everyone they had up to 10 days to review the forms and decide whether they were ready to commit to the project. By midnight of the tenth day after our meeting, I had to receive executed copies of the consent and assent forms from those who wished to participate. I had completed the portion of the meeting dealing with the HWB project and I asked if there were any questions. Everyone was clear with regard to the project and several commented that the meeting had answered whatever questions they had when they walked in the door. There were no questions.

After a quick break during which individuals cared for their needs, the second portion of the orientation took place. I sent the teenagers up to the second floor family

room, now the project workroom, and had them watch the beginning of the motion picture *She Wore a Yellow Ribbon* (Cooper, Farrell, & Ford, 1949) starring John Wayne. Set in the American Southwest in 1876, the movie portrays the activities of a cavalry unit stationed in a lonely outpost at the beginning of a war between the U.S. and several Native American nations. I asked the teenagers to take notes concerning what they felt cavalry life was like during that period. While the teenagers were engaged in that activity, I met with their parents in our first floor living room.

During this second portion of the orientation, I informed the parents that while I was the expedition leader of the HWB project, I was also the principal investigator of an intrinsic case study focused on observing how their children engaged in the practice of history while part of the HWB project. I explained the purpose of an intrinsic case study, the tools I would use, the types of data analysis I would employ, and the university's interest in pursuing such educational research. As I looked around the room, I realized I had said something that changed the dynamics in the room. The parents began to relax, smiles became more prevalent, and, metaphorically, everyone seemed to sigh with relief. When I asked if there were any questions, I received comments instead. Juliet's mom said: "Now I understand! I couldn't figure out why you would take on all the responsibility of working with teenagers when you could have done it yourself. Now I know why the teenagers are involved." She seemed happy that she finally understood my motivation, that of a grown man, to surround himself with teenagers. Others smiled and added their agreement. Until now, the parents were unsure why a community member would form and lead such an activity. While all agreed the HWB project was a wonderful opportunity for the teenagers and that it was commendable in its objectives,

individually each admitted some nagging concerns about my fundamental motivations. As soon as they learned of the intrinsic case study aspects of the HWB project, they felt they understood that my motivations were honorable and their trust not misplaced. Sierra's parents revealed that each of them had been associated with the military. "Glenn, we wanted you to know that both of us served in the military. We think this is a great project and we hope Sierra will get a lot out of it. Maybe, after this project, we will be better able to talk to her about our experiences and maybe she will better understand what our military is doing overseas." Victor's dad commented: "You know, Victor is interested in becoming a veterinarian. Anything this project can do to advance that goal would certainly be appreciated." Juliet's mother reflected on the fact that Juliet's grandfather had served in World War II and that the family knew little of those experiences. In her view, "To the extent Juliet's involvement in this project leads us to better understand her of granddad's time in the war, it will be a positive outcome. " She added, "Thank you for doing this. We think it is a great opportunity and we hope Juliet is able to keep with the project in light of her heavy load of schoolwork and outside activities." I assured her that I did not think that would become a problem.

As the meeting ended, I recalled the teenagers from their motion picture task and collected their notes. Reunited with their parents, the teenagers began to talk of activities they had scheduled later in the day and the need to depart as soon as possible. Bringing their manila folders with them, the teenagers and their parents slowly drifted toward the door amidst the background noise of conversations, farewells, and the departing jests so common to small groups familiar with one another. Although the weather had provided an ominous undertone to the beginning of the day's activities, the



meeting had been a success. Within three days, each of the six teenagers had returned their executed paperwork. The HWB project was officially underway, populated by six teenage volunteers and supported by a loose collaborative of community organizations. Also underway was this intrinsic case study of the HWB project, approved by my university's institutional review board, populated by the same six teenagers as the HWB project, and enabled by the signed documents of consent and assent required for human subject research.

### *Watching a Movie as Research*

During the kickoff meeting I had the teenagers watch part of the motion picture *She Wore A Yellow Ribbon* (Cooper, Farrell, & Ford, 1949). I told them to take notes, especially with regard to the following items: the cavalry insignia, the colors of the cavalry flag (guidon), on what part of their uniform officers wore their rank, the color of the inside of the officers' capes, what weapons were used by the cavalry, how lieutenants were treated, in what way were barracks heated, where the bugler rode when on patrol, whether cavalymen always rode their horses on patrol, how the cavalry gathered their information, and how they fought. I felt the acquisition of each of these items of information would immediately allow the teenagers to better understand the military. For example, the Army has many branches and each has its own insignia and colors. While officers are privileged above enlisted personnel, junior officers are often treated with less respect than more senior officers. Mounted cavalry used a variety of weapons and fought not from horseback, but from a dismounted position. Finally, some things never change. Between the experiences of the post-Civil War cavalry on America's Great Plains, and post-Depression cavalry in the Texas National Guard, little

had changed. For example, barracks were still heated by wood stoves; cavalrymen still used their horses for transport and fought dismounted; junior officers were still the butt of many jokes; the cavalry insignia was still crossed sabers; its guidons red and white, and its branch color yellow. Whether the teenagers would come to this same understanding from watching the movie was less clear. Their responses to my task would tell the tale.

All of the participants returned responses which were in agreement on many of the items of information requiring simple observation. Regarding the cavalry insignia, responses ranged from Delta's "two swords crossing," Charlee's "two crossed swords," or Sierra's "two swords in an 'X'," to Mike's "crossed sabers" and Juliet's "sabers." Similarly, all of the participants correctly identified the colors of the cavalry guidon as red and white and the color of the cavalry branch, as exhibited in the interior of the officers' capes, as yellow. All of the teenagers observed that barracks were heated by wood stoves; weapons included rifles, pistols, and sabers; buglers rode with the cavalryman in charge; and that the cavalrymen dismounted when they fought. With regard to the treatment of junior officers, all correctly interpreted the fact that the junior officers were sometimes treated as if they were immature or fools. By the time many of the men who made up the 112<sup>th</sup> Cavalry during World War II joined the regiment in 1940, little had changed.

Participant observations began to vary when the task diverged from simple observation. For example, in order to respond when asked where officers wore their rank, participants required prior knowledge of what an officer was as opposed to a non-officer (enlisted man). Given that prior knowledge, the task was then one of simple

observation. In the absence of that knowledge, the task would be far more difficult. Of the six teenagers, only two, Mike and Charlee, correctly answered the question. The others incorrectly responded that officers wore their rank on their sleeves when, in fact, only enlisted men wore their rank on their sleeves in the movie. It should be realized that the two who correctly responded were familiar with the Army. Mike was both an avid follower of military history and the son of a former Army officer, while Charlee's dream was to attend the United States Military Academy at West Point, New York, and had studied the Army more than others.

Responses were most divergent when participants were asked to observe and then interpret what they had observed. All of the participants correctly responded that the character John Wayne played in the movie, Nathan Brittles, was a cavalry captain. This was a simple act of observation since throughout the movie John Wayne's character is referred to as "Captain Nathan Brittles" (Cooper, Farrell, & Ford, 1949). However, the teenagers' responses were quite varied when asked to describe his job. Nowhere in the movie is a job description provided for Captain Nathan Brittles. In order to provide a response, participants had to observe and then interpret their observations. Delta responded poetically by saying Nathan Brittles' job was to "to wield the sword of destiny." Charlee did not respond. Mike made no distinction between Captain Nathan Brittles and the rest of the unit. His simple answer was that Captain Brittles' job was to be a "cavalryman." Victor responded that his job was to "hold down" the fort. Sierra responded that his job was to "lead his troop" and to "supervise inferiors." Further conversation allowed Sierra to explain she only used the word inferior since she could not remember the word subordinate. Juliet said that his job had to do with "Indian

relations” as a result of “American expansion” and running a “fort on the frontier.” Disregarding Charlee’s lack of response, none of the observations was incorrect. Yet, none of the answers provided was wholly correct as well. Each participant provided but only a partial description of what Captain Nathan Brittles’ job entailed. From that perspective, each of the participants provided a response which was lacking in its descriptive power. If, however, one uses the team’s collective understanding of Nathan Brittle’s job as the basis for description, the result is both correct and robust. The team’s collective understanding was that Captain Nathan Brittles was a cavalryman who had to lead his troop, supervise subordinates, hold down the fort, manage relations with Indians as a result of American expansionism, and, in short, wield the sword of destiny on behalf of the U.S. Army in a far-off portion of the American West. Translated into terms more apropos to a human resources job description, the team correctly identified that, as a troop commander, a cavalry captain’s job involves leadership of the unit, supervision of subordinates, maintenance and defense of his post, concern for community relations, and implementation of the policies of the Army and the U.S. Government.

#### Field Trip to the National Museum of the Pacific War

On September 4, 2004, members of the history expedition traveled to Fredericksburg, Texas, in order to attend a living history performance sponsored by the National Museum of the Pacific War. Entitled Island Assault, the performance recreated an assault on an enemy position as might have been seen in the Pacific Theater during World War II. The experience is described on the museum’s Web page:

Visitors can follow authentically dressed and equipped World War II Marines on a tour of a re-created Pacific War battlefield and experience an exciting combined

arms attack on a Japanese pillbox. In the attack, volunteers use the only operational World War II flamethrower in Texas. Flamethrowers were a key weapon in infantry tactics during World War II in the Pacific. Other famous vehicles and weapons of World War II that are featured include a Stuart tank, half-track, M1903 Springfield rifle, M1 Garand rifle, M1918A2 Browning automatic rifle, M1919A4 .30-caliber machine gun, Japanese Nambu machine gun, and Japanese-type 38 rifle (also known as the Arisaka). (National Museum of the Pacific War, 2007).

Other than the specific Marine Corps uniforms the reenactors were wearing, everything the teenagers would see, hear, touch, smell, and feel had been a part of the 112<sup>th</sup> Cavalry's experience in World War II.

The rationale for the field trip was to immerse the teenagers in an environment as close to that of the study period as possible. As expedition leader, I felt such an experience would allow my co-researchers the ability to safely explore a sensory terrain alien to their prior experience, a terrain consisting of the sights, sounds, smells, and feel of a modern battlefield. In my journal I wrote:

I don't want the project to become a simple cognitive effort in which the teenagers cut-and-paste a bunch of sources together into a final report. Instead, I want to increase their level of understanding about the time in which these men lived. I want the expedition to explore the terrain of combat in both a cognitive and affective way. If the expedition members encounter the different sounds of the battlefield, smell the cordite and burnt fuel, feel the heat from flamethrowers, taste the acrid flavors of battle polluted air, and feel the shock waves from cannons and explosions roll across their bodies while simultaneously sensing the anarchy of the moment, they will never forget the experience. Even if the experience was only a reenactment, expedition members can look a veteran in the eye as he describes the Battle of the Driniumor River and listen with some sense of understanding. With regard to this expedition, I want the kids to not only see but also to comprehend, to not only learn but also to understand, to not only think but also to feel.

I believed the Island Assault living history demonstration could provide a multi-sensory learning experience in a safe, controlled, educational environment. The experience could help orient expedition participants to the period and improve their understanding of many phenomena associated with combat.

Preparations for the trip began months earlier when I had visited the museum and attended the reenactment. I was impressed by the program and thought it was the most authentic orientation I had attended outside of my own military training. Consequently, I wanted it to be the first field trip the expedition made. I knew there would be months of reading and hard work ahead of us and wanted the expedition's teenage participants engaged in something exciting and fun, right up front. During the expedition kickoff meeting in August, I had informed parents and teenagers alike about the field trip. I specifically addressed the issue that the project and its field trips were not about glorifying war. Instead, the objective was to allow expedition members to better understand the experiences of a select group of Texas teenagers as they engaged in their own journey more than 60 years earlier. One week prior to the event, I telephoned each of the participants in order to provide greater detail concerning the impending field trip and to ask the teenagers to remind their parents of the event. All of the teenagers said they would be able to attend and that they were looking forward to the trip. Two days prior to the trip, I e-mailed each of the teenagers an overview of the field trip in which I specifically outlined that departure from my house was at 5:00 a.m. and we would return to my house at 10:00 p.m., transport was by van, and that they would need money for food. Included was the rationale for the trip:

The purpose of this one-day expedition is to acquaint you with portions of the environment within which the 112<sup>th</sup> Cavalry existed. Portions of this environment include: unit organization, rank structure, weapons and equipment, tactics, and their psychological impact on our soldiers in the Pacific Theater during World War II.

I listed the objectives I had for the trip so that the teenagers would be aware of what I specifically wanted them to learn. By the end of the day each participant will have:

1) Seen examples of the following weapons in action:

Rifle (Springfield)	M1903	.30-caliber
Rifle (Garand)	M1	.30-caliber
Carbine	M1	.30-caliber
Browning Automatic Rifle (BAR)	M1918A2	.30-caliber
Machine gun (Aircooled or Light)	M1919	.30-caliber
Machine gun (Watercooled)	M1917A1	.30-caliber
Submachine gun (Grease gun)	M3	.45-caliber
Submachine gun (Thompson)	M1	.45-caliber
Pistol	M1911A1	.45-caliber
Machine gun (The "50")	M2	.50-caliber
Flame Thrower	M1A1 or	M2A2

- 2) experienced the sound and sight of aimed and automatic weapons fire;
- 3) been taught the relationship between metric and English units of caliber;
- 4) observed the relationship of equipment to the tactical environment;
- 5) learned the strengths and weaknesses of the above weapons;
- 6) toured the Museum of the Pacific War; and
- 7) recorded their reflections and observations.

I requested each participant provide the following information before we departed on our trip: name, home address, home phone, emergency contact phone, health insurance carrier, policy or group number, social security number, allergies, blood type (if known), and whether I should be aware of any emergency procedures for an existing condition. Finally, I asked the parents to sign the document acknowledging their understanding that in the event of a medical emergency I would take whatever steps I believed necessary to ensure the safety and well-being of their child, to include such procedures

as first aid, contacting emergency services, to include emergency room services. Time and child well being permitting, I would attempt to call the emergency contact number supplied me before committing to any emergency action.

On the morning of the field trip, teenagers began showing up to my house at 4:45 a.m. in the pre-dawn darkness. As is so often the case, the early morning hour led to hushed greetings and muffled noises as the teenagers got into the van. Exactly at 5:00 a.m., we departed our house and began our road trip, a trip that was greater than 250 miles in each direction. The teenagers quietly spoke to one another in hushed tones for the first 30 miles of the trip; however, soon all was silent as the teenagers drifted off to asleep. As the sun began to rise over the horizon, we realized we were ready for breakfast. After the stop, the teenagers regained much of their energy and since we were still several hours away from our destination, were looking for things to do. As we returned to the van, I provided each of the participants with a copy of Ernest Kelley's oral history (annotation at Appendix D). In addition, I provided each of them four highlighters of different colors: pink, orange, yellow, and blue, as well as written directions concerning how the highlighters should be used when reading the oral histories of the men from the 112<sup>th</sup>. I said:

I expect you to start reading this 203-page interview as soon as possible; we will be discussing it at our next meeting later in the month. Before you start to read the oral history, read my directions concerning how you should highlight it. When you highlight, use the different markers I've given you.

I'll warn you that we still have a couple of hours to go until we reach the museum, so, I suggest you use your time wisely. If you want to start reading the oral history, feel free to do so. If you would prefer not to read, feel free to relax and listen to the music I'll be playing from the 1930s and 1940s. If the only thing you want to do is chill, then feel free to chill. Just don't do anything to bother anyone else who wants to read or listen to the music.

One of the things you will learn about this project is that there are times we are on duty and there are times we are off duty. From now until we leave the



museum grounds, we are on duty. As soon as we leave to come home, you will be off duty. So, save your energy and fooling around until we are heading home.

The teenagers responded with good-natured groans and boos but got in the van and were quiet as we got back on the highway.

### *Music as a Means of Stimulating Thought*

Once on the highway, I started playing music that I knew had been mentioned by the 112<sup>th</sup> veterans in their oral histories. Music from the Depression and World War II by performers like Glenn Miller, Ernest Tubbs, Woodrow “Woody” Guthrie, Horace Heidt, the Prairie Ramblers, the Andrews Sisters, the Sons of the Pioneers, and the Light Crust Doughboys. Soon, my van full of high school band members began to comment on the songs. The music began to work its magic. Mike described to Delta and Charlee the Depression-era meaning of the lyrics in the song Big Rock Candy Mountain, as sung by Harry McClintock:

I heard this song in the movie *O Brother, Where Art Thou*. During the Depression, there were guys out of work all over the country. A lot of them traveled around looking for work, going from town to town. They lived their life on the move and were called hoboes. Anyway, this song is about their idea of heaven. The reason they wanted the cops to have wooden legs is so that they wouldn't be chased and arrested by the police. The bulldogs the police used would all have rubber teeth so they wouldn't get bitten. The farmer's trees would be full of fruit so they could eat, and the barns full of hay so they could sleep in a dry barn every night. The lake of stew and whiskey too? That's pretty self evident.

I loved it because it was a fine example of peer teaching. The teenagers had questions about the meaning of lyrics in other songs as well. One song was *I'll Be Back In A Year (Little Darlin')* (Hull, 1941) as sung by the Prairie Ramblers. Victor asked:

If we didn't get into World War II until almost 1942, why are they singing that they are in the Army in January 1941? What does: "I'll be back in a year little darlin', Uncle Sam has called and I must go..." mean in 1941? Am I missing something here? What's going on?

As I explained how the National Guard was called into federal service in 1940, the teenagers were astounded. Victor said, "So, months before Pearl Harbor we were already building our Army? I thought Pearl Harbor caught us flatfooted!" As the questions continued to arise, it became clear to me that the music was having unintended educational consequences. I had started playing it solely to orient the teenagers to the music of another period. However, in addition to fulfilling that objective, the exercise was also leading the teenagers to think about the lyrics and to ask questions about the period.

#### *Determination of Prior Subject Knowledge*

We arrived in Fredericksburg around 11:00 a.m. and purchased tickets to the museum and the 2:30 p.m. living history demonstration. After lunch, we went over to the museum and found a shaded area to sit in. There, I arranged a schedule by which the teenagers would eat and visit the museum on a rotating basis. The reason for the rotation was that I planned to talk with each participant concerning their knowledge of World War II prior to their touring the museum and attending the living history demonstration. My intention was to gain a feel for how much the participants knew about the topic before they embarked on the project. This was important for two reasons. First, I wanted to assess their background knowledge so that I could better prepare our future learning experiences. Second, the particular questions I was interested in dealt with contextual knowledge important to presenting the story of the 112<sup>th</sup> Cavalry. To the extent the teenagers came to the expedition knowing background material, or learned it during the expedition, they would be able to contextualize their final product. Nothing they would have read in the early portions of Ernest Kelley's oral

history or what they gained from our conversation in the van that day would have provided information to answer the questions (see Appendix K) I was going to ask them.

As was expected, my interviews with the teenage participants revealed they possessed only a superficial knowledge of World War II and knew virtually nothing about operations in the Pacific Theater during that war (see Appendix O). The expedition team exhibited distributed knowledge with regard to the causes of World War II in Europe and distributed confirmatory knowledge with regard to the immediate cause of the war in the Pacific. Participant knowledge of most other areas of the 112<sup>th</sup> Cavalry's experience in World War II was minimal to non-existent except for Mike's knowledge of weapons and the team's cursory knowledge of Army ranks. The interviews I held with the teenagers confirmed my suppositions that the expedition's participants would need to learn not only about the 112<sup>th</sup> Cavalry, but also about the context of the war in which the regiment fought.

#### *Living History as a Research Source*

Promptly at 2:15 p.m., the teenagers from our group gathered at the front of the museum. Once everyone was present, we began our walk toward the demonstration area several blocks away. The weather was hot and humid and a light drizzle fell as we continued our walk. By the time we arrived at the entry to the demonstration area, a combination of heat, humidity, and drizzle caused our clothes to stick to our skin. We entered along a path which wound down a slight hill toward a flat plain. As we walked along the path, we passed several buildings which belonged to the museum and were used to house exhibits regarding medical services in World War II, patrol torpedo boats, and aircraft carrier operations. The path wound through an area resembling an invasion

beach in which relics of the war in the form of amphibious vehicles and artillery were located. With a few minutes to spare, we arrived at the demonstration facility. The following details of the event are excerpted from my journal. In the following narrative, I identify the reenactors by the roles they are playing, not their actual role as living historians.

We sit on bleachers under a corrugated metal roof. Although protected from the drizzle, we endure the heat and humidity that wraps around us like an uncomfortable blanket. Talk about realism, Delta says, 'I feel like I'm in the jungle already!' There are seats for about 100 people around us and they are rapidly filling up. Families, couples, individuals, toddlers, the elderly, middle aged, these are the spectators for the event. Noticeably absent are African-American spectators and noticeably present are several elderly Asian men and women led by a tour guide. Teenagers are spread throughout the audience, and the six teenagers from our expedition split into pairs as they find seats in the audience. Suspended waist high, a thick rope delineates the bleacher area from the "battlefield" used by the reenactors.

As we look directly to our front, we see the "battlefield." It is a flat grassy area that begins just beyond the rope to our front and rises to form a low ridge about 25 yards out. It is lightly vegetated with a few trees. As we look to our left, we see the buildings we walked past which house various displays as well as the trail we walked down to enter this area. Mid-way between our seats and the exhibit buildings is the landing beach exhibit with its log and sandbag bunkers. Amidst that exhibit, about 20 yards to our left, sits a 37mm antitank gun aimed parallel to our front. Squat and low to the ground it looks like a toy compared to other pieces of artillery we have seen today. Looking to our right front, along the forward slope of the ridge, is a dirty concrete bunker whose firing ports extend above ground. To our extreme right, the grassy field turns into a dirt driveway that leads into a public road. From behind a grove of trees out by the public road, I hear the sounds of hidden equipment. The distinct sound of a heavy engine and the unmistakable squeals as sprocket drives engage a steel tread tell me there is a bulldozer or a tank over there. Other engines join the chorus as vehicles maneuver into position outside our field of vision.

Tension builds in the stands as the demonstration time nears. As I look at them, I realize my expedition co-researchers are getting excited. As the starting time approaches their toes began to tap the ground and they get their cameras ready. Beads of sweat form on our brows as the dead calm of a tropical afternoon blocks all efforts by the breeze to cool us down. By now, the stands are nearly filled. A bucket containing foam earplugs is passed from hand to hand throughout the audience. I'm pleased as I see each of the expedition members take a pair, fiddle with them, and insert them into their ears. Earlier, I spotted a man in the audience wearing a baseball cap which identified him as a Marine Corps veteran

from World War II. Seated in front of Charlee and Delta, he turns to them and says, 'Young ladies, do you see that cannon over there?' He points to the 37mm antitank gun about 50 feet away. 'I'm going to give you some advice. These earplugs will do fine against the noise made by most of the pop guns here today, but they won't be worth a plugged nickel when that there cannon gets to firin'. So, when y'all see some grunts messin' with that thang, I suggest you cover your ears and open your mouth. They say that openin' your mouth will keep you from rupturing your eardrums. I reckon it works because I did it throughout that war and never ruptured an eardrum.' With that, he nods at them and turns back to face the demonstration area once again. Charlee and Delta giggle. Suddenly, in one of those unorchestrated events in public settings, it inexplicably becomes silent. It is as if everyone has taken a breath at the same time. There is simply an audio vacuum where just seconds before there existed a cacophony of sounds. Now there is nothing, well, almost nothing. From my right rear, I hear someone walking. It is the distinctive sound of measured footsteps executed with great purpose and the precision of a metronome. It is the sound of a military stride. It is our signal that the demonstration is about to begin.

With well-honed precision, a uniformed Marine marches into the demonstration area, executes a sharp left flank turn and, after a few steps, comes to a halt at our front and center. Silently, and with great precision, he executes a left face maneuver and ends up facing directly toward us. He stands at attention, every inch of him the replica of a seasoned Marine from the Pacific Theater of World War II. He wears the olive drab, herringbone pattern utility uniform of the U.S.M.C. from World War II. Leggings cover his combat boots, a pistol belt is fastened around his waist, and attached to the pistol belt are a canteen, a first aid pouch, and several ammunition pouches. Slung on his shoulder is the Marine Corp's venerable M1 Garand rifle; on his head, he wears a helmet with a camouflage cover. He announces: "Welcome to the National Museum of the Pacific War and our living history demonstration Island Assault. During this demonstration you will see, hear, feel, and smell what it might have been like to be a Marine attacking an enemy position in the Pacific Theater during World War II. Although the men you will see are living historians, the uniforms, equipment, weapons, and tactics you will see are entirely authentic. And, for those of you lucky enough to be part of today's event, we have even gone so far as to provide you authentic weather. Welcome to the Pacific war!" At this point the Marine relaxes and takes on the manner of a platoon sergeant briefing his troops.

Now, a note on safety. Although we are using blank ammunition, the weapons you are about to see are still dangerous. We must request that you stay behind the rope separating your viewing area from our battlefield. At no time will anyone be allowed onto this field during the demonstration. After the demonstration is over, we will lower the rope in order to allow you the opportunity to speak with the Marine and Japanese Army reenactors, examine their weapons and equipment close up, and ask any questions you want. We really mean it when we say, 'There's no such thing as a stupid question.' While you are on this field, please do not touch anything on the ground. Parents, pay extra special attention to your

children as they walk in this area. At no time is anyone to touch anything that may be left over from the demonstration. If you find anything on the ground other than paper, please don't touch it. Instead, bring it to the attention of one of the living historians and we will see that it is taken care of.

As the Marine completed his safety briefing, the unique sound of a Jeep's 4-cylinder engine being revved up came from our right. The Marine announced it was his platoon leader, a lieutenant. Dressed in the uniform of a U.S.M.C. lieutenant from World War II, the museum's curator drove across the field in a Jeep, stopping directly in front of the audience. The enlisted Marine came to attention and rendered the lieutenant a perfect hand salute. The lieutenant returned the salute and dismissed the enlisted man. Immediately, I recognized the smells associated with so many military vehicles. The smell of exhaust, oil, and mildewed canvas assailed my nose, as did the slightly rancid smell of axle grease exposed to the hot, humid air. Memories of my own time in the military flooded back to me, as I'm sure it did every other veteran in the audience. The lieutenant exchanged his helmet for a folded garrison cap, placed his weapon in the Jeep, and turned with a smile to greet us.

He began by telling us that he would provide an overview to the war in the Pacific. The overview would be split into two parts--the early war and the later war. The lieutenant explained that the early part of the war was characterized by infantry battles in which each side was similarly armed. Each had a bolt-action rifle. The Japanese believed in the superior power of the warrior spirit, in bushido, a belief that led to banzai attacks. According to the curator, the battle at Guadalcanal was indicative of the kind of fighting engaged in by the Japanese and the Marines. By 1944, however, things had changed. The Marines were using M1 rifles that were semi-automatic and held more rounds than their old M1903 Springfields. Thompson submachine guns and

the Browning Automatic Rifle (BAR) made mincemeat out of Japanese human wave attacks. The Japanese realized they had to change their strategy.

Later in the war, the Japanese resorted to digging in and fighting a defensive war; best typified by the US experience at Iwo Jima and Okinawa. In response, U.S. tactics changed as well. Marines began to use flamethrowers, satchel charges, and “Bangalore torpedoes” to blast the Japanese out of their bunkers. The infantry began to link up with tanks and other armored vehicles in order to reduce enemy defenses. Finally, heavy machine guns and cannons began to be used to fire directly into the Japanese bunkers. Once he was through explaining the two periods of the war, the curator announced it was time to demonstrate the weapons.

Until now, much of our experience in Fredericksburg had been similar to those available at several museums around the country. While the collection was more focused and in some ways more unique, the methods of transmitting information, of teaching, had been traditional. We had walked through a museum and had seen these same weapon types in their display cases. We had received a lecture from the lieutenant about how the weapons were used during World War II in the Pacific. Now we were moving on to something different. All of the weapons we had observed in the museum and heard about during the lieutenant’s lecture were about to come to life. No longer inanimate objects displayed for cognitive analysis, they were about to transmit information to us in a different way. Not 20 feet in front of us, they became the deadly weapons they were designed to be.

One by one, the weapons used by a Marine Corps battalion in World War II were brought out. A short lecture identified important aspects of the weapon from the

perspective of a Marine in combat. For example, we learned that Marines had to be careful when loading the M1 Garand rifle. If they were careless, the rifle's bolt would catch the Marine's thumb and slam into it. Similarly, standard Japanese weapons were exhibited as well. We learned that the standard Japanese rifle, the Arisaka, was often taller than the Japanese soldier who used when mounted with a bayonet. In addition, the rifle had a hook near the muzzle which could be used to catch a Marine's bayonet during hand to hand combat. Once the Japanese soldier captured the Marine's bayonet in the hook, the enemy soldier would use it as a pivot point and slam the butt of his Arisaka rifle into the Marine. In every case, the weapon was demonstrated and we heard its unique sonic signature as it was fired. We experienced the difference between a single shot M1903 Springfield from early in the war and a semi-automatic M1 rifle fielded later in the war. We saw the difference in design and heard the difference in fire between a standard rifle and the Browning Automatic Rifle (BAR). We heard the difference between the standard Japanese rifle, which when fired gave off a high-pitched crack due to its smaller caliber, as opposed to the M1 rifle with its lower-pitched bark as a result of its larger caliber. Similarly, the audience got to see other weapons in operation such as light machine guns, flamethrowers, antitank guns, Japanese rifles, Japanese machine guns, and satchel charges.

The demonstration ended with a mock assault on an enemy bunker in which all of the authentic weapons and tactics of the period were used in the mock attack. The following description is from my journal.

In the silence, heat, and humidity, all that can be heard are grasshoppers and a few birds. Nearly a hundred people sit silently and a sense of expectancy hangs in the air. Suddenly, from our left, come the muffled sounds of soldiers running on sand. Several Marines come into view as they race over a hill, grab the



antitank gun and wheel it into position. A few short commands and then a thunderous 'BOOM.' The clanging sound of the brass shell casing ejecting from the cannon rings through the air as another is inserted. 'BOOM,' the cannon fires again. With each report, the audience jumps. In spite of our earplugs, the muzzle blast from the cannon hits our chests and empties our lungs each time it fires. I look at Charlee and Delta and observe they have their earplugs in, hands over their ears, and are staring slack jawed at the cannon. Their mouths are wide open. Obviously, they have already learned something as part of the trip thanks to the elderly veteran in front of them.

As the cannon fires its blank ammunition at the enemy bunker, a squad of Marines advances in leapfrog movements up the left side of the ridgeline. 'BANG! BANG! BANG!' We hear the sounds of lone riflemen choosing a target and firing individually. As the riflemen move, the BAR lays down short three-round bursts of supporting fire. 'BUDDADUT! BUDDADUT! BUDDADUT!' The squad advances with a practiced discipline always ensuring the enemy is under fire. 'BANG! BANG! BANG! BANG! BUDDADUT! BUDDADUT! BUDDADUT! BUDDADUT! BANG! BABANG!'

From our right, three Marines sprint across a short stretch of the field and drop behind a log. They are a light machine gun crew and carry different parts of the machine gun. As one drops behind the log, he throws a tripod to the ground. With a practiced motion, even before the tripod has hit the ground, another drops behind the log and places the machine gun on the tripod. As the one that had been carrying the tripod begins to load a belt of ammunition into the machine gun, the third Marine, the ammunition carrier, begins to fire at the enemy. 'BANG! BANG! BANG!' Once loaded, the machine gunner pulls back on a handle, sights the weapon, and pulls the trigger. 'DADADADADADADADAT! DADADADADADADADAT!'

The enemy position is now under attack from both the left and right. The enemy inhabitants of the bunker fire back with their Nambu machine gun. It can fire so fast one cannot hear individual reports as the bullets are fired. Instead, it has a distinctive sound as it fires: 'Riiiiiiip! Riiiiiiip! Riiiiiiip!' The air is full of explosions, reports, yells, and commands, each competing for our attention. The ground starts to rumble just as we hear powerful engines and the metal-grinding squeals of treads. A light tank and an armored car race in from the right flank. Their heavy machine guns begin to fire, each bullet like a distinct, yet perfectly timed hit on a bass drum. 'BomBomBomBomBom! BomBomBomBomBom!' They fire their five-round bursts of blank ammunition at the enemy. The tank turret swivels, stops, and its main gun fires: 'BOOM!' Our chests and lungs are assailed by the blast. Like a crescendo in a multi-sensory symphony of fatal music, the intensity and depth of the battle sights, sounds, smells, and sensations builds. Marines on the left and right advance closer to the enemy position. It is no longer possible to distinguish individual shots. Single shots from rifles come so fast they sound like a string of firecrackers going off. The deeper barking of the BAR joins the cadence of the machine guns that sound like tenor drums and the booming bass notes of the cannons. Across the top, as if a descant, the Japanese machine

guns add their high-pitched 'RIIIIIIP!' A few reenactors rush forward under covering fire from their buddies and throw satchel charges into the bunker. 'BARUMPH! BARUMPH!' Seemingly out of nowhere, the flamethrower operator stands and fires. One doesn't hear the blast as much as feel it. Its 3,500° F. heat instantly radiates across the field and produces a burning sensation on our faces.

Our senses are in overload as the battle reaches its climax, each of the body's senses vying for the brain's attention as sound, heat, smell, taste, and imagery crash against us. Adrenalin pumps through our bodies in natural reaction to the event. With a final roar of rifles, machineguns, cannons, explosives and three blasts from the flamethrower, the assault reaches its climax. Then, "CEASE FIRE! CEASE FIRE! CEASE FIRE!" The command is given to end all firing. As on the real battlefield, not every soldier gets the message or reacts immediately. With a few desultory shots from individual rifles, the attack comes to a halt. Amidst the unexpected silence hangs an oily cloud of burnt fuel, tempered by the sulfuric smell of spent cordite. The expedition members sit with their jaws dropped, mouths agape, frozen into motionless by what they have just seen. The experience is over.

The Marine lieutenant thanked the audience for coming to see the demonstration and announced that his fellow Marines and a few Japanese soldiers would be available to answer questions for the next 10-15 minutes. People poured out of the bleachers and gathered around the living historians. Among the people on the field were the six teenage members of the expedition who just looked at the weapons and equipment up close while others asked questions.

We were all emotionally and physically spent after our day, so after the demonstration was over I informed the rest of the team that they were officially off duty. I asked what they wanted to do and Delta said, "Let's go get dinner someplace and head home." We walked back to the van, loaded ourselves in, and drove to a nearby combination hamburger restaurant and ice cream parlor. There, once we had our food and were quietly eating, I began to ask the teenagers their opinion of the day. Reflected in my journal notes are the following parts of that conversation.

Victor: The stuff with the guns firing was great!

Glenn: Why did you like it?

Victor: Because it was so real. I mean, when you see these guns in a museum, that's nice, but you don't really learn about them. Today, we got to see them used the way they were in World War II. To hear them and see them...Man, I'll never forget that.

Delta: I can't believe how noisy it was! How do the soldiers even know what their commander is telling them to do when all of that is going on?

Glenn: Well, that's why training is so important. When you look at those reenactors attacking that bunker, they have done that a hundred times. They work together; they know what the other members of the squad are going to do before they even do it. That's what military training is all about. You know what you are supposed to do so well that even when you are scared to death you find yourself accomplishing the mission. You become like a robot.

Mike: Did you see all of the trouble the BAR operator was having with his weapon? It kept on jamming on him. I hate when that happens!

Charlee: I can't believe how hot it must have been for them. We aren't even in the Pacific and those guys were soaked with sweat. I know the soldiers in the Pacific didn't have showers in their foxholes...Boy! They must have smelled!"

[Everyone laughs]

Delta: That was so much fun! It was exciting and I felt like I was right there in the middle of a war. If school could do that, history would be a lot more interesting.

Mike: That demonstration was really helpful in understanding tactics that would have been used in the Pacific. It also showed, even though it was on a tiny scale, how confusing it can be in an assault. I can't even imagine what it would be like in a full-scale assault, with hundreds of weapons firing. Here we only had a dozen or so firing and I couldn't think.

Glenn: Why do you think schools don't teach like that?

Juliet: Because they are scared someone is going to do something stupid. The liability issue.

Victor: Yeah, you're right, but if they did that in school, I would actually stay awake!

Glenn: Well, schools come all of the time to this museum and see much of what we saw. How come your school can't come down here?

Sierra: It's too expensive to bring classes down here and what we just learned isn't going to be on the state exam.

[All of the teenagers nod their heads in agreement.]

Delta: We only do what we need to pass the test.

Initially, all of the comments offered by the teenagers dealt with the demonstration experience. I asked, "I haven't heard anything about the museum itself. What did you guys think about the museum?" Charlee responded by saying, "It was nice, but it was kind of boring." The other teenagers nodded their heads in agreement. Delta said, "It was a big museum and we only had about an hour in there. Nothing really grabbed my attention." Mike said, "The air conditioning was nice and they had great bathrooms!" Once again, laughter rippled around the table. "I know it's hard to compete with the excitement of the demonstration, but I want you to put yourself back in the museum," I said. "Are you telling me it was boring even the first time you went through it?" Sierra had been very quiet throughout the day, but she now said:

The museum was fine. It looked nice and was a better museum than I thought I was going to see. The problem is that I came here to learn about the 112<sup>th</sup> Cavalry. It didn't have much to say about the Army or the cavalry. Everything was about the Navy or the Marines.

Mike responded, "Well, it was the Pacific War Museum. A lot of the Pacific war was done by the Navy and the Marines." Delta said, "Yeah." I responded by saying:

I understand what you are saying, Sierra, but I think Mike brings out a good point. If we take a look at the theaters of the Pacific war, we have the North Pacific Theater which is up in the Aleutian Islands. In that, we had both the Army and the Navy participating and the Army Air Corps. If we look at the Central Pacific and the South Pacific, that was primarily Navy and the Marine Corps with some of the Army Air Corps participating. If we look at the Southwest Pacific with General MacArthur, that was Navy, one Marine division, and the rest was Army and Army Air Corps. A tremendous amount of Army troops were used in the Southwest Pacific, but we just don't hear about the Southwest Pacific. You can go through that whole Museum of the Pacific War and the Southwest Pacific is hardly mentioned at all. The cavalry inside that Southwest Pacific Theater is mentioned even less.

Mike responded by saying, "I guess, I think it is just like a psyche--is that the word I'm looking for? A mindset people have, like, the Navy was in the Pacific, the Army was in Europe and North Africa, and the Army Air Corps was in China-Burma-India. "I

think you're right," I said, "I think that is a popular idea. Would it be correct to say that that is a popular misconception?" "Yeah," said Mike "a misconception we are going to resolve." With that, the other participants said, "Yeah!" and began to slap each other's hands in high fives around the table. For them, the questioning was done. By looking around at my co-researchers, I realized they had reached their limit. They were tired, they had done everything I had asked, and they just wanted to be teenagers for the rest of the day. It was time to go home.

Later on, the teenagers reflected on their experience as they addressed the Adjutant General of Texas at his headquarters in Austin. Charlee said:

And those reenactments at the Living History Unit at Fredericksburg really helped me picture those men in action. The noise of a Browning Automatic Rifle and the heat of one of the last existing fire throwers really captivated me. History in action! I feel lucky to have been able to see such an act, since many museums don't have the support to fund such an attraction. It showed me how much war has changed. Backs then, soldiers were face to face with the enemy; we had the Springfield and the Japanese still used swords. Now we don't even touch the enemy. We have such advanced tanks and artillery that we hardly acknowledge a bayoneted rifle as being a useful weapon.

Six months after the event, it was still a vivid memory in Charlee's mind.

### Reading Oral Histories

Through the support of a local university oral history program, I was able to provide the participants with 13 oral histories of 112<sup>th</sup> Cavalry veterans. Drawn from 112<sup>th</sup> Cavalry veterans who had different backgrounds with regard to their regional backgrounds, education level, troop and squadron assignments while in the regiment, duty assignments, and year of enlistment or commissioning, the oral histories provided a rich and varied collection of accounts of life in the 112<sup>th</sup> Cavalry as well as life during the Depression. In all, approximately 1500 pages of oral history regarding the 112<sup>th</sup> Cavalry in World War II was available to the expedition.

I planned on exploiting our access to the oral histories according to the following procedure. First, each participant would read two oral histories, highlight each according to a particular color-coded protocol (see Appendix I), and write a reflective piece regarding each of the two oral histories they had read. I selected the first two oral histories they read: Ernest Kelley and George Fortenberry. During our initial team meetings, we would discuss each oral history in detail. By having all of the participants read the same oral history, I could maximize the probability that the teenagers would share a common base of experience between them.

As time went on, I took a more jigsaw style approach by having three of the participants read a different oral history than the other three participants. By using this approach I could double the vicarious experience of the team in a given time period and enliven discussions as participants identified contradictions, parallels, and gaps in the expedition's knowledge. Finally, I had pairs of students read a common oral history between them, but different from that of the other two pairs. By following this procedure, I was able to introduce the participants to 7 of 13 oral histories, the experiences of men in 5 of 8 of the regiment's cavalry troops, four distinct duty assignments, and a continuous narrative of the regiment from 1940 through 1946 by seven different informants.

Although many of the comments below were gathered from several group meetings, interviews, and reflective pieces created by the teenagers regarding several of the oral histories, much of it has to do with their initial reaction to reading their first oral history, that of Ernest Kelley. His oral history is 203 pages in length and covers

information from his birth until his retirement from the Army in the 1960s. With regard to his time in the 112<sup>th</sup> Cavalry, it covers the period from November 1940 to August 1945.

I distributed Mr. Kelley's oral history to each of the expedition members when we made our trip to Fredericksburg. As I distributed it, I gave instructions to read it, prepare a short reflective piece, and to highlight it according to the accompanying protocol (see Appendix I). Now, three weeks later, on September 26, 2004, we would discuss the experience together. I started the meeting by asking how far each of them had gotten in the oral history. Several had completed reading the oral history and all of the teenagers were at least halfway through the document. I said, "What is your impression so far? What struck you as you were reading that was neat, or was un-neat? Or just tell me your reaction to what was happening to Mr. Kelley as you read his oral history." Charlee responded by saying:

I liked how he had a lot of humor in his interview, like, how he told a lot of funny stories. That made me keep reading the interview because I would laugh at different moments. So, I'd be like, "Oh, what's next?" That's what I liked about it, the funny parts.

I asked the rest of the group if anything else came to mind. Delta responded by saying, "With him going on about how there was nothing to do, it sounded like they were pretty bored. So, they were just, like, sitting around." I asked if anyone remembered where Mr. Kelley grew up and what his life was like as he was growing up. Charlee responded, "Texarkana. He was a farmer." Delta observed, "He started working at seven years old, knowing how to plow and work with the big, old mules and stuff." Charlee observed, "It was interesting how Texas high school only went until the 11<sup>th</sup> grade, not to 12<sup>th</sup> grade." Mike replied, "And back then there was no kindergarten. So, they only got 10 years [of school]." "And there were only 11 people in his class," Juliet

added. I asked if anyone was struck by “his description of playing as a kid?” Juliet said, “They played in the cotton gin.” “Yeah,” said Charlee, “that was dangerous! They didn’t have any guidelines or safety zones or stuff like that. They played baseball a lot and playing in a cotton gin seemed to be the only hobby.” At that point, the conversation broke down as all of the teenagers began to simultaneously talk about Mr. Kelley’s recreational experiences during the Depression.

As the teenagers discussed Mr. Kelley’s experiences during the Depression, they seemed to have been affected most by learning how his youthful life had been so different from theirs. Whether the topic was what he did for fun, the chores he had to do, his family’s financial situation, or the lack of electricity, running water, central heating, and air conditioning, the teenagers spoke as if Mr. Kelley was a relic from some other alien world. It certainly was not a world any of them felt they knew. That point is well illustrated using an excerpt from an interview with Charlee from March 28, 2005. During that interview, I asked Charlee if there was anything she had learned from reading the oral histories other than information regarding the military.

Charlee: Oh, yeah. You learned about their childhood. That kind of reflected the whole environment of the nation through the Depression and how you saved every penny, didn’t waste anything, and even though you might be crippled you still found a way to earn money for your family. Kids were running around with no shoes, working three jobs, and maybe going to school.

Glenn: Do you think that growing up now is much like it was then, or is growing up now different?

Charlee: It’s a lot different. We expect to own five pairs of shoes, or go to college. Back then, you were lucky to go to high school and stuff. Many of them didn’t go to college. Back then, they were worried about, “Oh! Am I going to have enough food for my family today?” Today we are worried about, “Oh! My gosh! Am I going to get a “C” or an “A” in school? Is my favorite TV show going to be canceled?”



Charlee's comments reflect her recognition that in the span of two generations, life had changed dramatically in Texas. It had gone from what could be called the subsistence economy of rural farm families living in Depression-era Texas to that of a capitalist economy, which is robust, multi-sector, and consumer based.

The majority of the 112<sup>th</sup> Cavalry veterans' narratives fall into a similar chronological pattern. First, they describe their time growing up during the Depression, then their life with the 112<sup>th</sup> Cavalry, and, finally, their return to the United States when the war was over. Having spoken with the teenagers about Mr. Kelley's life during the Depression, I was interested in hearing their comments regarding his time in the horse cavalry. I asked, "What struck you about how he entered the cavalry?" With that, everyone began to talk at once. As things quieted down, Charlee said, "He just kind of drove in one day. I just thought it was so funny how they were unprepared for him to join. Like, they didn't have his uniform." After the teenagers contributed further information regarding Mr. Kelley's first day in the Army, I asked, "Can anybody remember what really caused him to join?" Charlee, Juliet, Mike, and Victor described how he and his father went to the Armistice Day parade in Texarkana on November 11, 1940. There, Mr. Kelley told his dad that he thought he would like to join the cavalry outfit he saw during the parade. The following dialog occurred as part of our conversation.

Mike: Oh! He is 19 and he--

Juliet: Doesn't have a job.

Glenn: What era is it?

Mike, Juliet: The Depression.

Charlee: Like, right after the Great Depression.

Mike: The very end of the Great Depression.

- Glenn: Right. So, he joins the National Guard. That means he trains at least once or twice per month and gets paid for it. What that means is that there is an income that he didn't have [prior to joining]. He happens to join up, and this date is going to become very, very familiar to you, on November 18, 1940. The reason that date is important is because that was the day the Texas National Guard was taken into federal service. That means that the President was now in charge of his unit as opposed to the person who was normally in charge of the National Guard. That person being?
- Charlee: The state governor.
- Glenn: The governor of the State of Texas. Correct. Did anything strike you about his description of his time in the horse cavalry?
- Delta: Well, they didn't fight on horses like I thought; they dismounted. And one person was in charge of bringing the horses to a safety zone.
- Delta: They pretty much turned into infantry.
- Juliet: They were used for transportation.
- Glenn: What struck you about the relationships between the troopers and their horses?
- Charlee: Well, like, they depended on them for everything. The horses were like their backpacks. The horses got to carry all of the equipment while the soldiers got to ride on them. They were dependent on each other. The soldier had to feed the horse, had to clean the horse, and had to make sure the horse was in good shape in order to be able to do what it needed to do.

Once again, the teenagers were struck by how different the narrative was from their preconceived notions. For example, Juliet was surprised at the proximate event which caused Mr. Kelley's enlistment in the National Guard yet she understood his motivations: "That Mr. Kelley made the decision to join the National Guard after seeing a parade surprised me a little. But, I do think it made sense: he was 1A, with no job, and no concrete plans for the future." With regard to George Fortenberry's interview, Victor commented how the medical side of his experience was far different than Victor had imagined:

From reading Mr. Fortenberry's interview, I have learned a lot more about a different part of the Cavalry. ...I had never realized the 'little-to-none' training they

received...I also never realized how many different variations of injuries took place on the field. It seems they had everything from gun wounds to skin problems to mental hysteria.

Of particular interest to me during this conversation were the first signs of the teenagers using jargon associated with the military. In the above excerpts, Delta describes the cavalymen fighting dismounted and how they “pretty much turned into infantry.” When Juliet speaks of Mr. Kelley’s “1A” status she is alluding to his status with the local draft board using War Department jargon.

As the conversation continued, I wanted to find out which parts of Mr. Kelley’s narrative were most interesting to the teenagers and why the teenagers found them interesting. Sierra described how just learning about experiences so different from hers was interesting:

The one thing that sparked my interest to most was the day-to-day factors and the life of the men serving in the 112<sup>th</sup> Cavalry and the other citizens of the time. For instance, the geography and terrain the men had to adapt at work around, such as the mosquitoes in Louisiana and those in New Caledonia...Similarly, the care of the horses strikes my mind. What tools did they use? What types of horses did they have and where did the horses come from?

In his written reflection, Victor responded by saying:

His descriptions of the battle scenes were very well described and interesting to read. The action that he took part in seemed to be very intense, which kept me wanting to read what happened. I liked how he told different events as ‘stories,’ because he would always tell you when he was about to start another story. So, you knew the next story was a different event from the one before. I liked how he managed to find some humor in some of the events, such as the story about the Japanese man and American man who ran into each other while trying to retrieve a ration box. I’m also glad he added the ending part of what happened after he was discharged. I wasn’t sure what happened to the soldiers after they were discharged until I read that.

The teenagers’ identities helped with their motivation to continue reading the oral histories. Both Juliet and Sierra responded that when they found information in Mr. Kelley’s interview that had bearing on their own personal interests and experiences it

made it more interesting. Juliet responded, “I found it interesting that when he mentioned the dentists toward the end. I’ve experienced substantial dental work and cringed when I read there were no painkillers--and it was powered by a foot pump had no electricity!” Sierra commented, “I enjoyed information concerning the band and medicine of the time. I am planning on a future in music and medicine and greatly enjoy seeing how things have changed, or not changed, over time.” Delta’s pastime as a high school band member also had an influence on her reading. She observed, “It was neat how he talked about the band and how proud the unit was of them. It would be interesting to hear how the band members felt during that time. Another aspect dealt with Sierra’s identity as a minority member. Her personal interest in minorities in the Army caused Sierra to make this observation concerning George Fortenberry’s interview:

One thing that greatly interested me was the minority groups serving with or around the 112<sup>th</sup>. Mr. Fortenberry mentioned a young Austrian boy who served with them. Also, he said that there were a few Mexicans that served as well. Additionally, the black outfit seemed to have their own unique characteristics.

I knew the oral histories contained a wide variety of references to weapons, equipment, and other jargon-laden parts of a soldier’s life. I was interested in determining how the participants dealt with references to items with which they were unfamiliar. The following excerpts provide evidence that some participants found portions of Mr. Kelley’s oral history boring, particularly his references to people, places, and things with which the participants were unfamiliar, or topics irrelevant to their personal interests.

Glenn:           How confusing is all of this weapons stuff to you?”

Victor:           Very.

Delta:           Yeah.

- Glenn: I think there are a lot of questions about weapons.
- Delta: I just kind of ignored it. I read that as, "Okay, he uses a weapon." But...Okay, he uses it, I don't know what it looks like...
- Victor: I can't understand it because I got so bored.
- Delta: Yeah, it is very boring.
- Charlee: I've found it interesting that he didn't just start out on M-16's, like we do right now.

Others responded concerning different obstacles they encountered:

- Juliet: I'm unfamiliar with the geography of the Southwest Pacific where Mr. Kelley fought, thus those details were a bit tedious for me.
- Victor: Although there were parts that I found boring or dragged on, there were also parts which were very exciting or caught my interest. I think the most boring part of the interview was the first few pages or so. I really wasn't interested in hearing about his life before the war, so I got bored through these pages. I also found the part describing the different ranks of the soldiers boring because of the fact I didn't understand the difference between them and kept getting the different ranks confused...There were certain terms he used, however, which I didn't understand so I circled them and put question marks next them...It was also hard sometimes to understand who he was talking about because he kept bringing up so many different names, but I couldn't remember if he had already described them or if they were just a random soldier.
- Charlee: To me, it would be helpful if I could have a big map in front of me, because I was confused and I did not know where these places were. Like, I could not understand the route the ships were going on, or the distance between them, or anything like that.

Sierra provided a very different view:

As strange as it seems, I found nothing in that interview that was boring. Everything in there had significance, and, in my opinion, deserves to be learned by anyone who's willing to read the interview. Even Mr. Kelley himself said that he wished his future generations to learn everything he addressed in the interview.

Some of the above problems were ameliorated as the teenagers read more of the oral histories and became more familiar with the subject area. Sierra commented:

After reading the interview with George Fortenberry, I have found that as I read more interviews the easier it is to comprehend them. With the first interview, it took me a long time to read. Mr. Fortenberry's interview flew by. I also noticed

that with this being the second interview, I had a better grasp of location and time period. I originally had issues keeping up with Mr. Kelley's accounts of where the 112<sup>th</sup> was overseas and what was happening at the time. I think that after already being introduced to the information, it was much easier to follow the oral history.

Separate from my interest in what the participants had learned from Mr. Kelley's oral history with regard to content knowledge, or what their opinions were of their experience, I was interested in learning what my co-researchers had learned with respect to the process and product of oral history itself. I had specifically spent little time explaining the process by which Mr. Kelley's oral history had been produced. Instead, I had simply given the transcript to each of the participants and asked them to read it. Consequently, I felt confident that the participants were unfamiliar with the oral history process, with the exception of Mike who, as my son, was very familiar with the oral history process. I was interested in exploring what knowledge the teenagers had constructed with regard to oral history as a result of reading a single oral history.

Glenn: How painful was it reading this transcript? It is not a book; it is a transcript. How painful was that?

Delta: It was not the painful at all. It looked really big to read, but then it, kind of, started going fast.

Charlee: There were a lot of names, though, of all the people.

Delta: Yeah, that got confusing. All of the names and places were just confusing.

Glenn: I've done 13 of these interviews. What do you think happens as you go across reading these 13 interviews?

Mike: Either they overlap or some things conflict with each other.

Glenn: But in terms of names and places, what begins to happen?

Juliet: They reinforce each other.

Glenn: Yes. When you see something the 13<sup>th</sup> time, it becomes pretty important doesn't it?

Delta: I guess it describes the event more, like, having 13 other different points of view.

Glenn: What to do editor's notes in the oral history do?

- Delta: They give you background information.
- Juliet: It keeps the ignorant reader still involved.
- Glenn: [Glenn laughs] Right! Okay, here's another one. Throughout the transcript, you're going to find brackets. Have any of you figured out under what circumstances you use brackets?
- Juliet: To clear it up.
- Delta: Sometimes they will say a name and not put, like, the full name. Brackets means that it was not said but it was referred to.
- Glenn: Right. That is at least one way that we use brackets. To insert information to clarify things that were not in the original conversation. So, you will find that a lot of these good ol' boys will drop parts of speech. They will be talking and they will say, "I had a hard time when ol' 'Admiral Pudge' threw me on the ground. So, I got up and stuck a pitchfork in him." When you read that sentence in the transcript, you realize that from an editorial perspective you need to change the sentence so that no one will misunderstand what is happening. So, you change it to read "I had a hard time when ol' 'Admiral Pudge' [his horse] threw me on the ground. I got up and stuck a pitchfork in him."

While the above could be determined by reading the oral history transcript, some portions of the oral history process can only become clear when the transcript is compared to the original recording. Therefore, I planned to conduct an exercise. I asked the team to turn to a specific page in Mr. Kelley's interview. It was a section of his interview that dealt with combat in the Philippines in 1944. As they read along, I played the audiotape of Mr. Kelley's interview from which the transcript was made. After three pages of transcript, I ended the tape. Then, I asked the teenagers how the two compared:

- Delta: Well, in the transcript it left out a lot of "uhs."
- Charlee: All of the fluff.
- Juliet: Pauses.
- Delta: And repetitions. And it kind of conformed, like, some sentences into a proper sentence. It changed up the words a little bit.
- Juliet: It organized it.

Glenn: What are the only times, do you think, that we leave stuff in which might not necessarily be correct English?

Delta: That's to give you an idea of what some... Like in Texas, we, speak in a certain way. When it is written, we usually have an apostrophe at the end of "ing" where they left out the "g" so the reader knows, "Oh! They have a Southern accent."

Juliet: Diction.

Delta: And education. Like saying "was" instead of "were."

Glenn ...That's because, exactly as you said, it delivers the message of the person's education level and their natural patterns of speech. What I did not want to do is to turn Mr. Kelley into Shakespeare.

Charlee: Yeah, or a textbook.

Glenn: Which do you think is a more effective way of getting you to understand how Mr. Kelley felt--the transcript or the tape [of his interview]?

Juliet: The tape.

Delta, Victor: The tape.

Glenn: What is the transcript unable to convey?

Juliet: Emotions.

Delta: The emotion in his voice.

Glenn: Right. Now, I had written down in there how Mr. Kelley had broken down emotionally. My editor changed that to what it now reads, which is--

Delta: "He begins weeping."

Glenn: Does that phrase accurately convey--

Delta: No.

Charlee: He is kind of like in agony.

Glenn: Mr. Kelley was not weeping, Mr. Kelley was, kind of, ripped apart by emotions.

Juliet: Yeah.

Glenn: So, I wanted you to see that there are some things the tape is able to do a lot better than the transcript. There are some things the transcript does a lot better than the tape. In the best of all worlds, if you are a researcher, what would you like to have?

Charlee: Both.



In general, the teenagers made positive comments regarding the use of oral history as part of the expedition. Juliet observed in her reflective piece:

Having no prior knowledge of the 112<sup>th</sup> Cavalry, I found this transcript to be extraordinarily enlightening...It is so important to preserve the personal perspectives of Mr. Kelley and other veterans in the form of his interviews. It is straight from their mouths--it's hard to beat a primary resource...I think that this interview is important for young people to read-to give some insight as to what prompted him and others to join the armed forces and what impact it had on their lives. Their entire generation was affected; all subsequent generations should hear what they have to say. My grandfather served and received a Purple Heart, but no one knew his story; it is lost.

#### *Participant Level of Interest and Topics of Interest*

The following findings illuminate the participants' experiences while engaged in reading oral histories. While simple statistics are often used, they are solely meant to be descriptive and directional in nature. In no instance should the following data be used in an inferential analysis due to (a) the small sample size, (b) the fact that the data were not generated under controlled, rigorous, and equitable conditions; (c) the fact that data are missing; and (d) the fact that coding was undertaken by only one researcher. In short, the following data were collected with the intent of illustrating for the reader the relative magnitude of a phenomenon observed through post hoc analysis as opposed to measuring the phenomenon for inferential statistical purposes.

As part of the oral history reading process, I had tasked the participants to highlight the oral history they were reading according to a particular protocol (see Appendix I). I requested the participants highlight what they were reading according to their interest in the subject matter. There were four mutually exclusive categories of information, each marked in its own color: (a) pink identified topics a participant believed were interesting; (b) yellow identified those topics a participant wanted me to teach them about; (c) orange identified topics a participant thought were interesting enough to

proactively research on their own; and (d) blue identified topics they thought were boring. The resulting multi-color highlights in an oral history transcript read by a participant communicated two important pieces of information: the frequency participants displayed any one of four levels of interest as they read the target oral histories and the particular topics that interested the reader. Given this, the data could be analyzed according to: (a) the frequency with which each participant displayed one of four levels of interest in the oral history material they were reading and (b) the frequency participants found a particular topic interesting. As expected, all of the reading took place out of my observation. Also, participants displayed more discipline in their highlighting when engaged with their initial transcripts than their subsequent transcripts. Consequently, this study reports data only from the two oral histories the participants read first, the Kelley and Fortenberry transcripts.

The initial analytical task was to analyze the frequency with which each participant displayed one of four levels of interest in the oral history material they were reading. The frequency with which participants highlighted the text within a transcript as any of four interest levels is shown in Table 1 for the Kelley transcript and Table 2 for the Fortenberry transcript. In those tables, frequency data are presented by participant, the total raw frequency count (*f*) associated with a particular interest level, and the percentage (%) of a participant's highlights associated with a particular interest level.

The second analytical task involved determining the frequency with which participants found a particular topic interesting. In order to perform this task, highlighted text was coded according to one of three major subject areas. The three subject areas were Great Depression, Army, and Other. Then, the text coded to a subject area was

Table 1

*Interest Categories for Kelley Transcript by Participant, Frequency, and Percentage*

Category	Juliet	Sierra	Mike	Victor	Delta	Charlee
This subject is interesting.						
<i>f</i>	64	80	3	46	14	-
%	70	47	10	50	88	-
Teach me about this subject.						
<i>f</i>	17	50	8	17	1	-
%	18	29	28	19	7	-
I will research this subject.						
<i>f</i>	6	41	18	6	0	-
%	7	24	62	7	0	-
This subject is boring.						
<i>f</i>	5	0	0	22	4	-
%	5	0	0	24	20	-
Total ( <i>f</i> )	92	171	29	91	19	-

Table 2

*Interest Categories for Fortenberry Transcript by Participant, Frequency, and Percentage*

Category	Juliet	Sierra	Mike	Victor	Delta	Charlee
This subject is interesting.						
<i>f</i>	73	93	-	95	41	32
%	58	65	-	62	80	97
Teach me about this subject.						
<i>f</i>	6	27	-	33	7	0
%	5	19	-	21	14	0
I will research this subject.						
<i>f</i>	32	23	-	7	2	0
%	26	16	-	5	4	0
This subject is boring.						
<i>f</i>	14	1	-	19	1	1
%	11	0	-	12	2	3
Total ( <i>f</i> )	125	144	-	154	51	33

further analyzed, coded, and assigned, when possible, to a particular topic within that subject area. For example, Great Depression topics included government programs, housing, education, and recreation. Army consisted of 17 topics such as induction, training, weapons, combat, horses, daily life, recreation, and coming home. Topics not associated with Great Depression or Army were grouped within Other. A frequency analysis, totaled by participant and topic area, was conducted regarding how many times a particular topic was coded as being of interest to the participant. Frequency counts were transformed to a percentage based on the frequency with which a participant highlighted one topic compared to all other highlighted topics of interest in a particular oral history. The results presented in Table 3 and Table 4 portray the level of each participant's interest in particular topics included in the Kelley and Fortenberry oral histories.

When determining the topics a participant found most interesting, the category Other was not considered for statistical summary. This decision was based on the rationale that while the Other category may contain as high as 29% of an individual's highlighted phrases of interest, it is a category as opposed to a subject area. Unlike the categories Great Depression or Army which are true subject areas and which contain topics logically related to each other as part of the subject, the category Other is populated by a collection of fragmented topics with little relation to each other or the category in which they reside. To say that the Other category was not considered for statistical summary with regard to a participant's topics of interest is not to say, however, that it was ignored. Instead, to the extent any theme was observed in a participant's Other category it received comment in the textual presentation of findings.

Table 3

*Positive Interest Categories for Kelley Transcript by Participant, Topic, and Highlight Percentage Frequency*

Category	Frequency (%)					
	Juliet	Sierra	Mike	Victor	Delta	Charlee
Great Depression						
Government programs	1	<1	3	-	5	-
Family life	2	6	3	-	5	-
Housing	1	<1	-	-	-	-
Education	1	<1	-	-	5	-
Recreation	1	1	-	-	-	-
Army						
Induction	3	1	-	1	-	-
Organization	1	2	10	1	-	-
Training	2	8	17	4	-	-
Weapons	8	2	-	4	-	-
Tactics	11	6	-	3	-	-
Pearl Harbor	-	-	3	1	-	-
Combat	13	3	-	11	20	-
Supply	4	6	7	2	5	-
Equipment	3	5	17	2	-	-
Medical	3	3	-	1	-	-
Daily life	3	5	7	4	10	-
Recreation	3	6	-	2	-	-
Camaraderie	-	3	-	-	-	-
Horses	4	9	7	11	-	-
Band	1	<1	-	1	-	-
Natural environment	4	3	-	3	5	-
Coming home	2	1	-	2	-	-
Other	24	29	26	23	25	-
Total	95 <sup>a</sup>	100	100	76 <sup>b</sup>	80 <sup>c</sup>	-

<sup>a</sup> 5% of Juliet's highlights negative. <sup>b</sup> 24% of Victor's highlights negative. <sup>c</sup> 20% of Delta's highlights negative.

Table 4

*Positive Interest Categories for Fortenberry Transcript by Participant, Topic, and Highlight Percentage Frequency*

Category	Frequency (%)					
	Juliet	Sierra	Mike	Victor	Delta	Charlee
Great Depression						
Government programs	2	<1	-	-	-	-
Family life	2	6	-	1	6	12
Housing	-	-	-	-	-	-
Education	3	3	-	<1	2	3
Recreation	-	5	-	1	2	6
Army						
Induction	2	3	-	1	2	-
Organization	3	6	-	5	4	-
Training	2	<1	-	3	-	6
Weapons	3	1	-	<1	-	-
Tactics	9	4	-	1	-	-
Pearl Harbor	-	-	-	-	-	-
Combat	6	3	-	10	6	6
Supply	3	4	-	-	-	-
Equipment	3	4	-	2	-	-
Medical	24	14	-	15	37	12
Daily life	3	8	-	10	6	12
Recreation	1	8	-	6	12	9
Camaraderie	1	<1	-	<1	-	-
Horses	8	15	-	14	2	9
Band	2	1	-	2	14	6
Natural environment	2	1	-	<1	-	-
Coming home	1	3	-	3	2	-
Other	9	10	-	14	3	16
Total	89 <sup>a</sup>	100	-	88 <sup>b</sup>	98 <sup>c</sup>	97 <sup>d</sup>

<sup>a</sup> 11% of Juliet's highlights negative. <sup>b</sup> 12% of Victor's highlights negative. <sup>c</sup> 2% of Delta's highlights negative. <sup>d</sup> 3% of Charlee's highlights negative.

*Kelley oral history.* Juliet highlighted 92 passages in the Kelley oral history and indicated that 95% of those passages held positive interest, or were not boring, for her. Of those 87 passages which held positive interest, she indicated a desire to learn more than the oral history had to offer in 26% of them. Of the 23 passages she wanted to learn more about, she wanted me to take responsibility for teaching them in 74%, or 17, of the cases. The passages she was motivated to take personal responsibility for learning amounted to 7%, or 6, of the 87 passages which interested her. The topics in the Kelley transcript which held the most interest for her, based on the percentage each received of total positive interest highlights, were combat (13%), tactics (11%), and weapons (8%). Of the 7% of passages Juliet was willing to research on her own, all dealt with technology, for example: commercial ice making during the Depression, operation of the M1903 Springfield rifle, characteristics of the M1917 .45-caliber revolver as opposed to the M1911A1 .45-caliber semi-automatic pistol, operation of the Landing Vehicle, Tracked (LVT) "Alligator," development and operation of radar in World War II, and use by the Japanese of knee mortars. Of the 5% of passages Juliet found boring, most dealt with Kelley's time with the 112<sup>th</sup> Cavalry on Woodlark Island. During that period, the 112<sup>th</sup> had been dismounted and had their horses removed by the Army. Although their job was to defend the island, they were never attacked by enemy ground forces. In particular, Juliet was bored with information regarding how the SeaBees helped the 112<sup>th</sup> Cavalry prepare their positions on the island, Kelley's living conditions on the island, and the names of his lieutenants.

Sierra highlighted 171 passages in the Kelley oral history and indicated that all of those passages held positive interest for her. Of those passages which held positive



interest, she indicated a desire to learn more than the oral history had to offer in 53%, or 91, of them. Of the passages she wanted to learn more about, she wanted me to take responsibility for teaching them in 55% of the cases. The passages she was motivated to take personal responsibility for learning amounted to 24%, or 41, of the 171 passages which interested her. The topics in the Kelley transcript which held the most interest for her, based on the percentage each received of total positive interest highlights, were horses in the cavalry (9%), Army training (8%), and tied for third place, with 6% of the positive highlights apiece, were family life during the Depression, recreational opportunities in the 112<sup>th</sup> Cavalry, and supply issues. Of the 24% of passages Sierra was willing to research on her own, nearly half dealt with daily life in the cavalry. Other topic areas she was willing to research were horses in the cavalry, life during the Depression, the experience of various minorities in the Army during World War II, and Kelley's living conditions on Woodlark Island.

Unique among the participants, Sierra consistently highlighted passages regarding the experiences of racial minorities as they appeared in the Kelley and Fortenberry oral histories. She showed interest in the experiences of African American soldiers, Native American soldiers, discrimination against black Texans prior to World War II, and the experiences of gay U.S. soldiers in New Caledonia. Regarding the fact that she coded no passages as boring, Sierra said: "As strange as it seems, I found nothing in that interview that was boring. Everything in there had significance, and, in my opinion, deserves to be learned by anyone who's willing to read the interview. Even Mr. Kelley himself said that he wished his future generations to learn everything he addressed in the interview."

Victor highlighted 91 passages in the Kelley oral history and indicated that 76%, or 69, of those passages held positive interest for him. Of those passages which held positive interest, he indicated a desire to learn more than the oral history had to offer in 33% of them. Of the 23 passages he wanted to learn more about, he wanted me to take responsibility for teaching them in 74% of the cases. The passages he was motivated to take personal responsibility for learning amounted to 7%, or 6, of the 69 passages which interested him. The top two topics in the Kelley transcript which held the most interest for him, based on the percentage each received of total positive interest highlights, were combat (11%) and horses (11%). Tied for third place, each receiving 4% of his highlights, were training, weapons, and daily life in the Army. Of the 7% of passages Victor was willing to research on his own, all dealt with horses: learning to ride, the use of packhorses, caring for horses, drill on horseback, herd mentality, and gentling exercises. Of the 24% of passages Victor found boring, most dealt with passages concerning the Depression, his description of officers and other men he had served with, and, finally, his description of the natural environment in different duty stations.

Delta highlighted 19 passages in the Kelley oral history and indicated that 79%, or 15, of those passages held positive interest for her. Of those passages which held positive interest, she indicated a desire to learn more than the oral history had to offer in 7%, or 1, of them. Of the passages she wanted to learn more about, she wanted me to take responsibility for teaching them in 100% of the cases. She was motivated to take personal responsibility for learning in no instances. The topics in the Kelley transcript which held the most interest for her, based on the percentage each received of total

positive interest highlights, were combat (20%) and daily life in the Army (10%). Of the 20% of passages Delta found boring, most dealt with details of Kelley's family kinships and life during the Depression.

Mike highlighted 29 passages in the Kelley oral history and indicated that 100% of those passages held positive interest for him. Of those passages which held positive interest, he indicated a desire to learn more than the oral history had to offer in 90%, or 26, of them. Of the passages he wanted to learn more about, he wanted me to take responsibility for teaching them in 31%, or 8, of the cases. The passages he was motivated to take personal responsibility for learning amounted to 62%, or 18, of the 29 passages which interested him. The top three topics in the Kelley transcript which held the most interest for him, based on the percentage each received of total positive interest highlights, were equipment (17%), training (17%), and cavalry organization (10%). Of the 29% of passages Mike was willing to research on his own, most dealt with Kelley's time in the Army, particularly daily life in the cavalry, cavalry equipment, and the period of time the 112<sup>th</sup> Cavalry spent in the U.S. prior to deployment overseas. Mike's highlights in the Kelley transcript reflect a lack of boredom with the material.

Charlee read a portion of Kelley's transcript by the time the team met to discuss it. Concerning how far she had read in the document, Charlee said, "I got to where he is fighting with the Japanese in their raft." That is approximately halfway through Kelley's oral history. Charlee never turned in a highlighted copy of the Kelley document.

*Fortenberry oral history.* Juliet highlighted 125 passages in the Fortenberry oral history and indicated that 89%, or 111, of those passages held positive interest for her. Of those passages which held positive interest, she indicated a desire to learn more

than the oral history had to offer in 34% of them. Of the passages she wanted to learn more about, she wanted me to take responsibility for teaching them in 16% of the cases. The passages she was motivated to take personal responsibility for learning amounted to 29%, or 32, of the 111 passages which interested her.

The topics in the Fortenberry transcript which held the most interest for Juliet, based on the percentage each received of total positive interest highlights, were medical related (24%), tactics (9%), and horses (8%). The 26% of passages Juliet was willing to research on her own were primarily of a medical nature, with technology and weapons being a strong interest as well.

Sierra highlighted 144 passages in the Fortenberry oral history and indicated that >99%, or 143, of those passages held positive interest for her. Of those passages which held positive interest, she indicated a desire to learn more than the oral history had to offer in 35% of them. Of the 50 passages she wanted to learn more about, she wanted me to take responsibility for teaching them in 54% of the cases. The passages she was motivated to take personal responsibility for learning amounted to 16%, or 23, of the 143 passages which interested her.

The topics in the Fortenberry transcript which held the most interest for Sierra, based on the percentage each received of total positive interest highlights, were horses in the cavalry (15%), medical issues (14%), and tied for third place, with 8% of the positive highlights apiece, were daily life and recreation in the cavalry. Of the 23% of passages Sierra was willing to research on her own, more than half dealt with the experiences of minorities during World War II. The many of the other passages she was willing to research were associated with recreation by soldiers during the war.

Victor highlighted 154 passages in the Fortenberry oral history and indicated that 88%, or 135 of those passages held positive interest for him. Of those passages which held positive interest, he indicated a desire to learn more than the oral history had to offer in 30% of them. Of the passages he wanted to learn more about, he wanted me to take responsibility for teaching them in 83% of the cases. The passages he was motivated to take personal responsibility for learning amounted to 5%, or 7, of the 135 passages which interested him.

The top two topics in the Fortenberry transcript which held the most interest for him, based on the percentage each received of total positive interest highlights, were medical issues (15%) and horses (14%). Tied for third place, each receiving 8% of his highlights, were daily life and recreation in the Army. Of the 5% of passages Victor was willing to research on his own, all dealt with horses. Of the 12% of passages Victor found boring, most dealt with passages concerning the Depression and his description of officers and other men he had served with. Of note was his categorization as boring of a passage in which Fortenberry described how a 112<sup>th</sup> Cavalry veteran was a Pulitzer Prize winner.

Delta highlighted 51 passages in the Fortenberry oral history and indicated that 98% of those passages held positive interest for her. Of those 50 passages which held positive interest, she indicated a desire to learn more than the oral history had to offer in 4% of them. Of the 9 passages she wanted to learn more about, she wanted me to take responsibility for teaching them in 78% of the cases. She was motivated to take personal responsibility for learning in 4%, or 2, of the passages which interested her.

The topics in the Fortenberry transcript which held the most interest for Delta, based on the percentage each received of total positive interest highlights, were medical issues (37%), the 112<sup>th</sup> Cavalry band (14%), and recreation in the regiment (12%). The one passage Delta found boring involved Fortenberry's recitation of the elementary schools he had attended and the names of his teachers and administrators.

Charlee highlighted 33 passages in the Fortenberry oral history and indicated that 97%, or 32, of those passages held positive interest for her. Of those passages which held positive interest, she indicated a desire to learn more than the oral history had to offer in none of them. Charlee did not want me to teach her about them in any case, nor was she interested in learning about them on her own. In other words, in no instances was Charlee motivated to take personal responsibility for learning with regard to the Fortenberry transcript.

The topics in the Fortenberry transcript which held the most interest for Charlee, based on the percentage each received of total positive interest highlights, were equally weighted. They consisted of medical issues (12%), daily life in the cavalry (12%), and Fortenberry's family life during the Depression (12%). The one passage Charlee found boring dealt with the schools Fortenberry attended during the Depression.

Mike never turned in a highlighted copy of the Fortenberry transcript. He later told me that he had difficulty keeping up with the reading and that having to think about his highlighting responsibilities placed too much strain on him. Instead, he chose to read the interview without highlighting it.

Much can be learned from the above analysis with regard to each of the participants. By analyzing how each of the teenagers marked their oral histories, a

thumbnail sketch can be developed regarding the personalities and interests of the participants. While not conclusive, the following sketches illuminate the character of each of the participants and, when used in conjunction with other data gathered during this project, help define each of the teenagers who participated in the project.

Juliet continually showed a high level of interest in the material she was reading and wanted to learn more than the oral histories had to offer. When the subject was interesting, but not tied to her future career, Juliet was happy to have me teach her about it. On the other hand, if the topic was closely related to her future vocation, Juliet was very willing to pursue further research regarding the topic on her own. Juliet also showed a greater interest in things which were technical in nature than things which dealt with the more human aspects associated with life in a cavalry regiment.

Sierra was interested in virtually everything she read in the oral histories. Her interests reflected a desire to learn about the human aspects of life in the cavalry. In particular, her focus on the experiences of minorities in the cavalry spoke to a desire to learn about World War II through the eyes of Hispanic Americans, African Americans, and Native Americans. When displaying an interest in learning more about a subject, Sierra's preferred methods were approximately evenly split between being taught by me or learning on her own. The characteristics of Sierra's pattern of highlighting passages in the oral histories reflect a young woman who was an interested, self-motivated learner.

Mike showed less interest overall in the oral histories than did many of the other participants, but Mike, as my son, knew more than the others about the 112th Cavalry. The individual 112th veterans' oral histories had been a topic of conversation in our

house for at least one year before the project started, consequently, Mike found fewer topics interesting than other participants. On the other hand, Mike exhibited an interest in personally pursuing the majority of topics he found interesting, as opposed to me teaching him about those topics. While already knowledgeable about his favorite topic, weapons, Mike showed an interest in the complementary areas of training and equipment. In general, Mike was an engaged, self motivated reader.

Victor found fewer items interesting in the Kelley interview than he did the Fortenberry interview. Since Victor had as his career goal becoming a veterinarian, the oral history of the medical clerk and veterinary assistant, George Fortenberry, held special interest for him. While interested in learning more concerning a number of items, Victor most frequently wanted to be taught about those subjects as opposed to pursuing them as personal research. In addition, those topics farthest from his interest area he found boring; in particular, he found reminiscences concerning the Great Depression, Fortenberry's early education, and personal information regarding others in the 112th Cavalry boring. Victor showed a particular interest in research subject early on, however, he usually preferred to hear the details of new information from someone else as opposed to researching the information on his own.

Delta and Charlee exhibited many of the same characteristics with regard to their highlighting patterns in the oral histories. Both were on the lower end of the spectrum of total highlights in the oral histories they read when compared to the other participants. In addition, of the information they found interesting, in few instances did they want to learn more about it. They exhibited little interest in learning more about a topic through personal research. In their highlighting patterns, Delta and Charlee revealed a desire to



complete the assignment of reading the oral histories; however, there was little desire to learn more. Based on the evidence provided in this particular activity, it appeared that Delta and Charlee would do what they were asked but little more. The oral histories, although interesting to them, did little to motivate them to learn more than the oral histories had to offer.

Based on the above analysis, several items are worth noting. First, each of the 22 categories (e.g. Great Depression categories and Army categories) from Tables 3 and 4 received attention from at least one of the participants. Consequently, taken together, the interests of the six teenagers led to a comprehensive interest in the information the oral histories had to offer. The areas of greatest interest to the teenagers as they read the Kelley oral history were reminiscences regarding combat, training, horses, daily life in the cavalry, equipment, and tactics. As they read their second oral history, the Fortenberry oral history, the areas of greatest interest to the teenagers were: medical, horses, daily life in the cavalry, recreation, combat, and the regimental band. The differences in teenager interest between the two oral histories are largely explained by the fact that Earnest Kelley was combat rifleman and George Fortenberry was attached to the veterinary and medical staff. Consequently, they each had deep insight into separate experiences and functions within the regiment and spoke with great detail regarding their respective military experiences. The teenagers showed the greatest interest in the areas of expertise developed by each of the veterans. In other words, the teenagers were most interested in learning about the 112th Cavalry through subject matter experts who exhibited deep knowledge based on diverse experiences during World War II. In general, the areas which proved least interesting to

the teenagers were the Kelley and Fortenberry's descriptions of the Great Depression, induction into the Army, and their experiences coming home. Evidence suggests that during the reading of the oral histories, the teenagers continually maintained a mission orientation by focusing on the story of the 112th Cavalry during World War II to the exclusion of other related stories.

### *General Comments by Participants Regarding Oral History*

In an exception to the general chronological format of this chapter, the following comments concerning oral history are provided by way of individual interviews which took place in March and April 2005. While there is a section of this chapter devoted to those interviews, substantive comments regarding oral history made during those interviews by expedition participants are presented here in order to maintain topical unity.

The following dialog is from an interview I had with Sierra:

Glenn: What are the things that we've worked with that have strongly remained with you over the course of the project?

Sierra: I think the oral histories. Just reading them and getting to hear some on tape. That kind of thing.

Glenn: Were the oral histories made any more interesting, or less interesting, by meeting some of the veterans at the 112<sup>th</sup> Cavalry reunion?

Sierra: I think it made it more interesting, because you now have a face to place on the story. You can see how they act, like when we just sat in the back at the ceremony and we see how they interact with each other (Individual interview, April 13, 2005).

In the interview, Sierra and I engage in a dialog that causes her to reflect on the role oral history played in motivating her to commit to the expedition experience.

Glenn: How has this [expedition] been beneficial to you and what have you gained, so far?

- Sierra: Honestly, I have never been big on history. It has not even been close to a forte of mine. This has given me a chance to look at history from a different angle and actually be interested in it.
- Glenn: What in this opportunity gave you that motivation to actually look at history, something that you may not necessarily have been excited about in the past?
- Sierra: ...I just came to the meetings, and it sounded like it would be interesting. I guess, just kicking off with Mr. Kelley's interview. After reading that, I can see...what it was going to be about and it just drives you through it (Individual interview, April 13, 2005).

In this excerpt, Sierra compares the place of oral histories which involve the same event with a newspaper article about that same event:

- Glenn: I think the last time you were here you read a newspaper article on the A Troop attack [at Arawe]. Mr. Kelley was in A Troop and was involved in that attack. How did his oral history differ from the newspaper article [about the same attack]?
- Sierra: The newspaper article was focused on getting the reader interested. Mr. Kelley wanted to tell his story about what happened. I guess that interviews are more direct as opposed to an article that is intended to inform, but also captivate readers.
- Glenn: When we do an oral history, where do we usually start in a subject's life?
- Sierra: Like, their home life before they joined. You get the background before you go into the main topic.
- Glenn: How is that different from a newspaper article about the attack at Arawe?
- Sierra: It [the newspaper article] is just the attack. It is nothing about the people...
- Glenn: Right. The article may mention names--
- Sierra: Yeah, but is not about their past.
- Glenn: ...Given that, why might a historian be interested in oral histories of the people involved in an event in addition to newspaper and magazine articles?
- Sierra: Because it provides a variety and you are not focusing on one thing. You can see a wide span of what's going on. The oral histories will give you the past of the people and individual stories. The newspapers are a little wider and you get to see what Troop A did as opposed to what Mr. Kelley did [as individual].

- Glenn: Whether it is looking at pictures, or reading oral histories, or anything that we have done, do you ever find yourself getting an emotional reaction to what you were involved with at that time?
- Sierra: Yeah, I do. I don't know whether it is just because... Yeah, because you are reading along and you just get so absorbed in what is going on and then you just get, kind of, attached to the story and what happens.
- Glenn: Given what you have done in this project and the oral histories that you have read which talk about the Depression, do you think you reacted differently when your teacher was teaching about the Depression in US history this year than other kids in the class who did not have the oral history background that you did?
- Sierra: I think so, because when they're telling you in class that there was a stock crash and things were bad, we don't really dive into what life was like. However, when we read the oral histories you see that they really didn't have anything and what it was honestly like back then. You can just see and you have a better understanding, a well-rounded grip of what went on (Individual interview, April 13, 2005).

A week earlier, Sierra commented on why she enjoyed working with oral history transcripts:

- Glenn: ...In your opinion, what are the things that you liked or did not like and what are the strengths and weaknesses of working with oral histories?
- Sierra: I personally think they are the bigger part. When it comes to reading, I normally read the oral history first and then go to, like, the war diary. But even when I came to highlighting, I never highlight blue, boring, because it really was not that boring. Occasionally, they won't talk about what you're trying to get to, and they will go back and talk about the same thing over and over again. But, I like the oral histories.
- Glenn: Why do you like them?
- Sierra: You get to know the person. Like Mr. Kelley's, you get to know Mr. Kelley, or Mr. Moody...
- Glenn: Although I collected the oral histories to get their [the veterans] experiences in the 112<sup>th</sup>, were there other things I learned about through the oral histories that did not concern the 112<sup>th</sup> Cavalry?
- Sierra: Yeah, even in the way they talk. You get to realize about their diction, their education you can easily see, like, what kind of education they had growing up. Just [learning about how it was] like just back then (Individual interview, April 6, 2005).

Victor provided insight as well concerning the influence of the oral history component on the quality of his expedition experience. This can be seen in the following dialog:

Glenn: As long as we are talking about sources, did any of those matter more to you than others did? Did some connect with you better than others?

Victor: The interviews connected with me more than the documents from the manuals or stuff.

Glenn: Why were the interviews interesting?

Victor: There were more understandable aspects, like I could understand what they were saying. They explained stuff so another human could understand it as opposed to a manual that, sort of, just gave straight out definitions...(Individual interview, April 16, 2005).

#### Team Meeting 1

Throughout the course of the history expedition, the team held meetings at my house in the expedition workroom. The meetings served as a place to: (a) coordinate expedition activities, (b) discuss what participants had uncovered concerning the 112<sup>th</sup> Cavalry since the last meeting, (c) present new content in the format of short classes, videos, or audio, and (d) ask questions, make comments, and reflect on the expedition's state of affairs. For the most part, only those portions of the meetings dealing with the presentation of new content or discussion of past assignments were audio recorded. While attendance was expected of all participants, occasional absences were understood as participants were unable to rearrange appointments, family gatherings, or other events to fit the expedition schedule.

The first team meeting took place on a Sunday, September 26, 2004, from 1:30-4:30 p.m. at my home. All the expedition members were in attendance as we talked about the Kelley oral history in particular and oral history in general. The teenagers

were aware that we were to discuss the Kelley interview that day; the implicit expectation was that each teenager would have completed reading the Kelley oral history. After a few opening remarks, I said:

Glenn: How far have you gotten in reading this transcript?

Mike: I finished it this morning.

Juliet: I got halfway through.

Charlee: I got to where he is fighting with the Japanese in their raft. [halfway]

Delta: I completed the whole thing this morning and I completed my paper right before I came here.

Sierra: The same. I finished, and I wrote the paper.

We spent much of the next hour discussing what the teenagers had read and their impressions of oral history. Much of the discussion is summarized in the foregoing discussion in this chapter concerning the reading of oral history during the expedition.

New content delivery was often tied to a discussion of previous content with which the teenagers had engaged and provided an avenue for teaching participants about the practice of history. An excerpt from the transcript of this meeting captures my attempt to provide information regarding the Army and the practice of history. In particular, I attempted to explain: (a) why terminology and jargon was important to the researcher, (b) how it related to Army organization through Tables of Organization and Equipment, (c) how its mastery could aid in the research effort, and (d) in part, how oral historians use anomalies in the data as a starting point for further investigation (see Appendix P).

After discussing the Kelley interview, we spent time covering new material that would help explain and contextualize what the teenagers were reading in the oral histories. Based on interviews I had with the teenagers, I realized they lacked

foundational knowledge regarding the war. As a way to further their education regarding the Army and World War II, I provided them with handouts regarding: rank structure and insignia in the U.S. military, medals for bravery, combat badges, the phonetic alphabet, military time, and the organization of a cavalry regiment in World War II. In addition, I planned several activities that might help them better understand the background of the war.

First, we watched the “Design for War” episode from the documentary series *Victory at Sea* (Hanser, Salomon, & Kleinerman, 1954). The episode reviewed the beginning of World War II in Europe and explained such events as the Versailles Treaty, the position of the Ruhr after World War I, the Anschluss, the famous phrase “Peace in our time!” by Chamberlain, as well as the invasion of Poland on September 1, 1939, and the Blitzkrieg. Little discussion was involved with this activity. It seemed like my co-researchers were using it as an opportunity to recover from their extended discussion regarding the Kelley interview.

Following a refreshment break, we watched an episode from the Readers Digest video series *America The Way We Were* (Readers Digest Video, 1989). The episode dealt with America’s home front of World War II from 1940-1941. Our procedure for the viewing of this video was different from the prior one. This video purported to show America as it was in 1940-1941. I charged the teenagers with a particular task. Whenever they saw something in the video which was contradicted by the Kelley or Fortenberry interview, they were to raise their hand and comment on what they had just seen. This strategy worked well. My co-researchers seemed more engaged with the

task, made informed observations, and were able to illustrate that they had learned much from the Kelley oral history.

Mike pointed out that while the narrator was describing how Americans were enlisting in the U.S. Army the video scenes were of men enlisting in the British military. Juliet observed that all of the farmers were shown using tractors and that was not the case in many places in Texas during 1940. Delta observed that only African American farmers were shown using plows. Yet, our oral histories alluded to the fact that the plow was still in use on family farms in Texas. While the documentary talked about the Regular Army and the draft, at no time was anything mentioned about the National Guard, observed Victor. Sierra pointed out that when the program described the terrible economic plight of many African Americans, the scenes were reminiscent of how many of the men interviewed from the 112<sup>th</sup> Cavalry had grown up. After a discussion, the teenagers came to an agreement about the video program. They decided that in an attempt to portray the U.S. in sound bites, the director had developed a stereotypical approach to portraying the U.S. in 1940, an approach that did not portray the reality of Texas, Mississippi, Louisiana, and Oklahoma during that year. They based their argument on what they had read in their two oral histories. My impressions of the day as excerpted from my journal are:

The students have clearly read the material. They are able to answer questions and provide examples from Mr. Kelley's transcript. They are appreciative of his sense of humor. When they watched the video on the homefront in 1940, they identified that the description of the US in the video was not representative at all of Mr. Kelley's experience. They have not seen many other movies that explain the end of WWI, the Depression, and the beginning of WWII. They had a recognition of the Versailles Treaty but not an understanding (Investigator's journal, September 26, 2004).



## Attending the Regimental Reunion

On October 15-17, 2004, the members of the expedition attended the annual reunion of the 112<sup>th</sup> Cavalry Association. In the words of one of the association members: "If the kids are really going to be working on the history of these men - meeting them would make it so much better." For that very reason, I knew I had to get as many members of the expedition over to the reunion as possible. All were able to make it except for Juliet. She was suffering from her accident during the summer as well as her subsequent surgeries. Consequently, Juliet stayed at home but sent her regrets.

The reunion began on the evening of Friday, 15 October, at an upscale hotel in a nearby city. Having attended the reunion the previous year, I knew the lay of the land. The teenagers, on the other hand, had some real concerns about the experience. Delta viewed the reunion as a time when she would "meet a few old guys," and Charlee expected to meet "a few nice, old men." Sierra admitted she was apprehensive. On the way over to event, she was questioning why she was attending. She asked, "What are we and the veterans going to have in common? What can we talk about? How will they react to a bunch of teenagers?" Contrary to the normally boisterous behavior my co-researchers exhibited while in my van, the mood of the teenagers on the way to the reunion was subdued.

When we arrived at the hotel, we walked into the lobby and immediately saw the sign for the 112<sup>th</sup> Cavalry reunion. The 112<sup>th</sup>'s insignia, a rearing black horse on a field of yellow, was unmistakable. At first, I was unable to recognize anyone in the area. I saw elderly men, their wives, and a few middle-aged sons and daughters gathered in the area near the sign. Then, I spotted who I was looking for. On a couch near the sign,

were the remaining survivors of A Troop's abortive rubber boat attack at Arawe: Ernest Kelley, Charles Brabham, Lloyd Hudson, and W.W. Hughes. These were some of the first men whose oral histories we had read or discussed. They called us over and I began to introduce them to the teenagers.

The men I introduced to the teenagers had lived through an ambush designed to kill every man in their unit. Paddling in toward the enemy beach in three waves of rubber boats, A Troop's 152 men had been ambushed 100 yards from shore. In their oral histories, each of them described their ordeal. Ernest Kelley had been in a rubber boat in the last echelon and could only watch as the rest of A Troop was decimated. Carrying a machine gun, he was unable to fire it because he would have hit the men in front of him. Charles Brabham, the A Troop bugler, described how the enemy's anti-aircraft cannons fired down at them from cliffs high above the landing beach. Those enemy anti-aircraft guns were firing inch-wide bullets at a rate of 500 per minute into A Troop's 10 rubber boats paddling toward shore. W.W. Hughes, who was a sergeant at Arawe, described combat loaded troopers floundering in the water as they tried to grab onto the remnants of the rubber rafts and swim back out to sea away from the enemy guns. He described how they had wooden plugs for repairing holes in the rubber boats, but how the boats were getting punctured faster than they could repair. Lloyd Hudson, who was wounded in the attack, described the bravery of Kenneth Cooke, a Native American, who was a corporal in A Troop. As men were drowning because of the sheer weight of their combat equipment, Corporal Cooke would dive underwater, cut off their gear with his knife, and drag them back up to a coral reef or the remnants of the rubber boats. He did this repeatedly, in full view of the enemy, and under their gunfire. The

teenagers knew what these men had done and were aware of who they were meeting. Regarding meeting these men, one participant later said, “I got chills. I was really awestruck to be in their presence. We knew their stories. They were like legends to us. We really stood back a minute and said...“Thank you for your service.” But, it just seemed like such a measly offering.” In their first 10 minutes at the reunion, the teenagers had already experienced a tie to the historical past that would become a powerful memory for each of them.

The evening’s activity was a sing along. With high levels of anxiety, but per my guidance, the teenagers spread out among the various tables of 112<sup>th</sup> veterans and their families. The first song, “I’ll Fly Away” (Brumley, 1929), was a well known number from the recent movie *Oh Brother, Where Art Thou?* (Coen & Coen, 2000). The teenagers knew it and exhibited some real singing ability as they sang along with their fellow table companions. The singer leading the get together was himself a Vietnam veteran of the Army Special Forces. Throughout the night, he provided narratives which tied the music to the venue of World War II. The next song was “Don’t Fence Me In” (Porter, 1934). After the song was over, the singer described how his dad would tell a story about that song and the D-Day invasion at Normandy, France. His dad was in a landing craft that day, along with the rest of his buddies. As they went in toward the landing, a number of men were frozen with fear. Someone started singing “Don’t Fence Me In.” Soon everyone in the landing craft was singing the song at the top of their lungs. His dad commented on how it caused their fear to go away. Then, the landing craft beached, the ramp dropped, and the men were to race ashore. His father said, “Son, that’s when the singing ended and the dying started.” Throughout the evening, stories

like that involved us in a constant emotional seesaw. For every upbeat song, there was a bittersweet story, and for every sad song, there was a humorous anecdote. By the time the evening was over, the teenagers had engaged in history by using music as a way to unlock the memories of those who were at their tables. Throughout the night, they had listened, asked questions, and took notes. When it was time to leave, the veterans and their families thanked the teenagers for coming and asked when they would be coming back. As with the ride over to the reunion, the ride home was quiet, with the mood, once again, subdued. This time, however, it was subdued because the teenagers were reflecting on their experience as opposed to their anxiety.

The following day, several of us went back over to the reunion looking for information. In our research, we had come across photographs on the Internet that purported to be of the 112<sup>th</sup> Cavalry in World War II. In many instances, however, there was no information associated with the who, how, where, why, and what of the photographs. We mounted copies of the photos on posterboard and took them to the reunion hotel with us. We had arranged to meet the veterans that morning over coffee in their hospitality area. Present at the time were Charles Brabham, Ernest Kelley, and W.W. Hughes, all from 1st Squadron's Troop A, and Edgar "Gig" Kent from Troop E of 2nd Squadron. Later in the day, we met with Ben Moody of Headquarters Troop and 2nd Squadron's F Troop. The following excerpt conveys the success of the activity as well as the camaraderie of the men.

Mike:           The Internet says this is a photograph of A Troop at Fort Bliss in 1940. It shows a mounted cavalry troop passing a reviewing stand. The troop has its .45-caliber pistols at port arms, or raised. Do any of you remember if this was you?

[Mike shows the photo to Kelley and Kelley examines it for almost one minute without saying a word]

- Kelley: No. That's not us. We never rode with our pistols raised like that. Did we? [Kelley shows photo to Brabham.]
- Brabham: That's not us, but we were in the review that day. That's the day we reviewed along with the 124<sup>th</sup> Cavalry and the 1st Cavalry Division. It was the biggest review of cavalry, some say, since the Civil War.
- Hughes: You mean the Great War of Northern Aggression?
- Brabham: Yes, the War of Southern Secession. [Hughes looks at photo.]
- Hughes: I agree, that's not us.
- Kelley: I'm sorry. It seems someone either has the right place and date, but the wrong outfit, or the right outfit, but the wrong place or date.
- Brabham: Do you remember that review? Whoo-eee! That was one dusty ride.
- Kelley: Normally, a cavalry troop rides in a column. That day, the whole troop stretched into one line. Troops in a line! I mean, one hundred fifty horses in a line! We went by the reviewing stand three times: at a walk, trot, and a gallop. The dust was so bad they used fire hoses to wet the ground. In between every troop, they'd shoot that there hose. You know, even with that, I never saw a darned thing except the line in front of us and about three men on either side of me.
- Brabham: We were packed in so tight, we'd as like break our knees when we tried to pivot that line.
- Hughes: You know Brother Brabham, you ain't changed one bit. Here we are 64 years later and you're still complaining!
- Brabham: W.W., you are correct. I'm glad to see you haven't changed either. You're still pointing out the weaknesses of others--in spite of that glass house you live in! (Investigator's journal, October 16, 2004).

Further discussion revealed that none of the veterans examining the photos remembered ever passing in review with their pistols out of their holsters and raised. As would happen throughout our project, the veterans sometimes remembered a different experience than was portrayed in sources other than their memories.

Later that day, I asked Mike how he had enjoyed the experience of asking the veterans about the photographs. He responded that he really enjoyed the experience. Such parsimonious responses answer the question, but provide little understanding to the one who asked the question. What I wanted to get at was whether he enjoyed

learning more about the subject, or whether he really enjoyed the veterans themselves.

In pursuit of that objective, I engaged Mike in the following discussion:

Glenn: When we were at the reunion today, we brought some photos along to see if we could get them identified. We had three or four different veterans from the 112<sup>th</sup> sitting there, and they gave their opinions. We could have had three or four historians on another couch who possibly had more knowledge in terms of facts and things like that than all of those veterans together. The only difference was that the historians were not there, and the veterans were. Who do you trust in that situation?

Mike: The veterans!

Glenn: Why is that?

Mike: Because they were there; they know what they are talking about. As many facts as the historians would know, they don't know what it was like, what was going on over there. They just have facts and things that were spoon fed to them...(Investigator's journal, October 16, 2004).

On the morning of the last day of the reunion, the association traditionally held a memorial service for all troopers who had passed away. This particular year, they requested the expedition's help to bring the service to fruition. The association specifically requested that the teenagers perform color guard duties that day. Since the teenagers were all members of their high school marching band, they all knew how to march and were familiar with the duties of a color guard. The night before the memorial service, I contacted my co-researchers to coordinate the dress code for the next day. We agreed upon church attire and the green leather letter jackets each of the teenagers had from their high school.

The day of the event, the expedition gathered at my house in preparation for our trip to the reunion hotel. In spite of my phone call the night before, Victor wore baggy shorts, running shoes, and a golf shirt. It turned out that is what he wore when he attended church. A quick stop by his house on the way to the hotel rectified the

problem. That day, the teenagers proved themselves of great value to the veterans. The teenagers provided the color guard, handed out the day's prayer to all of the attendees, and the teenagers selected Sierra to read a statement prepared by the veterans in honor of the day. After the memorial service, a banquet was served in the same room. During the banquet, a number of veterans stopped by the table at which we were seated in order to thank them for the help and for their interest in writing a history of the 112<sup>th</sup> Cavalry. One of the veterans, Riley Chennault, stopped by and said,

Y'all did a fine job here today. I wish I could tell you how much it means to us, but I'm not good with words. Someone else can do that. But here's what I can do. I can say thank you by giving y'all a piece of my favorite chewing gum (Investigator's journal, October 17, 2004).

With great dignity, he handed an individual piece to each of the teenagers. Then he said, "Thank you" and went back to his table. One hour later, the reunion ended, and we traveled back home.

The effect the reunion experience had on my co-researchers was obvious. In the speeches they made after the project was over, they had this to say about the reunion portion of the experience:

Sierra: The project group decided to volunteer at the 112<sup>th</sup> Cavalry reunion, which was attended by many of the soldiers whose oral histories we had read. At first, there was a feeling of apprehension. The idea of singing World War II songs with strangers and mingling with men who served so long ago in the United States Army was quite intimidating to this eighteen-year-old from a small town. Amazingly enough, by the end of the weekend, a certain feeling of comfort could be elicited from the faces of those men and their wives. Simply from having read their oral histories and observing the men in a memorial service, a sense of belonging drew all of the students into their world and their stories. I began to feel like I was visiting distant relatives with whom we shared humorous anecdotes about getting lost in the park. Even one of the men, Riley Chennault...came by our table and gave each student a piece of Big Red chewing gum.

- Delta: The men that I met...were very friendly and you could hear the emotion in their voices when they spoke of the war experiences. They were very close to each other and fell silent when the list of their deceased comrades was read. They didn't care if anyone saw them cry.
- Charlee: ...[S]eeing them in person at the reunions, wow!
- Victor: Attending the 112th cavalry reunion allowed me to learn about the comradeship that the veterans still possessed. You never really get a grasp for the kind of bond these people made with each other during their time in service. But when you see them at such an old age, still joking like they used to years ago, it shows you how connected they really must have been. (Participant speeches, November 2005).

### Team Meeting 2

The expedition convened a meeting at my house from 1:30-4:30 p.m. on October 31, 2004, with one member unable to attend. Sierra had contacted me to arrange for her absence caused by a visiting exchange student. She did, however, forward her reflection regarding the Fortenberry interview to me via e-mail. The meeting had as its agenda the discussion of the Fortenberry oral history and the transmission of additional contextual content information. The discussion of the Fortenberry interview lasted approximately one hour. Then, we watched a second episode from the television series *Victory at Sea* (Hanser, Salomon, & Kleinerman, 1954), followed by a 15-minute break. For the remainder of the afternoon, the team focused on two videos and a collection of artifacts. The first video concerned the 112th Cavalry in New Caledonia. A short film, it was a compilation of U.S. Army Signal Corps film footage shot while the regiment was still mounted on its horses. The second video was longer and concerned itself with the 112th Cavalry's assault against Arawe, New Britain, in December 1943. Filmed professionally, it was released to the American public in the summer of 1944 under the title *Attack! Battle of New Britain* (Capra & Presnell, 1944). Finally, I displayed,



addressed, and passed around a number of artifacts from the cavalry such as rank and branch insignia, dress spurs, ribbons, medals, holsters, pistol magazines, and training ammunition.

With regard to the Fortenberry interview, the teenagers had a variety of thoughts. Juliet enjoyed the opportunity to read a second oral history dealing with the 112th, this time from a different point of view. Juliet commented that being a medic, “he had to face so many gruesome things, too horrible to imagine.” She also commented that “[b]attle wasn’t the only hard thing--how about the living conditions?”

Juliet’s experience regarding reading a second oral history from a different perspective was similar to Sierra’s. In her reflection, Sierra commented, “As I read more interviews the easier it is to comprehend them. With the first interview, it took me a long time to read. Mr. Fortenberry’s interview flew by.” In particular, Sierra commented on her increasing familiarity with time and space with regard to the regiment’s experiences. “I had a better grasp of location and time period. I...had issues...with Kelley’s accounts of where the 112th was...and what was happening at the time. [B]eing introduced to the information, it was much easier to follow this oral history.” Sierra reflected on her interest in those parts of the transcript which closely matched her personal interests. One of her interest areas was the experience of minorities in World War II. “One thing that greatly interested me was the minority groups serving with or around the 112th. ...there were a few Mexicans that served, ...[a]dditionally, the black outfit seemed to have their own unique characteristics.” In addition, Sierra’s interest in those things medical also dovetailed with Dr. Fortenberry’s experiences. “I found a great interest in reading his encounters as a medic and a veterinarian. Perhaps, it is influenced by my

interest in the medical field.” Based on her readings in the Fortenberry oral history, Sierra constructed an understanding of the relationship of the medics to the other troopers.

I believe that a mutual respect was formed between the medics and the soldiers. The men had saved the medics from being killed at times, and through the aid of the medics, the soldiers were able to receive medical attention. He even talked about how he developed a brother-like relationship with the men he served with in the cavalry (Reflection, Fortenberry oral history, October 31, 2004).

In the end, Sierra commented on a dilemma she had reading the oral histories. “It is hard for me to comprehend the life of these men. However, each oral history I read, the more interested I become.”

Delta’s reflection exhibits less enthusiasm for the heavy reading load associated with reading the oral histories. Her first comment was, “Boy, was this a long interview.” Like Sierra, Delta was struck by how unromantic Dr. Fortenberry’s description of his experience was, this can be seen in her simple statement: “...[H]e must have had a strong stomach to be a medic. She also commented that “[i]t was surprising how he never had proper medical training.” As with others in the expedition, Delta was interested in the regimental band. “It was neat how he talked about the band and how proud the unit was of them. It would be interesting to hear how the band members felt during that time.”

Victor commented on a number of topics that others in the expedition had commented on as well. Victor observed, “I found this interview to be slightly more interesting than the Kelley interview.” Also, “I think the part that intrigued me the most of this interview was the whole medic scene he was part of. I had never realized the ‘little-to-none’ training they received...” As with Sierra who commented on how Dr. Fortenberry’s descriptions of various ailments grabbed her attention, Victor commented,

“I...never realized how many different variations of injuries took place on the field. It seems they had everything from gun wounds to skin problems to mental hysteria.” Victor’s interest in reading an oral history from a different perspective is seen in his comment that, “From reading Mr. Fortenberry’s interview, I have learned a lot more about a different part of the Cavalry.”

### Team Meeting 3

The third team meeting took place at my house from 1:30-5:15 p.m. on November 14, 2004, and all team members, with the exception of Charlee, were able to attend. Victor needed to leave at 3:00 p.m. due to his academic load. The agenda for the day’s meeting included discussion of the Chennault and Lay oral histories as well as participant comments regarding sections of the regimental war diary each had read. In terms of new content, I had purchased maps of the Pacific Ocean area, New Guinea, and the Philippines. In addition, I had purchased a globe as well. Using those tools, we conducted a location exercise. Finally, we read the oral history of two-time Pulitzer Prize winner Norman Mailer and listened to excerpts of his interview with particular focus on Mailer’s reaction as a non-Texan to the 112th, and the importance of lived experience as a basis for writing fiction.

The Mailer activity began with my introducing the author to the teenagers by way of the Web site Wikipedia. Sending my co-researchers to different computers within the work area, I had them do a search using “Norman Mailer.” Then, they were to choose the Wikipedia entry and read it. After reading the article, we discussed his importance as an American author. I distributed his oral history to the participants and we read along as we listened to a copy of the tape of his interview. Having already listened to a

number of other interviews with 112th veterans, the teenagers thought it odd to hear a 112th veteran who did not have a Texas accent. They also commented that he sounded more educated than other 112th veterans to which they had listened. They gave as justification for that inference the observations that, unlike other 112th veterans they had listened to, Mailer's grammar was correct, he used complex sentences, and he employed his vocabulary as if he were an artist. They noticed that unlike all of the other 112th oral history interviews, Mailer's spoken words required little editorial change to render as an oral history transcript. The teenagers said that more than any other 112th veteran they had spoken to, Mailer seemed to see the big picture, not just his own experiences. My co-researchers also enjoyed hearing Mailer speak of the relationship between lived experience and the development of a fictional work. Once our discussion had exhausted the teenager's views on the subject, we took a break.

The next part of the meeting was a discussion concerning what the participants had learned by reading sections of the 112th Cavalry's war diary. A 225 page document, the war diary covers the period from July 1, 1942, through January 5, 1946. The purpose of the war diary, or regimental diary as it is more properly called, is manifest in its name. It is a day-by-day account of the regiment's activities during much of World War II. Through daily entries, regimental activities are tracked by reference to the units involved and actions taken or orders given. For the most part, the only names used in the diary are those of senior officers, patrol leaders, unit commanders, or individuals killed in action.

The importance of the war diary to a professional researcher investigating the activities of the 112th Cavalry is paramount. It is the official record of the 112th, done by

members of the 112th, for the 112th. It, along with other documents, was submitted to higher headquarters at the end of the war in order to document the activities of the 112th during the war. As such, it is the primary tool for connecting dates, locations, units, individuals, and orders, to activities in which the regiment was engaged. It is a wonderful tool for providing context to the actions of units subordinate to the regiment as well as corroboration for other sources of information. While packed with useful data, its terse, objective reporting style gives it an air of a reference document as opposed to a colorful narrative. The war diary is, in general, boring.

In order to make the discussion more interesting, each participant had been assigned to read and comment on a different part of the diary than the others. The rationale was that a jigsaw learning activity, in this case a discussion, would prove more interesting than having each teenager read the entire war diary. The jigsaw activity reduced the amount of time the team as a whole had to devote to reading the war diary and allowed participants to compare and contrast the sections each had read. In addition to the jigsaw discussion, each of my co-researchers was tasked with writing a summary piece and a reflection regarding their particular reading assignment in the war diary. The following excerpts are from that day's discussion as well as the reflections each participant prepared for the meeting.

Sierra's assignment had been to read a portion of the diary covering the period May 15, 1945, through January 5, 1946. That portion of the war diary covered the 112th's last few weeks of fighting on Luzon, in the Philippines, as well as the 112th's time as a constabulary unit in postwar Japan. Her initial comments concerned the different ways a reader can determine when something happened in the history of the

regiment. In her own words, “I have found that a period within the work of the 112<sup>th</sup> can be determined by numerous factors: location can determine a period..., amount of combat, fighting a certain group, or climate.” Sierra determined that if one asked, “When did this happen to the 112th in World War II?” it could be answered by saying a location like Fort Clark, or the fact that they were in their heaviest fighting, or that they were engaged against the Shimbu Group, or that they were in the desert. She identified that biased or racist language was used in the war diary in reference to the Japanese. Sierra commented, “On every page it seems the Japanese are referred to as Japs, which must have been quite common to be included in documents.” She was surprised about “the bribing of Philippine civilians by Japanese to spy on American troops.” As she read, she posed questions which had not been answered by her reading. Specific questions were, “How often did civilians come in contact with the armed forces and was bribery common? Were civilians injured during the patrols? What did the average patrol consist of, as far as what to do and the number of people involved?” Finally, her reading motivated her to learn more than the war diary presented. Examples she commented on were, “What it was like for civilians and how their lives changed.” She was also interested in methods of using the terrain to hide, as pointed out on Sunday, May 20, 1945, with regard to the use of caves by the Japanese.

Victor’s comments concerning the war diary reflect a willingness to extrapolate from the data. In one example, his inductive reasoning leads from the specifics described in the war diary to a conclusion derived from the situation. He remarks, “The constant bombings on the units seemed to be a hindrance. They daily went through several bombings and red alerts. I’m guessing that when there was an alert, everyone

had to hide or take shelter. That probably slowed their process somewhat.” He seems willing to come to a similar conclusion in the following excerpt. “There were also supply problems occasionally. An example of this would be when one patrol got lost and ran out of water, causing them to return without finishing their objective. Whenever a patrol encountered an enemy and had to retreat (which happened in several occasions), there was probably a delay to make sure the enemy wasn’t following them.” Like Sierra, Victor also recognized the biased language in the war diary when he says, “The only occasions in which the documentation seemed to be possibly racist was when they referred to the Japanese as Japs (e.g. ‘17 Japs were killed’).”

During the discussion of his section, Victor asked me if I knew how much damage the Japanese bombs did. Victor said, “It seems like the Japanese dropped several bombs a day on the units. However, soldiers were hardly ever killed. Do the bombs make small explosions (like a 10 foot radius) or do they just miss often?” In addition to questions Victor had concerning the 112th as a result of his reading, he also had questions concerning the jargon used by the war diary. “I don’t understand some of the terminology such as what an OPLR was,” he said. “Also, I got confused when they were attacked from the right or left flank. Is that just the left and right side? Some gun names and location names were hard to understand also.” A final comment provides insight into Victor’s desire to better understand the activities of the 112th Cavalry. He commented:

It would be nice to know why they did some of these things. The war diary is useful as a reference but it only tells you the actions they took. It doesn’t tell you the reasons behind their actions. I’d like to know why they did certain things and for what purposes (Team meeting, transcript, November 14, 2004).

## Team Meeting 4

The team meeting on December 20, 2004, involved my co-researchers developing themes concerning the 112th's activities in World War II. The themes were based on what the participants had learned to date from their reading of oral histories, the war diary, discussions with the veterans themselves, and our team meetings. The following extended dialog provides insight concerning what the teenagers had learned, what themes they felt were important to a narrative of the 112th Cavalry, and dynamics of the group and my role as expedition leader in the learning process.

- Glenn: Let's talk about some of the ideas we came up with the last time... Some are big ideas and some smaller ideas. Some are geography like New Caledonia; some are events that the soldiers were involved in like movies, patrols, and things like that; some are topical like weapons, horses, and recreation...What I would like to do today is to take some of the bigger ideas and individually put down some particulars that we might want to talk about with regard to them...If we were to discuss the men as the theme, because remember we are going to have one, two, or three chapters devoted to the men, what are the topics?
- Charlee: I like their backgrounds.
- Delta: Their feelings about the war.
- Glenn: In particular, what were the backgrounds that you would be interested in talking about?
- Charlee: Their family.
- Juliet: The society they came from.
- Glenn: Instead of saying the society they came from can we say SES? Does anyone know what that stands for?
- Charlee: No.
- Glenn: ...Socio-economic status.
- Victor: Oh.
- Glenn: Essentially what it stands for is where in society you stand. Your family life will affect your socio-economic status.
- Victor: Education?
- Glenn: Education! Very good!



[All of the other participants go “Oooooooh!” and kid Victor.]

Delta: Like, why they went into the war.

Glenn: Reasons for entering.

Juliet: When they entered?

Glenn: When they entered. Exactly. We will put that is a subcategory under reasons...

Victor: ...The Great Depression.

Charlee: That is kind of under SES, right?

Glenn: Well, at SES would say, “My dad was a poor dirt farmer.” Everybody went through the Depression no matter what SES they were in. They lived through it, just like living through World War II. So, what in particular would we be interested in finding out?

Delta: What they did to get through it.

Juliet: How it specifically affected them.

Glenn: I’ve added the Great Depression and how it affected them. As you read any of these, were you blown away by any of the conditions any of these individuals found themselves in growing up?

Mike: The story of the guy whose father was crawling along to pick cotton.

Glenn: That would be Mr. Moody. In general, for those who grew up on farms, what were their houses like?

Juliet: Pretty simple.

Charlee: Yeah, pretty barn-like.

Victor: Commonly, no running water.

Charlee: No electricity.

Delta: No central air conditioning or heat.

Juliet: No telephone.

Glenn: They had telephones, but they were just odd.

Charlee : It had to go to the operator.

Delta: It was a party line.

Glenn: Bingo! It was a party line. We are still missing something else. [Glenn begins to play as if it is a charade and points to his ear] It sounds like?

Victor: Party?

Glenn: Party sounds like? [no one responds] How does a person from Boston say party?

Juliet: “Pahty.”

Delta: Potty?

Charlee: Potty!!! [laughter]

Mike: No indoor latrine!

Delta: They had outhouses.

Charlee: Oh, I knew that.

Glenn: I know it is a stretch from party line to potty. [laughter] [As Glenn writes on the butcher paper] Okay, no individual telephones, they had party lines. So, we have their family life, their SES status, education, parents' employment. Okay, or we tired of that one for the moment?

Victor: Yes.

Glenn: I can always gauge from Mike's lack of attention when he has had enough. When his eyes began rolling back in his head that's a pretty good indicator. [Laughter]

Okay, so we have Men [as a topic] done. Under Men, we have backgrounds, such as family life, social and economic status, their parents' employment, their education, their reasons for entering the military and when they entered; how the Great Depression affected them; and what their homes were like, for example, no running water, no electricity, no central heating or cooling, no indoor plumbing, and telephones with party lines (Team meeting, transcript, December 20, 2004).

The conversation went on for another hour. During that time, other themes identified by the teenagers were topics dealing with horses and mounted operations as well as weapons. The meeting concluded after I gave a 15-minute class on the development of the firearm from its beginning as a matchlock to its modern evolved form with center and rim fired cartridges. A disquieting incident took place as we were discussing the weapons used by the 112th in World War II. Delta believed the regiment was still using sabers during the World War II. When corrected by other members of the team, she responded that she had seen it in the John Wayne movie we had watched as part of the project. She was referring to the motion picture *She Wore a Yellow Ribbon* (Cooper, Farrell, & Ford, 1949) which I showed at the kickoff meeting in August. While I believed the movie was good because it provided historical context, she misunderstood

my intent in showing the movie and believed, instead, that the movie reflected the lives and operations of troopers in World War II. In spite of information and experiences to the contrary, Delta's belief that U.S. Cavalry troopers carried sabers in World War II had persisted at least four months into the project.

### Research Trip to Texas Military Forces Museum

On Tuesday, January 4, 2005, the expedition traveled to the Austin, Texas, in order to conduct research at the Texas Military Forces Museum. The museum had a variety of archived documents dealing with the history of the 112th Cavalry, a display section populated with a number of contextually exhibited artifacts, and a large number of artifacts in storage. In addition, 112th veteran Ernest Kelley volunteered at the museum and was there that day. The following narrative is supported by notes from my journal as well as the notes of the participants themselves.

As the teenagers got into my van to begin their trip to the museum, I handed each of them a cardboard box which contained white cotton gloves as well as a mechanical pencil. I said, "I'll tell you about these on our way down to the museum." During our trip to Austin, I explained that when historians work in archives and museums they are careful not to endanger the materials they work with. The white gloves protect documents and artifacts from being harmed by the oils present on a researcher's fingers. Pencils ensure that documents will not be irreparably damaged by ink spills or notations. By leaving briefcases and backpacks outside the facility, museums and archives are protected from theft and vandalism. Then I had Mike pass around a copy of a finding aid from the National Archives in College Park, Maryland, and I identified it as a finding aid. I asked the teenagers to do some detective work and

tell me what service a finding aid performed. In short order, all of the teenagers became acquainted with its purpose. The just-in-time delivery of the materials and a short class in their use would have short-term payoffs.

Greeted by the museum's education officer at the door, the team was shown into the cramped quarters of the library. There he had arranged for the use of three tables by expedition members. Having mentally prepared and physically equipped the teenagers for this visit, with great pride I watched as they removed pencils from their pockets as well as white cotton gloves. They asked the education officer if it was all right for them to use their own notepaper or if he preferred to provide them museum approved paper. He said, "Wow! It looks like you know what you are doing." Before we started, he gave us an orientation to the library and the archives. He had already pulled some files for the teenagers to start with, so he explained those as well. He showed the participants several documents and addressed them as finding aids. He asked, "Do any of you know what we use a finding aide for?" Victor replied, "Yeah. Those are aids for finding documents in an archive. They identify in which location the documents are located and a short description of their contents." The education officer smiled and said, "I've got a lot of things to do today, so why don't you get to work. We've arranged a tour of the museum, so the fellow who will be conducting that tour will be here as time allows. Any questions?" Since there were no questions, we started our research.

Working in teams, the teenagers retrieved a variety of folders and inventoried their contents making sure the documents retained their original position within the folder. As they came across items which seemed significant, they would bring them to my attention. Those whose information was not already reflected in our expedition

document collection located at my house were photocopied. While that was going on, Victor linked up with Ernest Kelley and began to interview him about horses in the 112th Cavalry. With the aid of artifacts from the 112th Cavalry exhibit, Kelley explained life in the mounted cavalry to Victor. At the same time, Mike and I went to the room containing the photo archives of the museum. There we worked with the curator to identify and look at any photographs associated with the 112th Cavalry. By the end of the day, we had approximately 120 photographs and fifty documents in our inventory as well as copies of four documents critical to our research. In addition, Victor had interviewed Ernest Kelley for approximately one hour with regard to the role of horses in the regiment. We left the museum with a greater understanding of the 112th than we had arrived with, and the teenagers got an opportunity to practice their skills of archival research.

An example of the kind of nuggets of information we learned as a result of our research at the museum is illustrated by a document Juliet identified. She came to me and asked if her understanding of the document was correct. I confirmed that it was. She responded, "Wow! You really can't measure how many soldiers were available unless you have this kind of report. You make a really bad assumption if you just look at what their assigned strength was and assume they were all there." The handwritten document comes from a time when the regiment was stationed at Fort Clark in Brackettville, Texas, but no date is given. It reflects that of the 178 men assigned to the unit, only 72 were present for duty on the drill field. The following is a transcript of the document and shows the reasons only 72 were present for duty.

178 men on role  
- 17 DS. SK. conf. frm. awol

161  
- 50 for housekeeping, regt. fatigue  
111  
- 14 in process of discharge  
97  
- 12 property check  
85  
- 6 at school  
79  
- 2 orderlies  
77  
- 1 extra man at HQ  
- 1 extra saddler  
75  
- 1 wood detail  
74  
- 1 chair detachment  
73  
- 1 1st Sgt.  
72 on drill field (Field notes from Texas Military Forces Museum, January 4, 2005).

The significance of the document Juliet identified with regard to estimates of troop strength on any given day is self explanatory. It is another indicator that military history requires greater diligence than simply going to an Army Table of Organization and Equipment (TO&E) and retrieving the assigned strength of a unit when one is analyzing relative power ratios between units in a battle. It illustrates the distinction between a unit's authorized strength as published in its TO&E, its actual assigned strength, and the reality on any given day of those actually present for duty.

#### Team Meetings 5-7

The Dr. Martin Luther King national holiday in 2005 provided an extended weekend in which to have two meetings. Team meeting 5 took place on January 15, 2005, and 6 took place on January 16, 2005. Team meeting 7 took place the following month, on March 26, 2005. While prior team meetings had focused on learning content

material apropos to the expedition's objectives, team meetings 5-7 were involved with organizing the research and writing effort.

On Saturday, January 15, the expedition met, with all participants in the expedition attending. The meeting centered on the realignment of research topics among the teenagers more equitably. That Victor was assigned horses, dogs, pigeons, amphibious warfare, and Arawe as research topics was too heavy a load for one individual. Consequently, the realignment of topics was in order. During the discussion, I sensed several participants were feeling overwhelmed with work. "Are you guys feeling overwhelmed?" I asked. Charlee responded "Yeah, not just by this, but in school work." Delta said, "Yeah. I'm on another project where I have to do research." Upon hearing this, others on the team voiced their dissatisfaction with Charlee and Delta. Mike responded by saying, "That's why this is called a research project." "You've got that right!" said Juliet. I had the sense that Mike and Juliet were rebuking Charlee and Delta for not applying themselves as hard as they could on behalf of the expedition. Later on, Charlee and Delta once again displayed a concern for the amount of time they felt they could offer to the expedition. As we were discussing the final assignment of research topics, we determined that Charlee's main topic would be Men and Delta's main topic the Battle of the Driniumor River. We also determined that Mike would research Weapons, Victor's topic would be Animals, Juliet would write on Diseases and Wounds, while Sierra had the Medical aspects of the 112th's experience as her topic. Then I asked, "Who wants to handle Arawe and amphibious warfare?" Delta responded, "I'm booked for the semester." Charlee simply said, "Yeah." Throughout the rest of the conversation, as other members of the team were increasing the load each was willing

to be responsible for, Charlee and Delta steadfastly refused to alter their single topic apiece. By the end of the meeting however, each had accepted responsibility for one additional topic.

We engaged in a lengthy discussion regarding the writing associated with our final product. Already, team members were commenting that we would not be able to finish for a June 2005 deadline. Instead, they believed we should opt for the September 2005 timeframe. I asked the teenagers what their concerns were. Delta responded:

Well, for me, I'm worried about keeping it clear about the Driniumor and not having it be just a jumble of facts. I want to have it be clear that this is what happened, how it ran, and that kind of thing. And being able to find all of that information and put it in order. Like, I will try to read the war diary and it is just, like, boring (Team meeting, transcript, January 15, 2005).

Charlee's worries revolved around "keeping it interesting. The style of writing, I guess." I provided examples of how they might address their topics and provided tips for narrowing what might be a very broad topic, or broadening what might be a very narrow one. As we were discussing their concerns, the telephone rang. As I left to answer the phone, the tape recorder kept recording the teenager's conversation. The following excerpt from the transcript provides an indication of where the heads of my teenaged high school juniors were at the time:

- Charlee: I'm really tired. Victor is going straight to the SATs. [Scholastic Aptitude Test]
- Mike: He's not going to the SATs.
- Charlee: To the class.
- Mike: Oh, the class....
- Delta; I have to get Mrs. [gives name] to sign for the Youth of the Year thing....
- Charlee: Does it matter who signs it?
- Delta: Yes!
- Charlee: It can be a friend!



Mike: No it can't.

Delta: Well, actually it can.

Mike: Nope. It can't.

Delta: I'm on the committee, and I know what I'm talking about.

Mike: You never know what you're talking about.

[Laughter]

Delta: Hey! But do I sign the paper and fill out all the stuff I do? Or, does the person who signed fill it out? Because how do they know that I'm in these various activities? Because the people who can nominate you are employers and friends and stuff. But the form that you fill out has a space for community activities and school activities. So, how does your employer know what you do?

Mike: You can tell them. Set up a little sheet.

Charlee: Just fill it out. I don't really care.

Delta: Okay. If I get nominated, then you are all going to get interviewed anyway (Team meeting, transcript, January 15, 2005).

At that point in the conversation I returned and the conversation ended.

The team met once again, the next day, at my house. Victor was unable to attend due to a conflict in his schedule; however, all of the other team members were there. The meeting was split into two parts. First, I reviewed our decisions from the prior day and, second, I explained the structure of the Army. As the meeting was ending, I gave each of the participants a compact disc (CD). The CD contained all of the documents we had gathered and studied with regard to the 112th Cavalry in World War II. Included on the CDs were all of the oral histories, the war diary, and several hundred pages of other primary source materials. The contents of the CD amounted to almost three moving boxes worth of documents. Each teenager now had all of the documents relevant to their topic on a readily available CD.

On February 20, 2005, the expedition met once again, from 1:00-4:00 p.m., in the work room at my house. In general, participants discussed where they stood with regard

to their research topics, their questions, and their concerns. At the meeting, we set up a schedule of times during which participants would meet with me individually for a one-on-one interview regarding the practice of history.

#### Individual interviews

I conducted individual interviews with each participant throughout the months of March and April 2005. The interviews were conducted for multiple purposes. First, I wanted to place the teenagers in the position of talking individually about the project from the perspective of what they had learned as well as how they perceived their experience to date. Second, I was interested in their analysis of photographs and drawings of the 112th Cavalry as primary sources. Third, I was interested in their ability to compare various text based primary sources.

#### *Images as Symbols of the 112th Cavalry Experience*

While many veterans of the 112th Cavalry were aware of photographs of the unit archived at the Texas Military Forces Museum, the veterans we spoke with were unaware of the Army's collection of paintings and drawings of the 112th's assault at Arawe. Produced as part of the U.S. Army's combat art program in World War II, the expedition's files contained digital reproductions of 43 pieces of artwork generated by combat artists involved in the Arawe attack. In addition, the expedition had digital reproductions of 120 black and white photographs associated with the 112th Cavalry. Since both photographs and combat artwork were created by soldiers involved in the actions they were documenting at the time the action was taking place, both forms of graphic record are primary sources. While examining how adolescents make use of photographs in developing historical understanding is not new (Harris, 2002; Perry,

2001), it is rare that high school students are asked to use them to the degree of 163 images centered on a particular event or other phenomenon.

In the first activity associated with each interview, participants were asked to select five images from the collection of 163 digitally reproduced photographs, paintings, and drawings, which spoke to them regarding their understanding of the 112th Cavalry's time in World War II. Once selected, each participant was asked to describe in what way the image spoke to him or her. My objective in engaging interviewees in this exercise was to allow them to voice their constructed understanding of the regiment in World War II as elicited by the images they selected.

The images Juliet chose were a painting that reflected teamwork, a photograph of destruction in the aftermath of a bombing raid, a painting portraying fear, a photograph of primitive living conditions in the combat zone, and, once again, a painting that reflected fear. In the following excerpt from her interview, Juliet describes how a particular painting spoke to her:

Juliet: This one is a painting of a man kind of curled up as if he was protecting himself from a tornado. He is a soldier, and he has clutched in his hand a rifle and, it looks like, a bayonet attached to it. You see some parts of planes are flying by overhead, and he is just ducking. His hands are rather exaggerated, and it shows his fear, and his strength, too. He is just hanging on for dear life.

Glenn: You mentioned the airplanes going overhead. What do you think is going on? Why is he looking like that?

Juliet: Well, it looks like he is trying to protect himself from strafing... There are no trees, so it's probably kind of an open area like a beach or something. Maybe they just landed and the planes are trying to prevent them from succeeding.

Glenn: What feeling do you get from that? Would you want to be him?

Juliet: No, absolutely not. He just looks desperate and...he's got his adrenaline pumping, I'm sure. Fight or flight. He's just wanting to stay alive and probably thinking, "Oh, God! Oh, God! I don't want to die! Just let it be

over.” So, it’s kind of very scary, really (Individual interview, March 30, 2005).

Mike chose five photographs which he felt symbolized the experience of the 112th Cavalry during World War II. The topics of his photos were a photograph of a horse being shod, a scout dog with his handler, a mounted patrol during the Louisiana Maneuvers, two soldiers eating on the frontlines in a combat zone, and a photo of the band. In the following excerpt from his interview, Mike describes the photo of the two soldiers eating in the jungle and certain features of the photograph:

Mike: Two soldiers eating their food; it looks like in the jungle because there are big palm trees in the background, in a pretty cleared out area. They both have weapons. They have dug their foxhole. They are eating their chow from their tin plates. They have got their tin mugs, I guess, [and they are] drinking their coffee or water, or whatever they were given in there. It looks like there is a duffel in the background that a rifle is leaning against.

Glenn: Any idea out what kind of rifles they are?

Mike: M1 Garands.

Glenn: If you had to describe the freshness of the soldiers, what would your description be?

Mike: They look pretty beat up, I guess, like seasoned soldiers. They are not sitting down and leaning back, they are kneeling, waiting. Like if something were to start going on, they would be ready to move.

Glenn: If you had to choose some adjectives to describe the way they look, what would those adjectives be?

Mike: It looks like, not necessarily that they haven’t shaven, but maybe they haven’t shaven for a day or two. Both of them have mustaches. They don’t have too much beard, which is why I say they are shaven recently, but not too recently. They got their foxhole dug before they started eating which is good to get done, as opposed to eating and [then] getting your foxhole dug. If something happened while you were eating, you are ready to jump in with your helmet...Their dog tags or hanging out. They are giving themselves air.

Glenn: Go back to the dog tags.

Mike: Taped.

Glenn: Taped. What does that tell you? Why would they do that?

- Mike: They realized that they can clang when they do anything.
- Glenn: So, you tape them together for what reason?
- Mike: On patrols. When you go out on patrols you don't want to make any noise that you did not need to (Individual interview, March 13, 2005).

Later during the discussion, I asked Mike to choose one piece of artwork from the expedition's collection which spoke to him regarding the 112th's experiences. Mike chose the painting Life and Death--Landing Operation Synthesis, by David Friedenthal (Friedenthal, 1943) which records the activities of the 112th Cavalry at the Arawe assault in 1943. The following discussion ensued:

- Glenn: What's it a painting of?
- Mike: It's a painting of a soldier who was killed on the beaches at Arawe. His buddy is sitting next to him crying, with his friend's blood all over him.
- Glenn: What's in the immediate background?
- Mike: The ocean.
- Glenn: And his friend who was killed, where are his legs?
- Mike: They are in the water, kind of, I guess, coming in and out with the tide. With the waves.
- Glenn: The soldier who was still alive and has the blood of his friend all over him, what position is he in?
- Mike: He is kind of in a sitting, fetal position with a rifle coming up next to his right leg and coming up through his right arm, like in the little hole that forms there.
- Glenn: Where is his head? What is the position of his head?
- Mike: He is crying onto his forearms and wrists. His elbows are on his knees. It almost looks like he is crying on his knees, like he is curled up in a ball.
- Glenn: If you had to describe the colors that the artist used, what would you say about the colors?
- Mike: Red is a very vibrant color, but [the artist used] a lot of very cool colors, a lot of faded greens, deep blues, browns, gray, and the paleness of the soldiers skin.
- Glenn: What do you think the artist was trying to portray in this painting?

- Mike: The horrors of war. How A Troop was absolutely annihilated in the landing at Arawe.
- Glenn: Why do you think he chose to put those two [troopers] so close together?
- Mike: I think because they just wound up...well, it would have been that they wound up right next to each other, but to show the grieving of the dead soldier's buddy.
- Glenn: What message do you think that gets to concerning the 112<sup>th</sup>?
- Mike: They were chosen for jobs that they were not suited for.
- Glenn: We have got like 35 paintings here. Why does that particular one speak to you?
- Mike: Because it wasn't just the 112<sup>th</sup> that this happened to. This happened at, like, every battle in the history of man.
- Glenn: So, to you, it is a human aspect of war that should not be limited simply to the 112<sup>th</sup>.
- Mike: Right (Individual interview, March 13, 2005).

At her interview, Charlee selected her five images which spoke to her about the 112th Cavalry. The topics of her images were a photograph depicting horses in a stable, a painting of an LVT going in for an amphibious assault, a photograph of soldiers listening to a class outdoors, a painting of soldiers on a transport ship, and a painting of soldiers below deck on a transport just taking it easy. She describes why she chose the photograph of the horses in a barn:

Because it seems like every interview that we have listened to they mention, you know, parts about their horse, or, in their stories, they have been with their horse. Like, 'They were in their stables a lot and we had to clean their feet.' So, just, they all had to be with their horse, I guess (Individual interview, March 28, 2005).

During her interview, Sierra chose a photograph of primitive living conditions in the jungle, a drawing of survivors from A Troop's aborted attack swimming to safety, a photograph of a horse being shod, a photograph of horses being watered, and a photograph of a briefing being held on the top deck of an assault transport. Below she

describes how the photograph of the horses being watered is symbolic of her understanding of the 112th's experiences in World War II:

This next one is also with horses, but I thought it was different from this one [the last photo] because you can see, like, the horses look thin to me. I don't know. Like, because I have New Caledonia, and it mentions how the grass there wasn't great for their nutrition and ships shipped it in, it just looks like you can see that sometimes it was hard for the horses as well (Individual interview, April 6, 2005).

Delta and I met for her interview and I engaged her in the image exercise. Her five images consisted of a photograph of a horse being shod, a drawing of survivors from A Troop's aborted attack swimming to safety, a photograph of a command group making use of radio in the jungle, a painting of soldiers relaxing aboard ship, and a painting of an outpost in the jungle. In the following excerpt from her interview, Delta describes the symbolism of the photograph of the command group using the radio in the jungle. In her description, she incorrectly identifies the mission of the 112th Cavalry:

...The next one looks, like, about, five soldiers and a commander. One of the soldiers is holding onto a telephone that is connected to, like, the radio box. This signifies the 112<sup>th</sup> Cavalry because that was their mission, to, like, connect the radio wires along the islands and stuff. So, that is what they are doing (Individual interview, April 11, 2005).

In another part of the interview, she describes the symbolism of the painting of the jungle outpost and places it in a context congruent with other sources of information:

Delta: This one is another painting and it is colorful. It is the jungle. This looks, like, to me, the jungle. There are three soldiers...or four, actually. They are kind of hidden and one of them is cleaning off his gun. One has his helmet hanging off of a branch with his machete, I guess. They seem like they are kind of waiting for something to happen.

Glenn: Okay. What feeling do you think the artist was trying to give the observer of that picture?

Delta: They were always, kind of, on their guard, I guess. They were never slacking off and saying, "Oh, no one is here so we can do whatever." They were always prepared, but they were not always fighting the

entire time. There were quiet periods during the war (Individual interview, April 11, 2005).

### *Photographs Versus Artwork as Primary Sources*

During their interviews, I asked the expedition participants to address the issue of photographs versus artwork as primary sources. Participants either chose or were provided an example or several examples of photographs and artwork from the expedition's collection. Excerpts from their interviews are presented to illustrate the teenagers' cognitive and affective responses to the two forms of graphic media.

Delta chose a photograph of General Cunningham's primitive headquarters in the jungle to compare with a painting of two troopers advancing up a muddy road on a combat patrol near Arawe. During her interview, she made these comments concerning the two:

Glenn: If you had to bring one into court to try and prove something, which would you rather bring in the photo were the painting?

Delta: It would kind of have to be on a topic. But, probably a photo. Because the courts might use microscopes in a court room, or something, so they could look at every little detail. This [photo] is actually more factual than the picture [painting]. They don't know if 10 years later the painting was drawn and if the guy [artist] was even there. A picture [photograph] is more proof.

Glenn: In general, if we separated all of the paintings onto one side and all of the photos onto at other...

Delta: The paintings, or the drawings, seem to show the harshness and reality of war. You know the photos show reality too, but, the photos are more like, "okay, this is what we do at camp. This is what we do in life. But, then, I guess, they kind of would not want to take a picture in the very middle of the battle. So, they would not have a weapon in their hand, instead, they would have the camera. That is why there aren't that many pictures of the battle going on (Individual interview, April 11, 2005).

In Victor's interview, we used the same two images as in Delta's interview. The first was a painting of a two man patrol in Umtingalu near Arawe (Vidar, 1943). The



second was a U.S. Army Signal Corps photograph of General Cunningham's primitive jungle headquarters. His comments are include in the following dialog:

Victor: [Victor looks at the painting of the patrol at Umtingalu.] This looks like a stormy night and, I guess, there might actually be a battle going on, because there are two soldiers who have their guns and they are sort of crouched a bit. They look prepared. They are by a big hut and there are a ton of boxes everywhere, along with, it looks like, a wrecked cannon.

Glenn: How is that different from the other images that you have looked at, so far?

Victor: A lot more gloomy. More serious, like, actual battle, more fear, I guess.

Glenn: ...That painting that you have is a painting of the village of Umtingalu...We have lots of records that talk about where A Troop landed in the rubber boat landing at Umtingalu. We have lots of records...which speak about the 2<sup>nd</sup> Squadron coming out and capturing Umtingalu. What we do not have are any photos of Umtingalu. We don't have a clue about what the place looked like. You have a painting of it. Since that painting was done at the time of the event--the painting may not have been, but the sketch certainly was--it would be a primary source. What are the pros and cons of using that painting as a source for describing Umtingalu?

Victor: I think that even though it may have been painted during the time, the artist could have...exaggerated some things, added some things he thought could add some sort of element to make it more gloomy and complete. Therefore, maybe all of that stuff wasn't there.

Glenn: So, the first thing is a negative response that there is interpretation going on and that the artist might be more interested in, maybe, creating a mood than in displaying fact...Remember there is a place we know called Umtingalu, but we don't have any photos of it. There is not one on the face of the earth today that shows what Umtingalu looked like [on that day]. Is the painting valuable?

Victor: I think it would be. You know, even if he had exaggerated it you can get basic ideas....You can probably get some sort of mental image of what it must have looked like. There is nothing else, so it is better than nothing (Individual interview, April 9, 2005).

At this point in the interview, I introduced the photograph of General Cunningham's headquarters. After discussing what Victor observed in the photograph, we engaged in the following dialog:

- Glenn: Given those two that are both representations of places; one's a photo and one's the painting. To you, what is the photo better at doing than the painting?
- Victor: It is more detailed and it has specifics like exactly how they set up their tents, how much junk they had everywhere, and just, like, more detail.
- Glenn: Is it detail that you can trust or is their interpretation there?
- Victor: No, it is a photograph, and you can trust it.
- Glenn: Okay, you can pretty much trust it... That is what the photo is pretty much great for. What is the painting good for?
- Victor: It, sort of, tells you whoever was there and how they felt about the moment, the place, and how they interpreted it. So, if they interpreted it some way you can probably go along with the fact that other people felt that way about it. You can see how they thought about the place (Individual interview, April 9, 2005).

I interviewed Sierra and engaged her in a discussion of the merits of two images as primary sources. As in the foregoing interviews, the photograph was of General Cunningham's jungle headquarters and the painting depicted a two-man patrol in Umtingalu. During our discussion, I asked Sierra which was the better primary source the photograph or the painting. She replied:

- Sierra: I would probably choose the photograph.
- Glenn: Okay, and why is that?
- Sierra: Just because that sometimes in artwork--and I'm not saying that he has--some things are not exact replicas. A photo is like an exact snapshot of what was there (Individual interview, April 6, 2005).

I constructed the same scenario for Sierra as for Victor regarding the value of the painting if it was the only graphic we had of Umtingalu in 1943-1944. Then, I asked the following question:

- Glenn: Are we better off not knowing anything about Umtingalu, or are we better off seeing it through the eyes and the interpretation of the combat artist? Are we better off with nothing, or something that is very subjective?
- Sierra: Something subjective, I think.

- Glenn: Why do you believe that?
- Sierra: Because he was there. Even, sometimes, verbal descriptions can be subjective. This is just a visual description of what he saw. It is like him describing it himself, just through art...
- Glenn: I'm now going to give you a painting of a 112<sup>th</sup> cavalry soldier at Arawe. If you will compare it with the [photograph of] two gentlemen eating in the jungle. You have now got two different images of two different instances, so in many ways they are not comparable, but we can compare them in terms of their value as a primary source. What is the photo of the two soldiers eating really good at doing?
- Sierra: I think it gives a good character of what it was like.
- Glenn: Why is that?
- Sierra: Just the detail, like you can see their clothing, their food, their rifles, their placement of them.
- Glenn: What is the painting better at, if it is better at anything?
- Sierra: I think it also captures character and emotions and what it was like (Individual interview, April 6, 2005).

I met with Charlee regarding photographs versus artwork as primary sources. During our discussion, Charlee was describing the photograph of the 112th Cavalry troopers listening to a lecture outside on a field. I asked her to take any painting of the 112th she wished and that we would discuss the two. The following is excerpted from the ensuing conversation:

- Glenn: You are a researcher. What do you think the photograph is really good for...versus what do you think the painting is really good for?
- Charlee: I guess the picture [photograph] is really good for showing the beginning of the formation of the cavalry. Like there is just a bunch of mixed guys, and they are accurate. You can actually see the real stuff.
- Glenn: Name a particular thing you can see in detail [in the photograph].
- Charlee: The bomb on the table, the tents in the background, and, like, every single blade of grass. Their expressions on their faces...
- Glenn: Okay. Let's talk about the painting a little bit...
- Charlee: All the paintings are more, kind of like, fantasy, I guess. They are a little bit of fiction because they are not actual pictures [photographs]. The paintings are sketchy and not detailed that much. Kind of like

[this one], on the bunks where they are all just talking. The colors kind of blend together, so you really have to look at it to see the picture sometimes.

Glenn: If you had to write a history of the 112<sup>th</sup>, do you think the photographs would be important to that history?

Charlee: Yes!

Glenn: Why do you believe that?

Charlee: Because it makes the history come to life, to be real. Like in children's books, kids understand the story when they see a picture of it. So, it helps.

Glenn: Okay. Now the paintings--would they be of any value?

Charlee: Yes, because I think it shows, probably, what the soldiers were feeling than actually doing. It might capture more of the emotions. (Individual interview, March 28, 2005).

Charlee describes a painting in the following excerpt from her interview:

Glenn: It is a painting. Okay. Can you describe that? [You have said] that they are on a boat with a machine-gunner...

Charlee: Um-humh, and there is, it looks like, about close to 10 of them just surrounding the one gunner. There is only one of them who was actually shooting; the rest are just looking.

Glenn: Based on the picture, can you take a guess as to what it is they might be doing?

Charlee: Attacking, or, maybe, defending themselves from the Japanese.

Glenn: Um-humh. Okay. How are they dressed?

Charlee: In the regular uniform. They have their helmets on and their guns thrown over their shoulders. Olive drab.

Glenn: Do they look relaxed, or do they look uptight?

Charlee: They look kind of scared and uptight. The gunner is determined.

Glenn: And the gunner looks determined.

Charlee: Right.

Glenn: Is there anything in that painting that you think the artist captured really well?

Charlee: Probably their feelings and emotion, like, their eyes, [and] mouths (Individual interview, March 28, 2005).

Mike and I met to discuss a number of items with regard to the 112th Cavalry. During our discussion, I asked Mike to describe the differences between paintings and photographs as primary sources. This discussion followed:

Glenn: What can paintings do that photos don't?

Mike: At least in the World War II era photos, you could not really see the colors of, I guess, the colors of war. I guess, for some reason, paintings strike people more in terms of...they hit emotional chords with people more than photos do.

Glenn: If you had to defend the use of the painting like this, this particular painting, in a report that you were doing, would you argue that it is a primary source or a secondary source?

Mike: Well...it's...it's difficult to say.

Glenn: You're absolutely right.

Mike: It would be a primary source if you [the artist] saw two guys, like one guy grieving about his dead buddy, if you sketched it there. So, if he [the artist] sketched it there, then yeah. But it's difficult for paintings to be a secondary source. You can tell the story and you can see it in your mind, but you cannot tell someone how to paint. You cannot tell someone else how to paint it, especially if they don't have anything to look at. So, it's difficult for paintings to be secondary sources. But you can't really call it much of a [primary] source if he is just painting it to deliver a message.

Glenn: Okay. Here I have a painting by an artist by the name of Vidar, who was a combat artist [at Arawe]. It's entitled 112th Cavalry Patrol at Umtingalu (1943). Let's make a presumption that you accept that [painting] as a primary source. What would you trust in that painting and what would you not trust in that painting as far as a primary source is concerned?

Mike: As far as things I would distrust, it would be just the small details. You can't necessarily be sure that those soldiers were in those poses when the artist was drawing it. Or that the sky looked like that when the artist drew it. It almost looks like they're walking in a creek kind of thing, a giant puddle.

Glenn: Describe some of the things that you think are pretty trustworthy in there.

Mike: This [pointing] Japanese cannon which would be carted around by soldiers. Wooden wheels. World War I technology. The types of huts that they had, like lean-to's.

Glenn: What does it look like they are made out of, those huts?

Mike: Grass kind of stuff.

Glenn: Like thatched roofs.

Mike: Like thatched roofs. They have piles of brick which were probably for Japanese...piles of brick or clay which were for Japanese...like sandbag pits.

Glenn: Okay, let's go to the computer for a minute.  
[Glenn and Mike go back into the computer room, and Glenn brings up this painting on the computer.]  
Now we are going to take that same painting and expand it a little bit. Take a look at those bricks at a higher magnification.

Mike: They look like, I don't know, maybe boxes of something.

Glenn: Yeah. If there are big piles of boxes like that--

Mike: Ammunition or supplies.

Glenn: Right. Therefore, this place probably was? What would you call it?

Mike: A supply dump.

Glenn: Right.

Mike: And then this hut was probably used as a cover-up for air reconnaissance.

Glenn: Would you be able to count the number of boxes there and accurately determine how much the Japanese had stored there?

Mike; No. Not really.

Glenn: Why is that?

Mike: There is so much and the painting only limits what you can see.

Glenn: Do you think the artist is interested in that kind of accuracy?

Mike: No. More geography and just getting the point across of what was there.

Glenn: Take a look at the soldiers. How accurate do you think the artist was in portraying their weapons?

Mike: The painter wasn't looking into what weapons the soldiers had. Just kind of [the fact that they are] just soldiers and soldiers are going to have weapons.

Glenn: But it is accurate enough to tell what about the weapon?

Mike: That they were rifles.

Glenn: As opposed to?

Mike: Like a pistol or a machine gun (Individual interview, March 13, 2005).

I spoke with Juliet regarding photographs versus artwork as primary sources. In the following excerpt from our conversation, Juliet reflects, with regard to war, on the value of each when communicating for understanding:

Glenn: Now, do me a favor and separate the three pieces of artwork that you have from the two pictures [photographs]. What do the two photos have in common in terms of what the center of the photo is or what the theme of the photo is?

Juliet: Well, the photos concentrate on their camp, their buildings. I don't want to say buildings, really their tents. They don't focus on men who were fighting like the paintings do. When you are out fighting, you are out there with a rifle not the camera. The photos pretty much just document, "Okay, this is what it looks like where we are, just in case you wanted to know. Here's the destruction that happened afterwards." So, a little bit of before and after in the two different places.

Glenn: You touched on it, but what seems to be the center of the paintings that were done?

Juliet: The men and their actions, whatever they were doing. Like, in the first one, they are setting up camp and it's quite a lighter mood than the other two which are both really dark. The last one is particularly foreboding because you know they are just going to run into trouble. They know it too, but it is just a matter of when. The second two, ...have the men's features exaggerated. You obviously cannot do that in a photograph, but I think that is really important to convey the strong emotions that were going on there.

Glenn: You just touched upon something very interesting. At least in the five [images] that you chose, I won't say this is true in all cases, but at least in the five that you chose, you named some of the differences between photo versus painting. What is it that you believe paintings, or the paintings you chose, are really good at conveying?

Juliet: I think the artist can put whatever he needs, he or she needs, into the painting. He can add a few more people here and he can change their movement to so that it all seems to work together. It is not posed. I suppose, it's the use of color that is probably an important factor. You know, you can tell it is not photo realistic. The weird color just makes it seem, "Oh, well that's, like, perfectly real!" It isn't. I think the colors...there was a lot of black. There's a lot of black used and most artists steer clear of black because it is so dark, but I think it really works well playing off of the other colors too...

Glenn: And what are the photographs really good for that the paintings aren't?

- Juliet: They are good at showing exactly what it was like. You know, a picture speaks a thousand words. They can show all the detail that you might overlook if you were painting something: this broken chair here, this broken debris, this man casually smoking, or one man who is, kind of, standing there just, kind of, relaxing a bit in the moment. It's just very real. It's very stark and, kind of, almost shocking, because you can see just what the conditions were; it was a far cry from the normal American way of living.
- Glenn: If you wanted to tell the story of the 112<sup>th</sup> Cavalry, how important are the photos to telling that story?
- Juliet: Yeah, I would say they are pretty important, because they pretty much frame whatever place they were in at the time. It's a good frame of reference. I think it would be important to...see what kind of conditions they were in. Then you could see some of the paintings. I think they work really well together, but the photos really bring it to life because they are, pretty much, the starting point. It is just a window into the Southwest Pacific, exactly the way that it was.
- Glenn: We went through a large part of this project without knowing that the paintings existed. They were a relatively late acquisition. Now that you have seen the paintings, to what extent do you think that the paintings are important in telling the story of the 112<sup>th</sup> Cavalry?
- Juliet: I also think that they are really important. Just by my connections with art and my interest in that, I think they still have great meaning. Mainly because, you know, the artist did quick sketches of the moment there or you couldn't set up our camera shot, whatever, and then go back later and paint them. I think they convey emotion through the men's facial expressions and their hands. They convey that much better than these two photos that I selected, because it shows them in the heat of battle and the fear before it, which is something that could be lost in a regular picture if it is not taken the right way (Individual interview, March 30, 2005).

Later in our conversation, I showed Juliet the painting of the 112th cavalry patrol in Umtingalu (Vidar, 1943). As with several other participants, I asked her opinion concerning whether in the absence of a photograph it was better having a painting of Umtingalu than nothing. Juliet replied:

I think it is definitely better to have the painting versus nothing. With nothing, everybody could have their own interpretation of it. Obviously, a painting is an interpretation of whatever the artist sees, but he could not have imagined all of it. He must have had several reference sketches of what was really there. So, I think it is better than nothing. It may not be completely accurate, you know,



based on dimensions, or geography, or something like that. But it is better than nothing, because everyone can look at this painting and relate it to Umtingalu. So, everybody is, kind of, on the same page as to what it may have looked like (Individual interview, March 30, 2005).

### *War Diary Versus Newspaper Article as Primary Source*

As part of the interview process, I provided each of the six participants with two primary source documents. Each document provided an account of the 112th Cavalry's assault at Arawe on December 15, 1943. The first document was an excerpt from that day's entry in the 112th Cavalry war diary. The war diary, created in Japan in late 1945, had been put together by a team of 112th Cavalry clerk typists over a period of several days in response to a requirement from higher headquarters. It was compiled from data drawn from a variety of 112th Cavalry records kept during the war. The war diary was the official record of the 112th's activities and took the form of an objective source unburdened by explanation beyond the facts. The second document was an account of Troop A's attempted rubber boat landing as part of the Arawe assault plan. Written by Associated Press (AP) journalist Robert Eunson, who was in one of A Troop's rubber boats during the attack, the account (Eunson, 1943) was published in a number of newspapers two days after the assault. The article was the subjective view of a journalist embedded with a combat unit involved in a calamitous event. The journalist's objective was to bring that event to the reader in a way that would promote vicarious experience. By asking participants to compare the two, I hoped to capture their personally constructed understanding of a particular source and class of sources. In particular, I hoped to gain a better understanding of their thoughts with regard to subjective and objective influences on the source as well as the cognitive and affective responses of the reader.

The procedure was to provide both documents to the teenage interviewee along with 10 minutes in which to read them. Then, the participant and I would discuss the differences and similarities between the two documents. The conversation was recorded, and excerpts from that conversation follow this introduction to the activity.

Delta and I discussed the war diary's entry and the newspaper article concerning the attack at Arawe by the 112th Cavalry. I asked her to compare and contrast the two sources and the following dialog ensued:

- Delta: In the war diary, it states the facts. Like, "Okay, this truckload came in, this troop came in." And it actually had times and dates and how long it had been delayed. In the newspaper article, it is for real. Because the war diary was, like, "Okay, this took place during the landing." [The reader says] Okay, so? The article is like, "This guy saw someone drown and he was actually thinking how it would be better to be shot than to drown." I was like, "Wow! That actually happened to somebody. It wasn't just a story."
- Glenn: So if you had to summarize between the newspaper article and the war diary, how do they differ in the way they present the facts?
- Delta: Well, in the newspaper article, it is very descriptive of how the moon was shining and the paddles were loud. The article actually talks about how the enemy was wounding all of our soldiers and stuff. And, so, it portrays the enemy as being very bad. In the [war] diary, it hardly mentions the enemy at all. It says, "Okay, airplanes bombed the beach so that we couldn't land." It didn't really say how they were kind of messed up by all those bullets and stuff. It did not really explain how all the men died and how a lot of them suffered. But, it did show how one troop was kind of in need of help, and they tried to gather together and help each other out.
- Glenn: The one sentence in the war diary covers what that entire newspaper article is covering...How would you as a historian use each of those documents? What is each of those documents good for?
- Delta: The diary is the facts, like, this is true and this is what happened. We got all of our information from everybody. The article is, like, this one man's view of the battle. But, it is good because it actually has details and brings feeling into the event. I would actually like to use the diary more, because it is facts (Individual interview, April 11, 2005).

Charlee and I discussed the newspaper article and the war diary as they pertained to the assault on Arawe. Following is her response when I asked her to compare and contrast those two sources:

- Charlee: I think the article is good with elaborating on the facts at hand. The diary proves that that happened.
- Glenn: Okay, so the war diary can provide corroboration that what is talked about in the newspaper actually happened.
- Charlee: Right.
- Glenn: Now, the war diary is good at doing something else that the newspaper does not do as well. The newspaper pretty much talks about A Troop.
- Charlee: Right, the diary was everything that went on that day, not just one troop, but the whole regiment.
- Glenn: The whole regiment. Right. So, if you just read the newspaper article you would have a great human interest story, but we would be lacking what?
- Charlee: You would be lacking...the rest.
- Glenn: The rest! Excellent. That was a good answer. We would be lacking context. I think the war diary does a good job of letting us know why they were there.
- Glenn: Earlier in this project, I had each of the participants read a section of the war diary. What is your reaction to at least the section of the war diary that you had to read?
- Charlee: That was so long ago. It was very blah. It was, like, "We woke up at this time, ate breakfast at this time, cleaned horses. Repeat on this day. Movies every night." A very skeleton outline of everything.
- Glenn: A skeleton outline of what occurred. Okay. If you had to write a book or a movie, which would you rather have, the newspaper articles or the war diary?
- Charlee: I don't know. With the diary, you have something to start off with and then you can kind of add your own opinion. With the articles, you have a lot given to you; you can, like, portray it more accurately (Individual interview, March 28, 2005).

I discussed the same topic with Sierra, and what follows is the dialog of our conversation:

- Glenn: ...In your opinion, what is the war diary good for?

Sierra: Information...

Glenn: Of what kind?

Sierra: Telling what happened very factually, the basics. What happened at such-and-such a place at such-and-such a time.

Glenn: What is it lacking if it is lacking anything?

Sierra: It is just lacking, maybe, whatever it is that entices readers. It is not a novel that is intended to be a bestseller. It is information about what happened.

Glenn: It is a record--

Sierra: Yeah.

Glenn: --as opposed to a piece of literature or something like that. What about the newspaper article? What is that good for?

Sierra: That is good for reading something that is more likely to get you on the edge of your seat, as opposed to the war diary.

Glenn: They both covered the same event, but what is the difference between the ways they covered it?

Sierra: The war diary is, I said factual because I can't think of another word. This [the newspaper article] has words like "jabbering," "ripped," and things like that that are very descriptive and get you in the moment.

Glenn: Of the section of the war diary devoted to the battle of Arawe, how much of it is devoted to the A Troop rubber boat landing?

Sierra: One sentence.

Glenn: Right, one sentence. How much of the newspaper article deals with the A Troop rubber boat landing? You don't even have the whole article, but of the part that you have how much of it is devoted to the rubber boat landing?

Sierra: A good portion.

Glenn: Therefore, what have you learned about the difference between using the war diary and using first-person experiences of that same event? You may not have learned it now, you may have learned earlier in the project, or you may have learned a long time ago.

Sierra: Well, [first person] notes tend to be more personal, and they deal with what one person is going through as opposed to the war diary which is widespread and talks about each thing in a non-subjective fashion. It's just what happened, no partiality for anything. Whereas with personal notes, you're going to see what that writer went through (Individual interview, April 6, 2005).

Mike and I met to discuss the topic of newspaper versus war diary coverage of the A Troop landing at Arawe. Having read the two sources, I asked Mike which was the more interesting of the two:

Mike: The newspaper article.

Glenn: The newspaper article. Why is that?

Mike: The newspaper article seems like it has more feeling to it. More emotion. You just sense the excitement during the attack at Arawe, whereas the war diary is the facts and a very straightforward.

Glenn: Of the section I had you read in the war diary, how many sentences are devoted to the A Troop landing?

Mike: At most, like two.

Glenn: How much of the newspaper article dealt with the A Troop landing?

Mike: The entire thing.

Glenn: ...What does the war diary do better than the newspaper article if your desire is to learn about Operation Director [the 112<sup>th</sup> Cavalry attack on the Japanese at Arawe, New Britain].

Mike: Troop A is not all that important to Operation Director. Like in the newspaper article, if you were studying A Troop the war diary is the most useless thing on the face of the earth. You would want to use a newspaper article.

Glenn: ...What about if you're interested in what the overall regiment did?

Mike: The regiment as a whole, the war diary would still be kind of useful.

Glenn: What is the war diary most useful for?

Mike: Obtaining information on day-by-day kind of stuff.

Glenn: If you had a disagreement between several veterans who were interviewed for oral histories concerning when something happened, or how something happened, how would you resolve those disagreements?

Mike: The war diary.

Glenn: Which of the two documents, the war diary or the newspaper article, most closely approach the text that you get to use in your US history class?

Mike: ...The textbook is...it doesn't give boring facts like the war diary does, but it is also not the most interesting thing to read.

Glenn: Okay. Why do you think the war diary is so boring? Why are there so many boring facts in it?

- Mike: Because it is just the way that it is done; it is a very to the point. Like the things that it talks about, if you were to read them from a person's perspective you would find them very exciting, but just the way the war diary tells them [is boring].
- Glenn: So, an example would be, just read the two sentences about A Troop.
- Mike: "Troop A attempted to land at 0600 at the upper end of Cape Merkus. The landing was repulsed by a heavy machine gun fire."
- Glenn: Okay. Now, in the newspaper article, see if you can pick out the section which is an example of how almost anything that is a boring in fact in the war diary can be made interesting if you take it from a personal level.
- Mike: This is a little more interesting. "Corporal Homer C. Jenest of Wrentham, Massachusetts, crouched in the prow of our boat, Tommy gun in his hands. When the Japanese started firing, he emptied his gun and then jumped overboard." It shows how when the machine gun started firing how people reacted.
- Glenn: Okay. Given that, what is the entire perspective of the A Troop perspective from? Who's perspective is that from?
- Mike: The Associated Press...
- Glenn: Bob Eunson, the Associated Press correspondent. It is his view--
- Mike: Right.
- Glenn: --of what occurred. Is there somebody's point of view which is in the war diary?
- Mike: Almost never (Individual interview, April 16, 2005).

During an interview with Victor, I had him read the newspaper article and the war diary entry regarding the 112th's activities on December 15, 1943. What follows is an excerpt from our discussion:

- Glenn: You have read two different documents and each describes something about the 112<sup>th</sup> operation at the Arawe landing on December 15, 1943. If we take the war diary, how much of the A Troop operation with the rubber boats does it talk about in the war diary?
- Victor: ...In two sentences.
- Glenn: How is the A Troop rubber boat landing handled in a newspaper article?

Victor: It is actually a personal experience; it is a journalist's thoughts about what he did. Basically, his whole experience from beginning to end and everything that happened to him and the people he saw around him.

Glenn: Which was more interesting for you to read?

Victor: The journalist.

Glenn: The journalist. Why is that?

Victor: Because you can actually...you can experience war through his writing.

Glenn: He is trying to achieve what goal for the reader? What is the goal in his writing?

Victor: Sort of, have them feel the fear that he went through and the anxiety and the anguish of the whole experience.

Glenn: Okay, to try and explain the experience to the reader. How is that different than the war diary?

Victor: The war diary is just to, pretty much, tell everybody that there was shooting.

Glenn: Well, I believe you read a section of the war diary last fall. I handed out sections to everybody...What is your opinion of the war diary as far as reading is concerned?

Victor: It is extremely boring.

Glenn: Extremely boring. Why is that?

Victor: It just, basically, sums up whole events in just one sentence. "They walked out, they got shot, two people... It's just done plainly and with no feeling, at least not much.

Glenn: Okay. So, the war diary has no feeling and is pretty factual.

Victor: Um-humh.

Later on in the same interview, I revisited the topic of the war diary with Victor:

Glenn: At this point, I would like you to put on your historian's hat as opposed to your teenager's hat. If I were to say that all of you [participants] found the war diary extremely boring and that if this [project] were ever to be done in the future, I would toss that out and not even show it to the students because it is so incredibly boring. What would your response be?

Victor: Well, even though it was boring, I guess, it helped. There was just so much that they did, that the war diary seems like the only way you can really summarize everything they did. The personal experiences are so long that you really could not cover the whole course of the 112th's history. The personal experience would be massive. The

war diary is, sort of, like a summary that's necessary to basically understand what happened. Then, later, you can go into the personal experiences and understand specifically what happened in certain, more important places (Individual interview, April, 9, 2005).

In the following excerpt from her interview, Juliet compares and contrasts the two forms of textual evidence about the Arawe assault:

Juliet: In the war diary, it describes, you know, play-by-play not second-by-second. It is, kind of, a basic summary of, 'Well, they fired, then we've fired, we shot them and blah, blah, blah.' What is especially interesting is that it summarizes the rubber boat incident in two sentences. "Troop A attempted to land at 0600 at the upper end of Cape Merkus. The landing was repulsed by heavy machine gun fire." And that's it. I just think, "What?" It was such a significant event, it is strange to see it so coldly described.

Glenn: In two sentences.

Juliet: Yeah, just so frank.

Glenn: Contrast that with the newspaper article you read, or the portion of the article you read.

Juliet: In the article, the man who was the correspondent was actually in the rubber boots with A Troop, he goes by exactly what happened. He fell off the boat and tried to help this other guy, but the other guy died. A bullet comes past him and hits his typewriter, et cetera, et cetera. It goes into so much more depth and is so much more real. He tells exactly what happens, with emotion. He says that he was pretty sure they would all come out of that. It was probably really surreal. But he's got such a personal voice, whereas the war diary is just so... I want to say cold. There is no personality to it. It's fine because they are both primary documents, but the war diary is looking at it from, you know, the military's perspective. The article is looking at it from the men's personal reactions, sort of.

Glenn: Just taking that one incident and just taking these two primary source documents, what can you learn as a history researcher, from comparing and contrasting those documents, that deals with, maybe, what one is better for and, maybe, what the other is better for?

Juliet: I think it is important to realize, like, that the [war] diary is strictly business. There is no time for, you know, personal responses. It is like writing down all of the moves in a chess game, or something; it's not the thought process behind them. That is, kind of, what the column is. The column is important so the historian can get as much emotion out of it and understand just what was happening, how the men reacted, [and] how things looked. [It has] far more vivid imagery



in the article rather than the war diary. The war diary is important because it completely takes out anything that you can say is biased from a personal standpoint. It says so matter-of-factly that they were, you know, “repulsed by heavy machine gun fire.”

Glenn: ...From your perspective, which of those two [primary sources] do you get more out of?

Juliet: I would say the article, because he tells you in really vivid terms about how the sea was, who so-and-so was, “there was a bright moon shining when the sailors threw our boat into the water.” It reads like a story, but it is real. It elaborates so much more than what is in the war diary. So, I think it is a better source (Individual interview, March 30, 2005).

### *Comparing and Contrasting Primary Source Images to Documents*

As part of the individual interview process, I had each expedition member engage in an intellectual exercise involving matching. Participants were asked to match the photograph and the painting to the document type (war diary or newspaper article) which exhibited similar qualities. After they made their match, I asked them to explain their rationale. There were no right or wrong responses. Instead, I was interested in gaining a better understanding of how each participant viewed the four categories of primary source used in the interview: record (war diary), narrative (newspaper article), photograph, and painting. By requiring participants to voice their rationale, I hoped to capture their personally constructed understanding of a particular source and class of sources.

When asked to compare the two, Victor responded, “The war diary is to the photo as the painting is to the journalist’s writing.” His rationale for that comparison was, “The war diary is all facts and the picture [photograph] is more specific detail. The painting shows emotions and mood and the journalist shows his emotions and mood.” I followed up on his response and the following exchange took place:

- Glenn: As long as we are on mood and feeling, in the project, so far, you have worked with oral histories, photos, paintings, and newspaper articles. At least in your case, because you are working with animals, you have worked with a number of Army reports and Army histories and that sort of stuff. Out of all of those, which have you found the most enjoyable to work with?
- Victor: The personal. Like people telling you about their experiences with animals and how they did stuff.
- Glenn: Why do you find that interesting?
- Victor: First, it is easier to understand, and I can more, like, imagine it happening. When you can see it happening, you can sort of copy down the facts and use that (Individual interview, April 9, 2005).

When asked the same question a week earlier, Sierra responded similarly by matching the war diary with the photograph and the newspaper article with the painting. As Sierra explained, “Both the war diary and the photograph are exact replicas of what went on, whereas the article and the painting display character and emotion and have thrill built into them.”

My interview with Delta led to a slightly different comparison. Delta initially matched the newspaper article and the photograph together. When I asked her rationale, she responded that each was the more detailed of its document or image category. Then, she changed her comparison and grouped the photograph with the war diary:

Because of the facts. There’s nothing really interesting a whole lot in either of them. I mean, the photo is really interesting but it is not like, “Oh! My gosh! That is really captivating to look at!” You kind of, like, just glance over it (Individual interview, April 11, 2005).

In her rationale for grouping textual and image based sources in particular pairs, Juliet provides insight into her constructed understanding of the various sources:

- Juliet: I would say the newspaper article is to the painting as the war diary is to the photograph.

- Glenn: Whether I agree or disagree with that, what is your reasoning behind that?
- Juliet: Well, the photograph shows exactly what it is. It is what it is. Just like the War Diary just captures a moment. It doesn't have anything exaggerated. Whereas the painting, it's...it's more colorful, and it's more expressive, especially of the men, in this case, who are just lounging around. But I feel like it [the painting] is more the perspective of the men and their personal feelings toward the war, just the way the newspaper article is about the men's personal experiences in the rubber boat landing. You know, the photograph says matter-of-factly, "This is the band here in the big field." Just as the war diary says, "The landing was repulsed by heavy machine gun fire."
- Glenn: I guess the other thing that I am struck by is that we spoke about the artist's freedom to interpret in the artist's painting. Is that also true in a newspaper article? The author, Bob Eunson, to what extent does he have the ability to interpret [his story] the way an artist does?
- Juliet: I think he has the same ability to interpret his own facts and his own reality, because he can...he has got his own personal viewpoint of the entire event. Only he can tell exactly how he interpreted it and the way the article could. What we read is...his diction and style of writing is in a clear voice. If someone else were to write it, it would be different, but I would still be the same event. Just the way as if somebody else painted it, or took a photograph, it would be different than this painting here (Individual interview, March 30, 2005).

### *Differences between Expedition History and School History*

Until the teenagers became involved in the HWB history expedition to research the story of the 112th Cavalry in World War II, their exposure to historical research consisted of their experience in school. As part of the project, I was interested in finding out from the expedition's participants how they felt the expedition method compared to their experience learning U.S. history in school. During our interviews, I asked that of my interviewees and, by way of calibrating their responses, I also asked what type of U.S. history they were studying: Advanced Placement (AP), honors, or regular U.S. history. Regular U.S. History is defined in Texas by Section 113.32 of the Texas Essential Knowledge and Skills (TEKS), effective September 1, 1998, as United States

History Studies Since Reconstruction. The responses of the teenage participants appear below.

In my interview with Juliet, I asked her to compare the history expedition experience to that of learning history in school. Her response was clear, and I moved onto another topic. However, in her response to a question dealing with the second topic, she provides more information regarding her school experience. I have included the full excerpt of our conversation.

Glenn: What social studies course are you taking this year?

Juliet: Regular US history.

Glenn: Of the newspaper article, the excerpt from the War Diary, the black-and-white photo, and the painting, which of those do you think are most like what you are working with--in terms of materials--in your school program?

Juliet: The War Diary reminds me of history textbooks--quite boring. [she chuckles] The textbook will summarize the Cuban Missile Crisis in a mere paragraph, which is just [Juliet uses her hands and face to express the message "Is that all there is?"] if you know more about it. Like, if you had read this article [about the A Troop attack at Arawe] and you know so much about the rubber boat landing and then you see these two sentences that talk about it [in the War Diary], you're like, "You are really missing out here." A history textbook would be more cold, not taking a stance, not allowing for personal interpretation or expression. So, it would be more like a photograph or the war diary.

Glenn: On to a completely new topic--oral histories. What was your experience reading the oral histories that you did? You read some oral histories, you read some War Diary, you have read at least one newspaper article, and in your research on your topic you have probably read a couple of magazine articles and gone through some records of the 112<sup>th</sup> Cavalry. In your opinion, what do the oral histories bring to the table in addition to all of those other sources that we were looking at?

Juliet: Well, the personal experiences, because they each had a different experience. Each of them had a different role in the war, and they remembered those funny, strange, or interesting stories that the textbook would overlook. They [the textbook company] would cross it out as superfluous information, but the oral histories are very

personal and their personal voice comes out, because it is exactly what is on their mind. It is what they remembered from the war and how they remember it is exactly how they interpreted it. So, I think is important to read all of those, as well as the other more boring things so that we can get our own hypothesis of what it was like (Individual interview, March 30, 2005).

In my interview with Delta, she identified that was taking regular U.S. History in school that year. Her comment regarding how the expedition compared to school was:

Well, here we are actually reading stuff and we have things in our hands. In regular history, we don't really have to read anything. [We do not do anything] except listen when he's teaching to what he has to say. The primary sources here actually have a lot about World War II, like the Driniumor River. In regular history, it's, like, 'There was a war. It happened in Europe, and it was in the Pacific. That was it. We won.' This goes into more detail, more feeling, more reality (Individual interview, April 11, 2005).

In the following dialog between Charlee and me, Charlee describes her experience in her school history class:

Charlee: Well, in history in the school we just go for the full, broad picture. If we are studying World War II, we talk about every country and nation's leader; we don't talk about the armies and the smaller regiments and stuff like that. We just talk about the important people, important events, the day it happened [the war began], and the day it ended. Then, move on.

Glenn: ....What are the primary tools you use to learn from in school?

Charlee: The textbook, and, in our class I'm not sure about others, we watch movies recorded from, like, the History Channel.

Glenn: Are you in an honors course, or an AP course?

Charlee; Regular.

Glenn: Okay. Without getting into your opinion of whether this is good or bad, or whether you like it or don't like it, I'll simply ask the question. How often do you get to work with primary source materials in school?

Charlee: Probably never, really...I mean we have books to look at, but not the actual...where the books came from, like the actual file or a facts. [It's] pretty much a secondary [source material].

Glenn; ...If you use the secondary stuff, you can cover a lot of ground quickly. Is there bad news to secondary source material?

Charlee: It often comes, probably, from the author's personal view, and not the actual thing (Individual interview, March 28, 2005).

My conversation with Mike elicited a short answer in which he said the expedition method required understanding, not simple knowledge. I pursued that statement regarding understanding and present it as part of his comments on school versus expedition methods of learning.

Glenn: ...How does the 112<sup>th</sup> Cavalry project differ from the history that you do in school?

Mike: We have all whole lot more field trips! [chuckle] You learn more about, like, the history of the 112<sup>th</sup>. In school it's like, "Well, here are your facts that we are going to teach you so you can hopefully pass the test if you pay attention." Here [in the 112<sup>th</sup> project] the test is do you understand it and can you read about it and write about it.

Glenn: If I told you that a reporter was going to interview you about the project, and they said, "You just used the word understand, or understanding, in reference to this project as opposed to getting a grade in school. In terms of the 112<sup>th</sup> Cavalry project, in your opinion, what does understanding mean to you?"

Mike: You would have an understanding of the weapons, the uniforms, all of the equipment, the geography of the area, where the soldiers came from, like what was going on there. You would have an understanding of different paintings or interpretations of what was going on at the various places.

Glenn: Okay. One of the topics you are specifically dealing with is weapons. Although that individually may not be the most important part of what you're doing, it is an area you are specifically dealing with. How does your understanding of the weapons in a typical 112<sup>th</sup> Cavalry squad differ now than before you started the project? Let me say for the reader that the weapons we are talking about are the M1 rifle, the M1 carbine, the .45-caliber Thompson submachine gun, and the Browning Automatic Rifle [BAR]. How does your understanding of those weapons differ now from when you started the project?

Mike: I don't think it is different that much, because I knew a lot about them from various other things that I've learned in the past. I think the only thing would be the sound of them. What they sounded like.

Glenn: Where did you get to learn that?

Mike; We learned that down in Fredericksburg [Texas] at the...what was that?

Glenn: At the Museum of the Pacific War. You are talking specifically about the firepower demonstration they had down there--

Mike: Right.

Glenn: --I believe they call it Island Assault. Why does that remain in your memory?

Mike: Because it was a visual thing. When you read stuff from magazines or the war diary, you can read it and you can know every single fact and detail, but you cannot see it and you cannot hear it.

Glenn: And the seeing and hearing helps you improve your knowledge in what way?

Mike: So that you can tell people what it is like. If you read an oral history, you can understand what they are talking about; you can picture it in your mind.

Glenn: So, between the knowledge you already had about weapons before we started and the knowledge you gained while we were down at the firepower demonstration, both of those tied together gave you a better ability to understand what might have been said in the oral histories.

Mike; Um-humh.

Glenn: Your understanding of weapons--and now in addition to the M1 rifle, the M1 carbine, the Thompson submachine gun, and the BAR, we will add the .30-caliber air-cooled machine gun that was often available in the squads--how does that help you in your understanding of why the 112<sup>th</sup> did things a certain way?

[Mike thinks for about 20 seconds]

Glenn: Let me help clarify that a little bit. A number of the veterans in the interviews talk about patrols and where different weapons were in the line of the patrol. How does your knowledge of weapons help you better understand what the veterans were saying?

Mike: If they say they went out on a patrol with their M1 rifle, it's kind of weird to hear that unless the patrol was solely to search for the enemy who were at a far distance--to shoot at them from a far distance--because a rifle is just that, a long-distance weapon, not too long distance, but long-distance enough. It would make more sense [on their usual jungle patrols] to go out with a Thompson submachine gun where if you run into an enemy close enough to see them, pretty close, it's a close range weapon.

Glenn: Why was that important in the places the 112<sup>th</sup> was operating?

Mike: They were operating in areas with fields of view of sometimes, like, three feet ahead of you.

Glenn: What was that caused by?

Mike: Jungle.

Glenn: Right. So, they were in the jungle where the fields of view are very close and what you could really use, as you pointed out, is that if an enemy pops up five feet in front of you, or begins to fire five feet in front of you, the rifle may not necessarily be your best companion. In your opinion, what would the best companion be?

Mike: Like a Thompson submachine gun--especially if you cannot see them. A .45-caliber pistol if you can see them and they are close enough (Individual interview, April 16, 2005).

In my first interview with Sierra, as was so often the case, she provided a parsimonious response to my question:

At school, you don't have a choice. You do it and you get a grade and you have to follow a certain format to get a proper grade. There are certain guidelines you have to go by. In this project, you go into it yourself; it is voluntary. You spend as much time with it as you want, and you take out of it what you personally get out of it (Individual interview, April 6, 2005).

One week later, during her second interview, Sierra provided me the following question as one she would like to answer: How has this project differed from everyday school classes that you encounter?

Sierra: Well, primarily it's mainly outside of class, so it's on your own, as opposed to schoolwork where you do a worksheet, turn it in, and get a grade. This is more that you do what you can and you get a response from it. It is more individualized.

Glenn: Which, in your opinion, proves to be more beneficial?

Sierra: I think this method does because in school you do not really know, like, if you're on the right path. You don't know whether it is right or wrong. You do not know how to correct it or how to improve it. This, I guess, provides more direction.

Glenn: Let me dig a little deeper into that. I can easily see how in class you just know whether it is right or wrong. In this project, how do you get your feedback that you're on the right track?

Sierra: I guess, just through your advice whether it be e-mail, or in person, or just jotted down like on an outline about what we need to go delve into more.



Glenn: Do you find that to be more beneficial than just learning whether it is right or wrong as you would in class?

Sierra: Yeah, because otherwise you cannot fix it; you just know that it is wrong, and you do not know what to do to make it right (Individual interview, April 13, 2005).

Victor provided an interesting insight into his view of doing history in school versus doing history as part of the expedition:

Glenn: From the perspective of being able to choose your own area of specialization [in the project], is that the same way it would work if you did a history project in school, or is it different in this project?

Victor: I wouldn't have been able to pick out my own area in school, I don't think. I think I would probably just have been assigned a specific topic along with everybody else in my class. I would then have my essay compared to others.

Glenn: When you do this kind of research in school, what is your personal goal when you are writing a research paper for social studies? That is, assuming that somewhere they have asked you to write a research paper in social studies. If you were assigned a research paper...what would your personal goal be in completing that paper?

Victor: Honestly, I first try to figure out what I know the teacher wants to hear and, then, based upon what I know the teacher wants to hear, I write down that information and I compile it into an essay that I know will get a good grade.

Glenn: I think that is a very wise strategy! [Victor chuckles] How is your motivation in this project different than that?

Victor: I'm putting in information I know, based on the animals, that if I was reading this book I would want to hear, and that I would find important, relative to the subject, and not just, sort of, here because the teacher wants it and to get a good grade. So, the information I find important.

Glenn: ...What is your primary source of information in your classroom?

Victor: It is usually either the book, the US history book they provide us with, or the Internet.

Glenn: How did your US history course treat World War II? How is that different from the way we are treating World War II in this project?

Victor: [laughing] Basically, in US history you go over World War II in a single chapter. They basically throw out some quick facts like: the war happened, this battle happened, this happened. Trust us, believe us, and just memorize it and get the tests over with. They cover the

entire World War II in one, or maybe, two chapters, at most, as opposed to this [expedition] where we are going into specific details like what really happened. So much has happened, that I think it's nearly impossible to cover everything. There is so much detail that you can go into. We are really going into more of a deep understanding of what happened. As opposed to just battle names and dates, [we learn] what it was like, the people, the times, the experiences, and the animals [chuckling] (Individual interview, April 16, 2005).

### *Problems and Difficulties Encountered by Participants*

The following excerpts from the individual participants reveal a variety of issues they had to deal with as part of the expedition experience. Victor addressed the issues of time management and identifying significant information within his data;

I would have to say that there were a lot of time management issues: trying to get all of my interviews read in addition to all of my schoolwork, figuring what I wanted to get out of certain interviews, and remembering them later on. Recording them. Just getting the resources I wanted for my research and not just excess stuff that I did not need at the moment (Individual interview, April 16, 2005).

In addition, when asked if jargon was an issue, Victor responded:

Yeah, when they [the veterans] would try and explain different procedures or steps. There were, like, several times when they were trying to explain how to clean a saddle or a horse. They had all of these different terms, I guess, that were common during their time on how to do certain things. I had no clue about what they were talking about, so, I would just sort of try and figure it out from pictures. Their technical terms were trouble for me (Individual interview, April 16, 2005).

Delta was concerned that she was not keeping up with the reading and that she was overwhelmed by the amount of data regarding her topics. When asked to identify the toughest part of the project, Delta responded:

Reading everything you give us! And then writing a summary. I don't even keep track of how long it took me to read anything. But getting through everything...the war diary. I don't even want to get through the war diary (Individual interview, April 11, 2005).

Later in the interview, when asked what her biggest concern was regarding the expedition, she responded:

I can automatically answer that. It is getting this thing done. Because so far, like, this one little sheet that I have done, right here, is all I have done. I did not realize how much stuff there is. And then I had my Advanced Placement English class and my college entrance essay to write, and I was, like, "Wow! I have a lot of stuff to do" (Individual interview, April 11, 2005).

### Team Meeting 8

Team meeting 8 took place on April 17, 2005. It was a watershed event in that it was the first time in eight months that a planned intervention took place with regard to shaping the process by which the teenage participants engaged in history. It was a direct outgrowth of the individual interviews in which various expedition participants spoke of primary sources as being "true," the role of historians as finding "the truth," and that history as a process consisted solely of compiling testimony from primary sources. The intervention was designed to lead the participants through the process of constructing a historical understanding in a manner similar to that of a historian. The historical topic of the intervention was A Troop's abortive rubber boat assault against Arawe, New Britain, on December 15, 1943.

#### *Intervening to Improve the Process*

The intervention consisted of distributing a number of authoritative documents to the teenagers which dealt with A Troop's landing. That several of the documents contradicted others, contained factual errors, or were biased, was an important part of the intervention. Each teenager had the job of reading the document assigned to him or her, summarizing the document's contents, and, based on the document's content, communicating their understanding of the event to their peers. After two-and-a-half hours of discussion and problem solving, the teenagers were beginning to understand

the processes of corroboration, source analysis, bias identification, contextualization and plain old fact checking. The teenagers, having identified the major disjoints between the sources, were trying to understand how such eminent authorities could get the story so wrong. The following dialog captures the learning taking place as part of a Socratic dialog:

- Glenn: So, here is my question. In one particular area, we have different accounts. [We have] newspaper accounts from the New York Times, Newsweek magazine, Time magazine, we've got memoirs that were written by Admiral Barbey, General Kenney, and we have the official histories written by Admiral Samuel Eliot Morison. We have a ton of other stuff, plus we have official documents from the National Archives and places like that. Is it reasonable to expect that there is going to be disagreement between sources about what happened in an event?
- Victor: Yeah.
- Glenn: And why is that?
- Mike: Some of the things were estimations, different experiences, and different people.
- Glenn: What is it the job of a historian to do?
- Juliet: ...To cross reference everything and to see which one gets, I don't know, the most accurate...
- Glenn: Okay. So, you cross-reference amongst the sources and try and figure out which ones might be right....Is it your job to let people know that there is disagreement, or is it your job simply to say, "This is the way it happened."
- Mike: You can do both. [You can] show that there is disagreement and that there is probably as close to the truth as you can get.
- Glenn: Okay, because what do you accomplish if you come out and tell the reader right off the bat that there is disagreement?
- Mike: They will think that your information will be kind of contradictory about itself.
- Glenn: Okay. They will know that some of your information may be contradictory. If you show them how you sorted it out to gain your approach, what does that allow them to see?
- Victor: The logic behind your facts.

Glenn: The logic behind your facts. If you really do let them know what the conflicting evidence is they may choose their own approach to study that evidence, but at least what are you equal on?

Juliet: Showing them everything. Everything that everybody said.

Glenn: Right. Showing everything that everybody said. You can both start with the same basic facts and note that there will be different interpretations, but at least the same facts are out there. Some issues are easier to sort out than others. What could be the confusion between 35 yards and 100 yards?

Mike: Oh, ummm, they did not all go in a straight line. [Mike motions with his hands to show a first, second, and third wave of rubber boats.]

Glenn: Okay, so maybe they did not follow a straight-line.

Mike: You don't know whether they are talking about the rear.

Glenn: Right. In fact, one of the newspaper articles talks about how there were three waves of five boats per wave. So, that could be one of the differences. The first wave may have been 35 yards and another wave may have been 100 yards. What else--yeah, Juliet?

Juliet: Maybe, somehow, it was lost between all of the levels [of command]. They meant 100 feet [35, or so, yards] not 100 yards.

Glenn: What sometimes gets lost in translation is that maybe it was 35 yards, or about 100 feet. That is another easy mix up. So, those are the kinds of things that we have to try and sort out for the reader, and those are the kinds of things that the reader expects us to provide them with....A lot of you are looking for specific answers. A lot of you are looking for, "If I only had this piece of information, I could prove what is going on." Very infrequently will you find that piece of information. Instead, what are you going to have to think through?

Mike: What is reasonable.

Glenn: ...How do you determine that?

Mike: Like...two dots make a line and three dots make it more...If two things are conflicting, find a third thing or source and that will make it more accurate.

Glenn: Okay. Good! How has the exercise we just went through on your piece of paper in any way changed how you look at what your role is as a researcher in this project?

Juliet: You just can't stop at one document to take information from. You have to look through the entire gamut of documents even reflecting a single incident, just so you can discern what is right...

Sierra: Bias.

Glenn: Bias, and why the bias might be there.

- Victor: It depends upon their situation...
- Mike: What they achieved or did not achieve.
- Glenn: Especially if it is after-the-fact, there will be a tendency to do what?
- Mike: To exaggerate your success (Team meeting, transcript excerpt, April 17, 2005).

### *The Phenomenon of Spatial Chronology*

As the expedition progressed and my co-researchers discussed their various understandings of the 112th's experience during World War II, I noticed an interesting phenomenon. Whenever a discussion took place in which the teenage participants were discussing when a particular event took place, they always described the "when" as a "where." In other words, dates were infrequently used by the teenagers in their discussions of the 112th Cavalry. Instead, where the regiment was located at the time in question was the chronological signifier. In order to capture the phenomenon, I engaged the team in an activity during the meeting. Having spent much of the meeting talking about the 112th's operations at Arawe, New Britain, I was aware that the teenagers had repeatedly been exposed to the fact that the assault took place on December 15, 1943 and that the official length of the Arawe battle extended from December 15, 1943 until February, 10, 1944. In addition to hearing those dates, they were written in black ink on a bulletin board 10 feet in front of the seated teenagers. I gathered five images of the 112th Cavalry during World War II several of which were used in the individual interviews earlier in the month. At an appropriate time during the meeting, I said we were going to start a new discussion. By way of introduction, I said,

Now, I'm going to show you several pictures and what I want you to do is tell me when you think these pictures were taken. You are going to have to define what I mean by when; I am not going to tell you. I'm just going to say that you determine what "when" means. I want you to go through these five pictures and tell me

when you think they were done (Team meeting, transcript excerpt, April 17, 2005).

As the five pictures went from hand to hand, the teenagers provided responses such as, “in the States,” “My guess would be New Caledonia,” “It could be the Louisiana Maneuvers,” and “at Arawe.” After they had finished their task, I engaged with them in the following dialog:

- Glenn: Okay. Each of you described the photos, pictures, or paintings in terms of what? I asked for when, and you described it in terms of what?
- Victor: Places and events?
- Glenn: Places and events. Why?
- Mike: [Facetiously] Because we don't know the dates?
- [laughter]
- Juliet: We associate the time period with where they were. So, we just think of what they were doing before we think of the time.
- Glenn: Okay. We just spent an hour-and-a-half talking about this day [holding picture of A Troop survivors at Arawe].
- Mike: December 15, 1943.
- Glenn: [Pointing to date on butcher paper that has been in sight during the entire questioning process concerning the paintings and photos.] Is it up here?
- Attendees: It's up there!
- Glenn ... in your mind is it as appropriate, or even more appropriate, to talk about the event or the place they were as opposed to the date?
- Juliet: It seems that a date is just a number and to me I just, kind of, see it, like, out on a timeline. Very boring and very dry. But, that's how I think of it. But I think a place...a place just looks more...pictures in my mind. I do more kind of photographic types of thinking. But we know it is, like, a string of events, and to me it doesn't matter as much whether it was December 15 or January 15, or whatever. Just that it happened and how it happened than when it happened.
- Glenn: Okay. If you are talking about events in one battle; if you are talking about the events at Arawe. How important are dates?
- Juliet: Pretty important.
- Glenn: Pretty important. It went from December 15th [1943] until, officially, February 10th [1944]. So, if all you're talking about is Arawe, to get

any kind of chronological order in there, you almost have to use dates. But, if you are talking about their progression of battles during World War II...well, maybe dates become less important. What becomes important timekeeper?

Juliet: ...Where they were.

Glenn: Where they were, what they did, and the events they were involved in (Team meeting, transcript excerpt, April 17, 2005).

### 112<sup>th</sup> Cavalry Day

During a meeting of the expedition in March 2005, several of the teenagers discussed a news report that the Texas House had approved a bill “recognizing the Battleship Texas on the occasion of the 60th anniversary of the raising of the U.S. flag at the Battle of Iwo Jima.” We used one of the computers in the work area to access the Texas legislature online and retrieved a copy of the legislation (see Appendix N). We looked at the legislation for the USS Texas and Juliet asked, “If they can do this for a battleship, do you think they would do it for a Texas National Guard cavalry regiment?” With that was born the idea of 112<sup>th</sup> Cavalry Day.

My co-researchers and I spent approximately one hour talking about the possibilities of a 112<sup>th</sup> Cavalry Day. I realized this was an opportunity for the team to become involved as citizens within their own state and propose legislation. Knowing nothing about the process, we looked it up on the Web page provided by the Texas legislature (Texas Legislative Council, n.d.). Once in possession of a document describing the legislative process, we knew what was ahead of us. I asked the team to come up with a plan of what we would need to do to make a 112<sup>th</sup> Cavalry Day a reality based on the legislative overview in their hands. Juliet said, “We need to know what it is we want to say.” Charlee said, “My family knows our local state representative. We can try and submit it through her.” Mike asked, “What are we going to choose as the day?”



Delta observed, "Should we be doing this? What about the 112<sup>th</sup> Cavalry guys, are they going to be mad that we're doing this? Or, won't someone else, like, the National Guard get upset at us?" I said, "You know, you are all right. Let's talk this through."

We talked as a group about our options in creating the draft legislation. In our talk we discussed alternative courses of action and the possible ramifications of each. We decided that Juliet and I would tackle the text of the draft. We would use the bill regarding the USS Texas as a template, simply replacing much of what was said in the bill concerning the USS Texas with information regarding the 112<sup>th</sup> Cavalry. We would use the short history of the 112<sup>th</sup> Cavalry posted on the Texas Military Forces Museum (Texas Military Forces Museum, n.d.) Web site as our informational guide. Created by veterans of the 112<sup>th</sup> Cavalry, we felt they would agree with the information if we placed it in the proposed legislation. As needed, we would generate information ourselves that was not on the Web site, such as the list of firsts the 112<sup>th</sup> was involved with as well as its transformation post-war to the 112<sup>th</sup> Armor.

With regard to the date for 112<sup>th</sup> Cavalry Day, we decided it could be one of three possible days. The first date was September 2, 2005, the 60th anniversary of Japan's surrender. We felt it was an appropriate date since several of the veterans had commented that they were aboard the attack transport USS *Lavaca* that momentous day in Tokyo Bay. The *Lavaca* was anchored close by the USS *Missouri* as the surrender ceremonies took place on the *Missouri's* deck. The second possible date was November 18, 2005. That would have marked the 65th anniversary of the federalization of the regiment for service in World War II. The third possible date was January 17, 2006. That date would commemorate the 60<sup>th</sup> anniversary of the 112<sup>th</sup> Cavalry's return

to the Texas and deactivation as a cavalry unit.

The concerns raised by Delta were very real and entirely valid. The following conversation ensued as we discussed the issue:

Glenn: You know, my wife and I are going to replace the fence around our property. We are thinking of making it wrought iron instead of wood. She is concerned that it might get our neighbors upset. Can any of you figure out why it might get the neighbors upset?

Mike: Yeah. Because they would have to see you in your swimsuit!

[laughter]

Juliet: Because here in Texas neighbors usually share the cost of a fence. They would have to pay for it.

Victor: Their dogs would get through it too easily.

Delta: Because it changes the view for everybody.

Glenn: You are all correct. So before the ironworkers arrive to install our fence, what should I do?

Juliet: Talk to them.

Sierra: Resolve any issues before you commit to anything (Investigator's journal, March 26, 2005).

Based on the above conversation, we decided as a group that the best approach was to coordinate with other stakeholders before we sent the draft legislation to our representative.

The initial draft legislation requested the Texas legislature designate September 2, 2005, as 112<sup>th</sup> Cavalry Day in Texas. We e-mailed copies of the draft legislation to the chief historian of the Texas National Guard at the Texas Military Forces Museum, the legislative liaison between the Texas National Guard and the Texas Legislature, and several members of the board of the 112<sup>th</sup> Cavalry Association. The chief historian of the Texas National Guard advised that too many things would be taking place on September 2, 2005, and that the legislature might not be interested in singling out the day solely for the 112<sup>th</sup> Cavalry. Other than that, he felt the draft

legislation was fine. He suggested we make sure it was coordinated with the liaison between the Texas legislature and the Texas National Guard. That liaison officer responded that he was fine with the draft legislation, but that we needed to work expeditiously. He commented that we should make sure we connected with the chief historian of the Texas National Guard. The following message came from an officer of the 112<sup>th</sup> Cavalry Association:

I think the whole thing is great! Unfortunately, we have not had any board meetings recently. I haven't made copies and sent it to anyone but I am certain they will be delighted as well. I will forward your email to some of the gang... but I do not think you should hold up doing anything waiting for any of us to get back to you! Please tell YOUR Troops that we will notify OUR Troops via some email and in the newsletter...Everyone will love the idea, I'm just sure....I will look forward to hearing how things go and I will get the word out!!! (Officer of 112th Cavalry Association, personal communication, April 4, 2005).

Based on our coordination with stakeholders, we felt comfortable we would have their support. I asked the teenagers which of the two remaining dates we should use for our draft legislation since September 2, 2005, seemed a non-starter. We agreed on January 17, 2006, for no other reason than the alternative date was a Friday in November and would be a football night across all of Texas. Being in their high school marching band, none of the participants would be able to celebrate the day as they prepared for the game. And, so, on such, what for some would be trivial, grounds the decision was made.

Five days after the topic first came up, we submitted this draft resolution to our local representative to the State House:

#### CONCURRENT RESOLUTION

WHEREAS, The 60th anniversary of the deactivation of the 112th Cavalry, Texas National Guard, on January 17, 2006, affords a fitting opportunity to recognize the important role of that regiment in our nation's history; and

WHEREAS, The 112th Cavalry served gallantly through 434 days of combat in the Southwest Pacific theater during World War II, an essential theater of U.S. operations throughout World War II; brought into federal service on November 18, 1940, the regiment helped secure the southern border of the United States as mounted cavalry, was sent to the South Pacific theater of operations and served as a mounted security force on the French possession of New Caledonia, seized Woodlark Island in the Southwest Pacific, assaulted the Cape Merkus Peninsula at Arawe, defended the Driniumor River in New Guinea, and participated in the campaigns at Leyte and Luzon, before entering Tokyo Bay on September 2, 1945, and becoming an occupying force in Japan at the end of World War II; and

WHEREAS, A regiment of many "firsts," the 112th Cavalry was the first unit in the Southwest Pacific to use bazookas and flamethrowers in the destruction of enemy defenses, the first to use rocket-carrying amphibious assault vehicles (DUKWS) in an amphibious attack, the first to use the Landing Ship Dock (LSD) in an attack (USS Carter Hall), and the first to use helicopters as a standard method for medical evacuation; furthermore, the regiment was nicknamed "The Little Giant of the Pacific" for its proven combat performance in relationship to its relative size; and

WHEREAS, On July 2, 1946, the 112th was reactivated as a unit in the Texas National Guard, it was reclassified as the 112th Armored Cavalry Regiment and later reclassified as separate battalions of the 112th Armor, Texas National Guard, and today combat elements in direct lineage from the 112th Cavalry proudly serve their nation in Iraq; and

WHEREAS, The Texas Military Forces Museum and the 112th Cavalry Veterans Association now serve to commemorate the 112th Cavalry as a symbol of our commitment to freedom and a source of great pride for all Texans; now, therefore, be it

RESOLVED, That the 79th Legislature of the State of Texas hereby designate January 17, 2006, as 112th Cavalry Day and extend to all those associated with the 112th Cavalry sincere thanks for a job well done; and, be it further

RESOLVED, That an official copy of this resolution be prepared for the 112th Cavalry Veterans Association, the active battalions of the 112th Armor, and the Texas Military Forces Museum as an expression of esteem by the Texas House of Representatives and Senate (112th Cavalry Day legislation, April 1, 2005).

Submitted on April 1, 2005 to our local representative, our draft legislation was transformed into law in less than 90 days. It progressed in the following fashion:

- Filed 04/11/2005
- Referred to Rules & Resolutions 05/02/2005
- Considered in Rules and Resolutions 05/11/2005
- Placed on Congratulatory & Memorial Resolutions Calendar 05/13/2005
- Laid before the House 05/13/2005

- Adopted 05/13/2005
- Senate Receives from the House 05/13/2005
- Senate Reads & adopts 05/23/2005
- Senate passage reported 05/23/2005
- Reported enrolled 05/25/2005
- Signed in the House 05/25/2005
- Signed in the Senate 05/25/2005
- Sent to the Governor 05/26/2005
- Signed by the Governor 06/18/2005

Possibly one of the most public outcomes of the HWB project had required but a few hours of work from the parties involved.

#### Team Meeting 9

The ninth meeting of the expedition took place on May 28, 2005, and it convened, as usual, in the expedition workroom at my house. Taking place on a Saturday, the meeting marked the first day of what would turn out to be a very busy weekend for the expedition's participants. On the day after the meeting, on Sunday, the expedition began a two day trip to Fredericksburg, Texas. There, expedition participants would attend, for a second time, the Island Assault demonstration, and the following day, Monday, participate in the Memorial Day ceremony at the Museum of the Pacific War. Saturday's expedition meeting marked the first time its participants had gotten together since the teenagers had begun work on their rough drafts. Consequently, the meeting focused on the writing process. Although the expedition schedule called for the submittal of first drafts by Memorial Day weekend, by the time of Saturday's meeting, only Juliet and Sierra had submitted anything resembling a draft. Knowing that we had

agreed the writing process should be complete by the third week of July, I knew it was time to focus the teenagers on their task.

I started the meeting by asking the participants how hard it had been to start writing. Delta seemed to voice the opinion of Charlee and Victor when she commented, "It is hard to get started, very, very hard." Both Delta and Charlee appeared overwhelmed by their writing task. Charlee was having difficulties going through the different folders of source information on the expedition CD I had created for each participant. In addition, once she had information, she experienced difficulties in presenting it in the form of an organized narrative. She commented:

I hate it because you can only get a little bit of information from one packet, so that you have to click on all these other different folders and stuff to make three paragraphs. It is hard for me to figure out which sections to put stuff in. Like I want to write one big thing about the Driniumor, but then I remember that I should put it into sections or categories (Team meeting, transcript excerpt, May 28, 2005).

While Charlee was the one who had voiced the comment, I knew my response had to address the other teenagers who were having a hard time getting started as well. I also knew, based on my experience in the classroom, that Charlee and Delta were near the breaking point. Whatever I said had to be supportive; it had to address their fears; and it had to be heard by all of the teenagers. I gave the following advice:

Just write it all down. I guess the way I would go about it would be to try and find a document, probably a secondary source, that gives you somewhat of an overview, or read somebody's description of it that gives you an overview. Just get that down on paper. Re-read it and say, 'Okay, what do I know requires some strengthening here? Where do I know I can put quotes in to make this stronger?' The last thing you should probably worry about is sections, or what section it goes into. 'Maybe this should go over there and maybe this should go here.' That's all stuff you can cut and paste very easily once you have got the words, but if you don't have the words, it is not going to work very well.

I think that rather than wrestling with how to start, because, literally, you have tried to start and you can't get going, then give me a phone call and we can talk

over the phone or you can come here. [If you come here] you can work with hardcopy documents as opposed to your computer. Do what it takes to start it. I know at the end of the school year it's tough, because you have other things competing against this. You have got all kinds of school stuff and extracurricular stuff, but now that school is out of the way, an hour or two has probably been freed up out of each day to take a whack at this (Team meeting, transcript excerpt, May 28, 2005).

Following those comments, a discussion ensued regarding how to expand a very short draft into a much larger document by using oral history excerpts as literary illustrations, providing insight into alternative interpretations of the phenomenon, identifying contradictions, and providing a reasoned argument in favor of a particular interpretation. I commented that their writing should in some ways reflect the process they as historians had applied to the subject. The discussion soon centered around the role of historians.

Charlee: To re-tell.

Delta: To learn from mistakes.

Mike: To inform about the past...So that it doesn't happen again.

Charlee: To remember people.

Liz: I guess the real reason is, I suppose--

Delta: To learn about the world--

Liz: Yeah, what has worked and what has not worked and why things are the way they are.

Delta: It gives you the background of where you live.

Glenn: So, it is an owner's manual for society. It is boring, it is candid, and it is kind of necessary, just like an owner's manual. History says to us, "Here is how you ended up the way you are and if you want to know why it is done this way, look inside." (Team meeting, transcript excerpt, May 28, 2005).

### A Second Living History Visit

By the end of April 2005, I realized that the expedition members might benefit from another trip to Fredericksburg. While our first trip had been highly motivating to the

teenagers, at that time they had no particular focus for their observations. Now, they were deeply engaged writing their chapters for our final narrative. All of them seemed to have questions that could be answered, at least in part, by another trip to the National Museum of the Pacific War and its Island Assault demonstration. My co-researchers agreed. Consequently, I contacted the museum and arranged for us to visit over Memorial Day Weekend 2005. In particular, I wanted Mike to get a chance to spend time with the reenactors, get close to the weapons, and gain a better understanding of the weapons that would be his subject matter for a chapter. Having asked the expedition members if one of them wanted to go with Mike and take notes as he talked to the reenactors, Juliet responded that she was interested in talking with the reenactors about weapons as well. The curator of the museum, who also ran the living history unit, gave his approval for both Mike and Juliet to enter the weapons and equipment building after the demonstration was over.

Our second trip to Fredericksburg, Texas, took place on Sunday, May 29, 2005. We arrived, ate lunch at a local restaurant, and toured the museum. Each of the participants set their own course within the museum, a course largely determined by his or her individual information needs. Then, we joined up at a prearranged time and rendezvous point and walked over to the demonstration area for the early afternoon performance. This time, there was a noticeable difference with regard to my co-researchers' interests. They took notes as the demonstration was going on, asked the reenactors questions at the end of the living history performance, and were more familiar with everything they saw. At the landing beach exhibit near the demonstration field, they recognized the amphibious vehicle as an Alligator (LVT) of the type the 112<sup>th</sup>



Cavalry used at Arawe. This time, they recognized that the 37-mm antitank gun used in the demonstration was the same kind used by the 112<sup>th</sup> Cavalry to act as an anti-submarine defense on their troopship going over to New Caledonia in 1942.

After the demonstration was over, I led Mike and Juliet over to the curator and we introduced ourselves. While the other expedition members went to get a snack and then returned to the museum to continue their research, the curator led Mike, Juliet, and me into a building at the rear of the audience bleachers. Here the re-enactors spent their time in-between performances, and it was here that Juliet and Mike would meet both the BAR operator and the Marine who carried the Thompson submachine gun during the demonstration. In real life, each was a social studies teacher. During the interview, however, they stayed in character.

As we entered the building, we were met by the overpowering smell of canvas, gun oil, and sweat. The building was filled with noise as reenactors gathered around wooden tables and began to field strip their weapons. Like soldiers all over the world, they yelled insults to each other, made jokes, distributed cleaning rags by tossing them through the air, and, in general, enjoyed their time to relax. Most had a cold soft drink of some kind and all were busy wiping gunpowder residue and sweat from their faces, necks, and hands. As soon as they could, they began cleaning their weapons.

The curator brought us to a table that was out of the flow of events and offered a chair to Mike and Juliet. He motioned for both the BAR operator and the Thompson submachine gun operator to come over to the table. "These teenagers are doing a project on the 112<sup>th</sup> Cavalry in World War II," he said to the two reenactors, "and they

have got some questions about what they saw today. I told them you could help them out.” With that, the curator turned and left.

The BAR operator approached the table. About six feet in height and weighing approximately 200 lbs, the burly BAR operator came over to the table. Noisily he dropped the BAR on the table and sat down. Throughout this process, he never looked at Juliet or Mike; instead, he looked at the table’s edge. Slowly, and with great deliberation, he removed a large cigar from his mouth, a cigar I realized he had been chewing on for at least an hour. He placed the thick cigar on the table’s edge and stared at it for a second or two. He then raised his head, leaned forward, and looked Mike square in the eye. Locked on to Mike’s eyes like a laser, he uttered only one word, a word with the inflection of a command: “Shoot.”

As I watched the beginning of the interview between Mike and the reenactor, I chuckled. I thought, “This BAR operator could intimidate a lot of very tough men; I can’t imagine how Mike feels right now. In fact, better him than me!” Prepared to jump into the conversation if needed, I held my breath and waited for Mike to respond. To my relief, Mike started in:

Mike: Well, I just have some questions about what are the pros and cons of the BAR?

BAR man: The pros and cons of the BAR. Okay. Let’s go with the cons first. It is magazine fed. You have got to switch magazines every 20 rounds, and you saw how fast the rounds go through it. The guy is carrying ammunition and his assistant gunner is carrying ammunition, so the problem is that you have got to carry so much ammunition on your body. I’m carrying 17 more pounds than the guy next to me, and that is all ammunition. That is because I’m carrying the BAR. So, that’s a bad thing. If you had a belt [of ammunition] it would be faster and you can carry the belts of ammunition in cans and things like that. But that is one of the drawbacks. The other thing is that the BAR is

a heavy weapon. It weighs 20 pounds and it is hard to fire offhand...

Mike: ...How difficult is it to field strip one of these?

BAR man: It's not that complex. It comes apart pretty easy. Another con would be that you have to spend a lot of time cleaning it because it does gum up. You have to understand that when you put real rounds in there it purrs like a little kitty cat. But, I'm firing blanks and it will get gummed up. You do have to keep it pretty clean.

Mike: How often do you clean it?

BAR man: If I was in combat, any time I took a break or they gave us a break, I would be cleaning it. Okay? I would be making sure that no sand or dirt was in it. And after I fired it, every time I got a break, I would be wiping it down. Once again, that was a con.

What's the good part about a BAR? It was the first truly portable automatic weapon in a squad. It is an automatic weapon that one guy can carry; it is not crew served. So when you give an automatic weapon to a fire team, that means that you have three other guys with you carrying weapons. This is a psychological put down for the enemy. When they hear that BAR on automatic, they are just freaking out. If they just hear the "pop," "pop," "pop," of a rifle, they are okay. When you put this BAR with a group of four guys, the bad guys go nuts. It's like a lawn mower. It cuts the grass down. It cuts everything down. So, the good thing was that you had a mobile machine gun with every four guys. So, the Marines felt confident they could do things. They had a good base of fire.

Juliet: Can I ask about the pros and cons of the Thompson?

Thompson man: The Thompson is relatively compact, so it is easy to get around. Especially being cavalry, they would have been in vehicles or on horseback. It is a smaller weapon, and it is easier to move around. Even though it weighs 9 pounds, it is shorter and more compact. One of the big pros is that it is full automatic. So it will put out as many rounds as there are in the magazine that you put in it. The cons are that it is short range. It is only good for about 50 yards. If you are in close range, like in the jungles, then it is probably good. But if you see a guy running across a field, you are probably just going to waste ammunition shooting at him...

Juliet: ...I have a question. You have a strap on your Thompson. Did all of them have straps? It seems to be kind of strange because they would be getting in the way.

Thompson man: You're right. The slings would get hung up on things. Lots of times if you're in a vehicle you might get clotheslined as you were trying to get out. But they came with them, so we carried them. On the march, you're going to want one with a sling so that you can put it over your shoulder and not have to carry it with both hands. The Thompson had this particular sling that was really developed for another weapon in World War I. They had a lot of them, so they just buckled it on there. You will see this sling on some other weapons too, but most of the time you will see it on a Thompson (Excerpt from transcript, Sunday, May 29, 2005).

The interview had turned into a conversation. For the next 20 minutes, the Thompson submachine gun operator spoke with Mike and Juliet. He took them into the area where the Japanese weapons were kept and showed them the Japanese Arisaka rifle and Nambu machine gun. Time quickly went by, and it was soon time for the two reenactors to prepare for their next performance. Mike and Juliet thanked the two living historians, as did I, and we left to return to the museum.

### The Memorial Day Ceremony

A few weeks prior to Memorial Day weekend 2005, I was contacted by a member of the 112<sup>th</sup> Cavalry Association. He lived in the area near the Museum of the Pacific War, Fredericksburg, Texas, and had attended several of the Memorial Day ceremonies at the museum. His concern was that he was no longer able to get out of his home and that he would be unable to attend the museum's Memorial Day ceremony. Consequently, he would be unable to fulfill the unofficial annual duties he performed at that ceremony. As he explained, the 112<sup>th</sup> Cavalry Association had dedicated a plaque in honor of the regiment as part of the museum's memorial wall in 1992. For 14 years, he had quietly attended the museum's Memorial Day ceremony and placed a bouquet of flowers at the plaque. As the years went on, he saw fewer faces from the 112<sup>th</sup> at the ceremony. For the last several years, as far as he knew, he had been the only 112<sup>th</sup>

veteran or family member attending. Knowing that he was unable to attend any more of the events and concerned that he was close to “meeting my maker,” he had been looking for a way to continue his tradition. He had heard of our efforts through the 112<sup>th</sup> Cavalry Association newsletter and was wondering if we could arrange to continue his tradition that year. I thanked him for his phone call, told him we were already planning to be in Fredericksburg to attend the Island Assault demonstration that weekend, and said we would be honored to carry on his tradition in 2005.

I contacted my co-researchers by telephone and asked if any were interested in attending the ceremony, how official they thought we should make our participation in the ceremony, and what we should do regarding flowers. Although all of the teenagers wanted to participate, only five of the six could attend. Victor had started a new job and was undergoing training that weekend. All of the participants suggested we make our presence known and that we contact the museum in order to become part of the official ceremony. Finally, we agreed that we would lay a wreath in memory of those who had died who had been part of the 112<sup>th</sup> Cavalry. Given that guidance, I contacted the museum.

The museum staff were more than happy to include us in their ceremony and apologized for the fact that it was too late to add our names to the official program. However, they assured us we would be included verbally in the ceremony. I provided the museum spokesperson the names of each of the expedition attendees, where we would be lodging the night prior, two contact phone numbers, and the fact that we would be placing a scarlet and white silk wreath at the 112<sup>th</sup> memorial plaque. I explained that scarlet and white are the cavalry colors. Finally, I advised the spokesperson that the

wreath would be delivered to the museum's main office the afternoon prior to the event. With that coordination, the expedition became part of the ceremony.

Memorial Day 2005 arrived, a bright, sunny day in the Texas hill country. We got up early at the hotel and rendezvoused as a group at the hotel's dining room. There, we planned on eating our complimentary breakfast and discussing the events of the day. I was interested in seeing how the other expedition members were going to dress for the Memorial Day ceremony.

As the leader of a group of teenagers acting on behalf of the 112<sup>th</sup> Cavalry, I felt a sense of responsibility and formality and wished to portray an air of respect at the proceedings. The day before, at the reenactment, the teenagers had dressed appropriately for the weather and that particular event. In general, they had worn baggy shorts, tee shirts, and sandals to the reenactment. I was interested in seeing what they would wear today. One by one, the teenagers began to arrive in the dining room. Charlee was dressed in a conservative skirt and blouse, Delta wore a dress, both Sierra and Juliet wore fashionable pants and blouses, and Mike wore a dress shirt, khaki pants, and dress shoes. They were dressed as nicely and appropriately as they could be for the event. In addition, unbeknownst to me, each had brought their white baseball cap emblazoned with the 112<sup>th</sup> Cavalry insignia. They had received the caps at the 112<sup>th</sup> reunion seven months previously in October 2004. I was both impressed with their individual decisions regarding dress and proud of how they looked.

As we sat at several small, co-located tables, the teenagers began to ask questions of me regarding the day's activities. I knew I had few answers, but I needed to

reassure my co-researchers that everything was going to go fine. My notes reflect the following conversation:

- Mike: Dad, a couple of us were talking together earlier this morning. A couple of questions have popped up about today. Is this a good time to talk about them?
- Glenn: Well, if I've got answers, I'll let you know what they are. First, what are the questions?
- Delta: Are we going to have to give any speeches today? If we are going to speak, I've got to think about what I'm going to say.
- Glenn: The spokesperson from the museum didn't say anything about remarks. We are simply to wait until we hear the 112<sup>th</sup>'s name announced and then grab our wreath and place it next to the wall where the plaque is. However, I wouldn't be surprised if a news reporter asks how you teenagers got involved in something like this. If I were you, I'd be ready to tell anyone who asks, who we are, why we are here, and who the 112<sup>th</sup> Cavalry was. If it gets more complicated than that, just send them to me.
- Sierra: How are we going to lay the wreath? Are all of us going to do it or will you do it for us?
- Glenn: Why do you ask?
- Sierra: I just want to know if I'm going to have to get up in front of everybody. If I have to, I'll do it. Otherwise, I'll be happy just to be at the ceremony.
- Glenn: I'm not exactly sure how this is going to work. I think we can't go wrong if we figure out how we think we want to do this. Let's put it this way, you get nothing out of this if I'm the one doing it. Why don't you guys elect two of you to do the presentation of the wreath at the memorial wall. Your job will be to go forward from your seats, grab the wreath, and then walk over to the part of the garden area that has the 112<sup>th</sup> plaque. Once you are at the plaque, set it down, bow your head for about 10 seconds, and then come back to your seats. Does that work?
- Sierra: That works! I nominate Mike.
- Delta: I nominate Juliet.
- Charlee: I agree!
- Glenn: Juliet and Mike, are you willing to do that?
- Juliet: No problem.
- Mike: [In jest] Well, if I have to...

Glenn: Good! We are set (Investigator's journal, May 30, 2005).

The conversation continued in the same vein throughout breakfast. After breakfast, we drove to the Museum of the Pacific War for the Memorial Day ceremony.

We arrived in Fredericksburg, Texas, at 9:00 a.m. on Memorial Day. The main street of the town was bustling as veterans, family members, band members, a color guard, and tourists thronged to the museum. There was a big white awning set up to the left of the museum in the memorial park. Under the awning were chairs for the participants. At the far end of the awning were a podium and an area with over 30 wreaths in it. We checked in with museum personnel, picked up our wreath, delivered it to the podium area, and went over to take our seats.

The courtyard in which the ceremony was taking place was surrounded by old stone walls built out of cut limestone. The museum believes the walls are from the 1800s and are representative of construction techniques from that era. The stone walls became the museum's Memorial Wall, when plaques honoring the contributions of U.S. forces during the war in the Pacific were added. Plaques could be donated on behalf of ships, units, or individuals. In our case, the plaque honoring the 112<sup>th</sup> Cavalry Regimental Combat Team (RCT) was donated by veterans of the regiment.

Although it was still early in the day, it was already hot under the awning. World War II veterans began to gather in the canopied area in uniforms representing a variety of organizations: Veterans of Foreign Wars, American Legionnaires, Disabled American Veterans, the Marine Corps League, Navy League, and a number of organizations representing particular units from the Pacific war. Most of the World War II veterans were over 80 years of age and as a group were beset by any number of physical infirmities. Dressed in their uniforms, many approached the shaded area and gave their



walkers and canes to family members who remained outside the tent during the ceremony. Pride of being in uniform, pride in the camaraderie shared between themselves, and pride in what their outfit had accomplished was evident in the way they carried themselves. Mike leaned over and said, "Dad! Those guys over there [pointing] are from the 158<sup>th</sup> Regimental Combat Team (RCT). Is that the same 158<sup>th</sup> RCT that was with the 112<sup>th</sup> at Arawe [New Britain]?" "There was only one 158<sup>th</sup> RCT," I said. "The 158<sup>th</sup> RCT was certainly with the 112<sup>th</sup> at Arawe, but I don't know if those particular veterans were there in 1943." I went over to the 158<sup>th</sup> RCT veterans and introduced Mike and myself. We exchanged hellos, shook hands, and I asked if any of them had been to Arawe. They had not. All of them had been assigned to the 158<sup>th</sup> RCT later in the war. As we were talking, an individual went to the podium and began to attract everyone's attention. The ceremony was about to begin. Mike and I said goodbye to the veterans of the 158<sup>th</sup> RCT, the unit which shared the 112<sup>th</sup>'s burden of fighting at Arawe, New Britain, in late 1943 and early 1944. Promptly at 10:00 a.m., the program began.

The ceremony was initiated with the master of ceremonies welcoming everyone to the event. A color guard consisting of representatives from the armed forces posted the colors, and a local singer lead the attendees in the singing of the national anthem. While everyone was still standing, a Junior Reserve Officer Training Corps (JROTC) cadet from the local high school led the audience in reciting the Pledge of Allegiance. He was followed by a minister who delivered the invocation. Once the prayer was concluded, everyone took his or her seats.

Although most participants attended in order to place their wreath, there was an entire program of remarks, musical selections, and a guest speaker, which had to take

place before the wreath ceremony. The marching band from the local high school performed "America the Beautiful," "God Bless America, " and "Anchors Aweigh." Then, in honor of the attending veterans, the band played the "Salute to America's Finest." A medley of each of the service songs, veterans of a particular armed service would stand as their service song was played. Veterans of the Army stood as the band launched into "The Caissons Go Rolling Along." As I looked around, only the members of the 158<sup>th</sup> RCT delegation, a few active duty soldiers, and I, were standing. Normally, the Army has the largest number of veterans at most public ceremonies. Here, at the National Museum of the Pacific War, there were so few of us! Then, the band segued into the broad melody of "Anchors Aweigh." Navy veterans, almost two-thirds of the audience, stood in honor of their service song. On the heels of the Navy's service song, the band launched into a spirited rendition of Semper Paratus. A single veteran of the U.S. Coast Guard took to his feet and everyone smiled and applauded. Then, with a very determined and martial air, the band rendered honors to the Marine Corps as it began to play the "Marine Hymn. " I had been waiting for this song since I had seen a number of Marine veterans from World War II helped to their seats. Stopped with age, apparently feeble, and requiring help to walk, these aged Marines had come in under the awning to sit. I awaited their response to the "Marine Hymn." As had been my experience in the past, upon hearing their beloved service song, all of the Marines in the audience stood up and came to attention. Some Marines helped others stand, but every Marine was on his or her feet. They stood at attention; ramrod straight, some with tear-streaked faces. In front of our eyes, we saw these senior citizens transition, if only for a few seconds, into the young Marines they once had been. As the Marine Hymn ended,

a number of younger Marines recently returned from Iraq joined in a chorus of guttural “Ooh-rahs” as they took their seats. The band finished the salute by playing the “U.S. Air Force.” Many attendees who were veterans of the U.S. Army Air Force (USAAF) during World War II declared their service allegiance and affiliation by standing for that branch’s service song. With the song ended, the ceremony continued with the keynote speaker. Author of a book about the Marines in their fight on Peleliu during World War II, he captivated his audience with highlights from their story. Finally, the time had arrived to begin the wreath ceremony.

Attendees listened as the announcer read the designations of the units receiving wreaths were over the public address system. To my ear, it was like a history of the war itself. The USS Missouri that fought at Iwo Jima, Okinawa, accepted Japan’s surrender in Tokyo Bay on 2 September 1945, and then went on to fight in the Korean War and Operation DESERT STORM. The USS Indianapolis that delivered the atomic bomb to the B-29s that would drop it and was then lost on its return with almost all of its crew. The USS Iowa that fought in so many famous battles in the Pacific, then fought in Korea, and ended her combat career during Operation DESERT STORM in the 1980s. The 1<sup>st</sup> Marine Division, veterans of Guadalcanal and the unit which loaned its tanks to the 112<sup>th</sup> Cavalry for use at Arawe. The 2<sup>nd</sup> Marine Division, veterans of Guadalcanal, Saipan, and Okinawa. The 3<sup>rd</sup> Marine Division, veterans of Guam and Iwo Jima. The list seemed to go on forever and the names evoked memories of the struggle in that Pacific war during World War II. We watched as representatives from each unit recovered their wreath from the front of the tent and placed it near the plaque honoring their unit. Ship after ship was named and former crewmembers gathered their wreaths and lay them at

their memorial plaques. The 158<sup>th</sup> RCT was called. The Marines and Army Air Force units were called. Finally, they reached the end of the list. We had not been called. There were still a few wreaths in the front of the tent belonging to units, like ours, that had somehow been left off the list. The master of ceremonies invited representatives who had not yet retrieved their wreaths to do so. We retrieved our wreath and carried it over to the plaque for the 112<sup>th</sup> Cavalry. We placed the wreath at the base of the plaque and silently read its inscription:

In memory of the Troopers of the 112<sup>th</sup> Cavalry Regimental Combat Team  
who gave their lives in the cause of peace.

Pacific Theater World War II 1942-1945

Woodlark Island

Arawe, New Britain

Aitape, New Guinea

Leyte, Philippines

Luzon, Philippines

Honshu, Japan Occupation

Presented in grateful appreciation by their fellow Troopers--1992

After all the wreaths had been placed, everyone returned to the area near the awning. On command, the color guard dipped its colors in salute to the fallen of all services. The firing party fired their three-volleys for a 21-gun salute. Then echo "Taps" was played. A benediction was offered and people bowed their heads in prayer. After the benediction, the master of ceremonies thanked all for attending, welcomed them to attend the ceremony the following year, and wished everyone a safe drive home. The ceremony had ended.

We took some pictures of the wreath we had placed near the memorial wall and the plaque honoring the 112<sup>th</sup> Cavalry. Then, as is always the case with memorial

services, continued our lives. The teenagers changed into traveling clothes, and we began our long drive home through countryside resplendent with wildflowers. After a few hours, we stopped to have some dinner. During that meal, we reflected on our experience.

- Glenn: What, if anything, did you learn by going on this particular trip to participate in the Memorial Day ceremony?
- Delta: How the cavalry is pretty much...overlooked by the rest of the veterans.
- Glenn: Why do you say that?
- Delta: Well, because nobody was aware of the 112<sup>th</sup> where we were. They kind of forgot about our wreath thing which, understandably, was not in the program. Plus, there were a lot of Navy guys all around.
- Glenn: Was there any part of the memorial service itself that clicked with you? Or, did our circumstances of standing off to the side and not being named cause you not to connect with it very much?
- Charlee: I connected with the songs and remembering everyone who has died and how everyone who was part of it. The 21 gun salute.
- Delta: Yeah! That was cool. And it was loud!
- Glenn: I guess one of the things that surprised me was that when you were listening to the band play all of the service songs--did you recognize that they were the service songs and that each of the military services have a song?
- Charlee: Um-humh. We have had to play it plenty of times before for Veterans' Day [in the school band]. And I noticed that people were clapping during the songs and that some clapped for the Army's song and that nobody clapped for the Coast Guard song.
- Delta: Nobody was there representing the Coast Guard.
- Glenn: Well, one guy did stand up for "Semper Paratus" [the Coast Guard song].
- Charlee: Well, the clapping was kind of funny.
- Mike: I don't like it when people clap during those songs.
- Glenn: Why is that, Mike?
- Mike: For two reasons. First, it detracts from the song coming after it. People are still making noise about the last song when a song that is important to someone is just beginning. That brings me to the second reason. I don't think service songs should be viewed as

entertainment. They should, like the national anthem, be treated with some level of respect. No matter what others think, I believe the songs stand for soldiers, sailors, and airmen who died or were wounded, or went insane, as a result of their service to us. To clap during a song that is like that is like talking during the national anthem.

Glenn: Well said (Investigator's journal, May 30, 2005).

After we returned from our Memorial Day Weekend trip, we sent out a message to the 112<sup>th</sup> veterans through three methods of communication. First, we left the message on the 112<sup>th</sup> Cavalry online bulletin board at the Texas Military Forces Museum. Second, we posted the message with the 112<sup>th</sup> Cavalry page at Yahoo Groups, then, we e-mailed it to the editor of the 112<sup>th</sup> Cavalry Association newsletter. Inclusion in the newsletter would ensure that those veterans not connected to the Web could read about our experience on their behalf. The message was drafted by Juliet, Mike, Sierra, and Charlee; it read:

We wanted to give you an update on our Memorial Day activities on behalf of the 112<sup>th</sup> Cavalry. We traveled to the National Museum of the Pacific War in Fredericksburg, TX over Memorial Day weekend in order to participate in the memorial service on Monday, 30 May 2005. As part of the ceremony, we laid a wreath at the memorial plaque honoring the 112<sup>th</sup> Cavalry RCT in the Memorial Courtyard of the museum. If you'll remember, that museum used to be the Nimitz Museum. In light of that, most of the wreaths were associated with US Navy ships. Surrounded by sailors, Marines, and airmen, we tried to represent not only the 112<sup>th</sup>, but the Army as well. We think you would have been proud. The only other Army ground unit represented was the 158th RCT. It was their 2nd Battalion that came into Arawe in mid-January, along with B Company, 1st Armor Battalion, 1st Marine Division, to help the 112th attack that Japanese defense line. Three of their veterans were there and were happy to see our hats with the 112th logo and our wreath.

Please see the attached photos of the wreath at the memorial wall. We want you to know that your fellow Troopers who are no longer with us were remembered, and that your suffering during the war on behalf of freedom is still appreciated. If you look to the upper right of the wreath, you will see the 112th plaque from the memorial wall of the museum courtyard (HWB project members, posting on message board to 112thTrooper@yahoogroups.com, June 2, 2005).

In response to the posting, the following messages were received. From the daughter of a former 112<sup>th</sup> Cavalry commander, herself a retired colonel in the Army:

Thank you very, very, much for emailing the photos from the Fredericksburg ceremony! How nice to make that connection for all of us who could not attend. The 112th did so very much. It is nice when next generations can help to keep that recognition alive. It was certainly a very "alive" unit!! (Daughter of 112th veteran, personal communication, June 2, 2005).

From a former member of the 112<sup>th</sup> Cavalry who was on the board of the 112<sup>th</sup> Cavalry Association:

I'm very impressed with your student group of 112th Cavalry supporters. The wreaths were beautiful and I'm sure every surviving World War Two trooper of the 112th appreciates the thought and effort that went into their selection as well as the Memorial Day tribute to Cavalry veterans. A 21-gun salute to these youngsters! (112th Cavalry veteran, personal communication, June 2, 2005).

This, from a man who is the son of a 112<sup>th</sup> Cavalry veteran:

Thanks for representing my heroes at Fredericksburg! My father was a BAR man with F troop and saw action on New Guinea, Leyte & Luzon...Dad never liked to talk about it, but was right proud to be a trooper with the 112th....! I really look forward to your history and thank you and your teenage volunteers for your hard work telling the story. With kids like yours, my children's children will know what brave Americans did for our country! (Son of 112th Cavalry veteran, personal communication, June 2, 2005).

#### Team Meeting 10

On June 12, 2005, the expedition met for a team meeting at my house. The focus of the meeting was the continuing process of writing the final report. I provided the students examples of how they could take otherwise uninteresting information and present it in more interesting ways. Initially, I provided examples of how an author can make even a boring list of equipment more interesting, and, in the case of the 112th Cavalry, even exotic. The example I worked with was an equipment list I was providing to Juliet for her draft chapter on equipment. It was the list of items to be carried on the person of each trooper in the assault wave at Arawe.

I asked all of the participants to listen, then I said to Juliet, “You are going to get this list, and I want you, somehow, to make sense out of it. It is the list of stuff that was supposed to be carried on them [the soldiers] during the assault.” The list consisted of 17 items which included: two piece herringbone twill uniform; weapons, gas mask, sidearm, steel helmet, machete with sheath, entrenching tool and cover, individual issue of toilet paper, and identification tags. I explained to Juliet that each of the items on the list had some importance to the soldier and that there were stories associated with each of them. The stories could be found in the oral histories of the 112th veterans. Consequently, a simple list of otherwise innocuous items could become a gateway for telling stories, stories which helped explain the very personal world of soldier’s in combat. That world would be explained by the soldiers themselves through quotes from their oral histories.

In one of those unplanned moments teachers love, one of the teenagers immediately provided an example. Mike pulled out his two identification tags which had been made for him years earlier in a military surplus store. He showed the other teenagers that both were imprinted metal tags with name, service number, religious preference, and blood type on them. One of the oval tags had a v-shaped notch cut out of it. Mike explained that all soldiers had two of these “dog tags” and that when deployed to a combat zone, “This one with the notch, is supposed to be tied to your boot. The other one remains around your neck. If you are killed, the one around your neck is taken by someone else in your squad as a record that you are dead. The other is left with your body for identification reasons. If you are buried away from the U.S., they place the v-notched ‘dog tag’ in your mouth. That way, there is a standard place all



grave registration teams know to look for your identification when you are dug up.” Even I, his father, was unsure where Mike had come across that information, but he was correct. I picked up the conversation and explained that all of the items had such stories associated with them and that stories of helmets, machetes, uniforms, gas masks, and many other items were in the oral histories. I concluded by reminding my co-researchers that the human interest story was a powerful tool and that the same way they were captivated by the oral histories, they now had the opportunity to transplant those stories into their chapters. By doing that, they could increase the length of otherwise skimpy draft chapters and improve on how interesting those chapters were to readers.

I asked the participants what issues they might be having with their research or writing. Mike explained that he had set aside one hour per day to write and that no matter what, he spent that hour trying to write, even if nothing flowed. He added that the hour was spent in a quiet room at a nearby university library, so there were no distractions from his task. Delta said, “I have almost one page done on the Driniumor River. I’m getting there, slowly but surely. Right now, I just got finished describing Aitape. Describing the location and the atmosphere.” I asked her what I could do to help. Her response of “who knows” spoke to her frustration. Mike quipped, “There’s one more room at the university!” Everyone in the room laughed, and Delta responded,

Take me there then. Sure. Let’s go to the university. The problem is that I’m working. Next week, I work whole week until 4 p.m. So, I’m usually dead by the end of the day, and I don’t feel like doing much. So, I only have the weekends, basically...This week, I’m working at a camp and then next week I don’t know. I only have two weeks scheduled at a time (Team meeting, transcript excerpt, June 12, 2005).

I suggested that Delta might aim for getting only one page done per day. She replied, “I buy that. But I say, ‘Delta, do one page per day.’ But, that has not worked out yet. I keep telling me myself that, but my hands do not do it.” My response was the old Chinese proverb that “a journey of one thousand miles begins with the first step.” Then, I tried to provide some form of guidance that would allow Delta the opportunity to accomplish her goal without feeling too much stress. In spite of the stress I was feeling, I said:

...What you want to do is sit down and develop an outline of what you know you want to cover. Then, without looking at any notes, break that outline down into as fine detail as you can. Then, just say, “Okay, today I’m going to handle this one detail. Tomorrow I’m going to handle this other one. The day after that, I am working, so, either today or tomorrow I need to handle two details. But I need to keep on getting these details done, because if it sits there longer than a day, the inertia of daily life becomes big (Team meeting, transcript excerpt, June, 12, 2005).

Delta responded by saying that one of her biggest problems was understanding the subject matter. Unlike Charlee who wanted to go into the military, or Juliet and Sierra who had family members in the military, or Mike, who by virtue of being my son was virtually in the Army, Delta knew little about it. In her own words, Delta admitted that outside of the project she “could not care” about the military.

I realized that as expedition leader, I had a problem. I also had to assume that if Delta was providing this feedback, others in the expedition might feel the same. Consequently, I had to begin to formulate a solution that could help Delta, but could also serve as a model for others. During the meeting, Delta admitted that she only had one page done regarding the largest battle the regiment was in; she perceived that she did not have the time to put in more effort and that she was clueless with regard to the subject matter. Somehow, I had to create the potential for Delta to uphold her part of the

commitment we had all made to the expedition. I had already suggested she only focus on writing one page per day. In addition, I had already offered the services of our expedition room at my house or a quiet room at the university library for her research and writing use. I had only one other tool to offer, so I said,

Would it be helpful if we assigned Mike as your study buddy? You can call him up or instant message him by computer. What I'm getting at is that Mike, by virtue of his personal interest, understands weapons pretty well. By virtue of his just growing up with me, he knows a lot of what patrolling is about. He might be able to help you work your way through some of the stuff, because...the acronyms and the language are going to be difficult. So, you are clearly going to need someone to help you....You can do the study buddy thing with Mike, or you can just e-mail me with questions and I'll be more than happy to help you with answers. Either way, we can make this work. Would be helpful to you to just take Driniumor off the table? It was a really complex battle and it has already been written about by other people. You can just focus on patrolling. Which would be more difficult for you? (Team meeting, transcript excerpt, June 26, 2005).

Delta responded by saying "I kind of set my mind on doing Driniumor, completing it, and getting it out of the way. So, I would like to do that." I had gone as far as I was willing to go to provide aid to an expedition member. Unless Delta proactively asked for help, I was not prone to offer more than I just had, or change her commitment. It would be unfair to others, and I had other expedition members to think of.

Next, I spoke with Victor concerning obstacles he might have been facing. He responded by saying:

I found that my notes were my most useful thing I had...The notes I took from our day in Austin [at the museum]. They were easy to use because I had copied them down and then I just had to organize them into vital areas. I found... everything else was pretty hard to use because I was writing on, let's say, the horses and I'd have this 20-page document on how they were resupplied. It was hard to choose what I wanted....With 20 pages of information on how they were resupplied, I didn't know what to use. And then, I don't know, I think it's just how I write, but it came up pretty short. When I was writing it, I just wanted to put down just the facts, 'This what happened, as it happened.' Then, that made it sort of short compared to what I wanted (Team meeting, transcript excerpt, June 26, 2005).

I took the opportunity to provide the attendees with yet another approach to extending a short passage, especially with material foreign to the experience of the reader. As always, although my response was made to Victor it was intended for all of the attendees. I said:

Don't look at this as writing a paper, or a chapter, or a section of a book. Instead, just go over in your mind, "What do I want to say?" Then, write it out. It is very simple; it is very straightforward, and as you are finding out, it tends to be short. Short and sweet....Then, read what you wrote as if you were a reader with absolutely no knowledge of the 112<sup>th</sup> Cavalry, cavalry in general, World War II, or the Southwest Pacific. Just read what you wrote and ask yourself questions like that ignorant reader would ask. Insert those questions inside parentheses within what you just wrote. Then, go ahead and answer those questions in the paper. In other words, have a conversation with yourself on paper. Go back and forth in terms of, "Here is what I wrote. What would someone reading this who knows nothing about this ask? What are the answers to what they are going to ask? It begins to add volume to what you are writing. It is like a sponge expanding. At some point, you realize, "Oh, there is enough there for a whole new paragraph." And then you start doing paragraphing and things like that (Team meeting, transcript excerpt, June 26, 2005).

### The Writing Process

That part of the writing process I could observe was made evident in team meetings and the draft documents submitted, or not submitted, by expedition participants. With regard to my advice on writing and examples of writing methodology, much of that is covered in the team meeting sections of this chapter. How participants viewed the writing process from their own perspective is illustrated in the sections of this chapter dealing with group meetings and individual interviews. With regard to the evolution of the participants' writing, however, that is best explained by looking at their work at different stages of the writing process. This section of the chapter will provide such a snapshot.

#### *Evolution of Juliet's Writing*

During the course of the expedition, Juliet provided four documents which trace

the development of the topical sections of the final report for which she was responsible. Those topics were: (a) wounds and diseases, (b) equipment, and (c) the 112th's experience in the Philippines. The four documents Juliet submitted were: her research notes pertaining to the three topics that were her responsibility, and a first, second, and final draft of the sections dealing with those topics. The first document she submitted, 2,304 words in length, consisted of notes regarding her three topics drawn from her research. The notes were in a bullet format, made use of few sentences, and were arranged topically.

The second document Juliet submitted elaborated on her notes by using full sentences and paragraphs, citing sources, and adding a few quotes from the regiment's records. In effect, it was the first draft of each of her sections. In going from notes to text, the document shrank from the 2,304 words to 1,397 words. The primary cause that the text document was shorter than the notes was that Juliet's notes contained a number of overlapping and redundant entries.

Juliet's third document was 3,228 words in length. This second draft improved over the prior document by adding more quotes from other oral histories. In this second draft, Juliet used the quotes as a way to illustrate her expository writing and add a sense of authenticity to her text. This version of her sections presented Juliet as the subject matter expert and positioned those whose quotes were used as corroborative commentators on her narrative. This was history from the researcher's, or etic, perspective.

The fourth, and final, document Juliet submitted was 16,397 words in length. It used extended quotes from a variety of primary sources. No longer were Juliet's words

illustrated by the quotes, instead, Juliet's words provided narration for the words of the veterans. While still presenting information to the reader regarding wounds and diseases, equipment, and the 112th's experience in the Philippines, she no longer positioned herself as the authority. Instead, she allowed the voices of the soldiers to interpret and illustrate the topics of her sections. The basic thrust of Juliet's sections had changed from commentary by an outsider, or etic perspective, to the testimony of an insider, or emic perspective.

Juliet's revisions often reflected the advice and mechanisms offered by members of the team during conversations at team meetings. The only written feedback I provided Juliet was on her second document, or first draft. Based on passages I read in her first draft, as described in the following examples, I inserted observations in her document and then e-mailed it back to her. Having located a list of equipment that could easily be carried on a packboard, Juliet inserted the list in her text as an example of what soldiers carried in battle. The list was from a World War II-era military magazine. My sense was the reader would be better served by knowing what 112th troopers carried as opposed to what was listed in a magazine. I wrote, "List all of the equipment soldiers were carrying during the landing at Arawe. I'll give you that list today. Then we need to discuss key elements of that list." In another instance, Juliet was discussing the weather in the Southwest Pacific. I thought it better if she provided comparison data from someplace the reader knew. I commented, "Give us some comparison examples: Texas is...while the SWPA was..." My third comment involved her use of a description of unit requirements for mosquito repellent and netting. Although the description was correct and was appropriately positioned and cited, I sensed the reader would be better

served by providing concrete examples of the threat. Consequently, I suggested, “Name a few of the diseases the troops could catch from mosquitoes.” A fourth comment was elicited by her passage on different ration types issued in the Pacific. I observed, “I’ve never heard of J rations--I’ve heard of A, B, C, and K, but what are J Rations?” Concern for reader understanding led to my fifth comment; a comment associated with her analysis of supply requests from the frontlines during the Battle of the Driniumor River. In the text, Juliet provided a list of equipment that was in short supply during that battle. My advice was that the section might gain more immediacy if she provided an explanation of how the shortages would affect the 112th in battle. My comment to Juliet was, “Think about these supplies. If you were in charge of the 112<sup>th</sup> and you were in a battle at the Driniumor River, how would each of these missing items potentially affect your ability to shoot, move, and communicate?” Finally, in her text, Juliet described a terribly wounded trooper of the 112th. Familiar with the official report, I realized there was far more to the story; it was a human interest story that would provide the reader much cause for reflection. My comment on Juliet’s paper was, “Describe how they treated him from a triage perspective and how they didn’t expect him to live. Then tell how he was up the next morning drinking tea.” Those six comments were the only written feedback I provided Juliet during the writing process.

Juliet was the most structured writer of the six teenage participants in the expedition. While Juliet supplied four documents, three of which were drafts, Sierra provided three drafts of her work, Victor and Mike each submitted two drafts, and Delta and Charlee submitted their first draft as their final document. While Sierra, Victor, and to a lesser extent, Mike, exhibit growth and maturation similar to Juliet in their writing,

Charlee and Delta showed little progress. The growth in content knowledge exhibited by Charlee and Delta from that exhibited in team meetings and individual interviews in March and April 2005 to their final document submittal in July and August 2005 was minimal.

*Observations Regarding All of the Participants' Writing*

The final drafts my co-researchers submitted, when compiled and placed in a standard format, equaled 131 pages. Of the six teenage participants, two participants used footnotes to provide citations (Juliet, Sierra), two used in-text citations (Delta, Victor). Mike provided in-text citations for his section on Arawe, but not for his section on weapons. Charlee provided no citations in her work. Three made use of quotations from recent oral histories and older interviews with 112th troopers from World War II (Juliet, Sierra, and Victor). With regard to the content of their writing in their final products, I've included the following observations.

*Juliet's final product.* In her writing, Juliet exhibited a mastery of knowledge regarding the various maladies that affected soldiers in the Southwest Pacific. Similarly, her presentation of the influence of equipment on the operations of the 112th and the individual troopers is excellent. However, Juliet's inability to address the operations of the 112th in the Philippines is telegraphed by her too extensive use of quotations from oral histories. Although the quotations were interesting, Juliet was unable to tie them together as a unified commentary as she had with her other two sections. In terms of style and the mechanics of writing, Juliet displayed a mastery beyond that of her peers. Overall, Juliet exhibited a strong performance in knowledge acquisition and presentation



in her input to the expedition's final product. Juliet's final contribution to the expedition final product was 71 pages of text.

*Sierra's final product.* Sierra provided textual inputs regarding the topics of New Caledonia, Woodlark Island, and training. Her writing skills were strong, and her text flowed easily for the reader. While she exhibited knowledge of what 112th troopers had said about their experiences with regard to her topics, she paraphrased their words or only used snippets of their interviews as in-sentence quotes. Sierra mastered the specialty vocabulary associated with her topics and used that vocabulary to lend an insider's feel to her writing. The only drawbacks to her inputs were that she failed to provide the reader the mission the regiment had on New Caledonia and her description of a trooper's daily life on that island lacks rich description. Sierra's input to the expedition's final product was 10 pages of text.

*Victor's final product.* Victor did an admirable job writing his sections. Much of his writing was based on primary sources other than the oral histories, but he was adept at using quotes to illustrate what he wrote. In addition, he was able to paraphrase sources in a way that allowed his text to flow in a natural fashion without break. Unfortunately, Victor did not cite many of his sources other than the oral histories he used. Inexplicably, in his section on dogs, Victor used none of the knowledge or anecdotes provided in the oral history of a 112th veteran who served as a messenger dog handler at the Battle of the Driniumor River. While Victor's writing skills were mechanically adequate, there were some phrases or words Victor just did not use or spell correctly. For example, one year into the project and having been corrected multiple times by his

peers and me, Victor still wrote of “Calvary” as opposed to cavalry and “pidgins” as opposed to pigeons. Victor’s final input to the report was 10 pages of text.

*Mike’s final product.* Of all of the members of the expedition, Mike displayed the best grasp of military terminology, operational understanding, and factual mastery. Yet, his writing suffered from a lack of citations and references, emotional over-attachment to his informants, and the use of charged and biased language which betrayed those emotions. Mike was far from an objective researcher when it came to presenting his findings. He railed against “absurd orders,” and asked “Whose fault was it?” While nothing he said was incorrect, much of what he said was presented as if from a soapbox as opposed to an ivory tower. His lack of contextual knowledge caused him to rely too heavily on the words of the oral histories of troopers presenting a view of the war from a worm’s eye perspective as opposed to trying to understand the strategy of the theater commanders. Yet, in spite of all of that, the sections he wrote often received praise from those who reviewed the final product. Mike’s final input to the product was 24 pages of text.

*Delta’s final product.* The Battle of the Driniumor River was Delta’s primary topic for exploitation within our project. Having acknowledged her lack of interest in the military and her lack of knowledge regarding the military, Delta continued her work on the section of the report dealing with that battle. She provided an excellent geographic and climatic introduction of that area of operations to the reader. In addition, Delta did a good job describing the initial deployment of U.S. troops along that river battle line. Unfortunately, she never progressed beyond that point. By the time she handed her final product in to me, Delta provided no coverage of the combat which took place on

the battleground she had so aptly described. Delta's input to the final product was two pages.

*Charlee's final product.* With respect to her description of daily life at Forts Bliss and Clark, Charlee touches on a variety of factors that affected the troopers posted at those stations. Unfortunately, her writing suffers from a lack of illustration regarding those very factors. Written in the terse style of an encyclopedia entry, Charlee's description of those forts lacks interesting insights. From that perspective, quotations from oral histories, newspapers, records, or secondary sources could have aided her writing. In addition, she misses many opportunities to compare and contrast the two old military posts. While the mechanics of her writing and her adherence to style are exemplary, her written contribution to the expedition exhibits little in the way of contextual development, exploitation of sources, or depth of understanding with regard to the particular topics she wrote about. Charlee's input to the final product was four pages of text.

### Team Meeting 12

The expedition gathered for its last work session on August 7, 2005, in what had become the de facto expedition workroom on the second floor of my house. While not the last time we would be together, it was the last time we worked together on the final report.

I started the conversation by reviewing the material we had covered in April's meeting regarding the landing at Arawe. At that meeting, we had determined that several noted authorities included inaccurate information in their descriptions of the 112th Cavalry's operations at Arawe, New Britain. The worst offender had been the U.S.

Army Air Force (U.S.A.A.F.) Theater Commander for the Southwest Pacific Theater. In his memoirs, he had: (a) inaccurately blamed A Troop for being hours late in its assault, (b) had incorrectly stated A Troop's mission, (c) provided inaccurate casualty figures, (d) minimized the threat faced by A Troop, and (e) demeaned the regiment's activities on its first day at Arawe while, at the same time, inaccurately reporting the air threat faced by the regiment and all of its supporting forces. That his memoirs were inaccurate with regard to the 112th's activities had been determined by the teenagers at that April meeting. It was accomplished by gathering information contradictory to his memoirs from the deck logs of the landing force, oral histories, newspaper accounts, the landing field order, interviews, climatic data, and official histories of the U.S. Army, U.S. Navy, and U.S. Marine Corps, as well as captured Japanese records and diaries. That the U.S.A.A.F. commander had inaccurately reported A Troop's activities during its rubber boat assault in his memoirs was unfortunate. That the U.S.A.A.F. commander's memoirs were the official record of the U.S. Air Force regarding the Southwest Pacific Theater was more troubling (Kenney, 1997). My sense was that my co-researchers were unaware that they had information they could contribute to the community with regard to the 112th Cavalry. While I knew they were aware of the narrative history they were writing, I was less convinced that they knew how to address the community of practice regarding their knowledge. It was for that reason that I conducted the review of what we had learned in April. Once I had completed my review, I asked, "Knowing that I have information which disproves that of an accepted authority in military history, what is my responsibility to history?" Several of the teenagers' responses surprised me.

As my co-researchers talked and I listened, it rapidly became apparent that there were two schools of thought. The opinion of one school was immediately voiced by Juliet when she said, "To make that known." The other school of thought was represented by Charlee. She responded to Juliet's comment by saying the correct approach was "to keep it quiet." My response to Charlee was to ask why it should be kept quiet. Charlee said, "Because that would mean changing everything that everybody knows." Something in Charlee's tone of voice caused me to suddenly understand the root cause of her concern. I responded, "If you can question the official Air Force history--" and I never got any further. Charlee completed my sentence by saying, "--You can question everything." I realized I had been correct in my supposition regarding Charlee's aversion to publicizing a revision to well known history. To revise the history everyone knows would be to ask her to alter her schema which helped her deal with the world. I responded by asking, "So, what is the accepted way to let the world know that you may not know as much as an authority overall, but in one, little, skinny, area you are more of an authority than that individual? After a few moments silence, Mike responded, "Put an article in a journal." Charlee was dissatisfied with that approach and said, "Maybe you could tell him that he should write another book saying the correct information." "He is long gone; General Kenney is long gone," I said. Juliet observed that how the word got out was less important than the fact that it get out.

I was amazed that one year into the project there were expedition members who felt it was wrong to correct inaccurate portions of history. Charlee did not see the place for the evolutionary development of history if the evolution was the result of a revisionist approach. She was unable to accommodate change in the existing historical record. My

next question sought to bring the discussion down a path which might reveal my co-researchers' epistemological and ontological beliefs. The following excerpt relates how that conversation progressed:

- Glenn: When you do a paper in history, and let's presume that you have a subject that you like, what are the characteristics of that paper?
- Delta: The heading. The introduction and body.
- Glenn: Heading, introduction, body, conclusion. What separates a history paper from most others?
- Charlee: It has a lot of facts.
- Liz: Probably a chronology.
- Glenn: It is chronological, and it has a lot of facts.
- Delta: You can't really add anything new.
- Charlee: Yeah.
- Mike: What did we just spent two hours talking about?
- Glenn: Mike, that is very interesting question. I think history would be much better served if I told you that I would rather have one good footnote in a short paper than no footnotes in a lengthy paper. I would rather have you write a paper that had one good footnote that said, 'Based upon my research, I question whether this occurred in that fashion.' Then, literally just write the citations involving the research that you did in order to generate that footnote. One good footnote like that tells me that you are really doing history....One good footnote can advance history because you can say that maybe something is not set in concrete. Maybe there is still some more to be said about this.... (Team meeting, transcript excerpt, August 7, 2005).

### Publication

The primary objective of our history expedition was to publish a narrative history of the 112<sup>th</sup> Cavalry's activities during World War II. While two works existed with regard to the 112<sup>th</sup> (Drea, 1984; Powell, 2002), each provided information regarding a particular time period within the war, not a narrative of the 112<sup>th</sup> Cavalry throughout the war. Our narrative would cover the story of the regiment from November 18, 1940, through January 17, 1946, the period which marked the official tenure of the regiment as an

active, federalized, cavalry unit during World War II. Our plan throughout the effort was to write a history of the 112<sup>th</sup> Cavalry in World War II, have it printed with a hard cover binding, and present it to the Texas Adjutant General. The most senior National Guard officer in Texas, his was the logical office to make use of that history.

Setting the date for the presentation of our final report was no simple matter. Initially, the plan had been for the Texas Military Forces Museum to coordinate with the Adjutant General's office and to find a place on his calendar in the timeframe of early June 2005. By April 2005, I realized we were behind schedule and would most likely not be ready by June. Just as I was coming to that conclusion, my contact from the Texas Military Forces Museum e-mailed me to say that a June meeting was not a possibility. The Adjutant General was retiring and there would be a change of command of the Texas National Guard in that timeframe. I asked if September 2, 2005, was a possibility, and he said he would check.

Over the course of the next five months, we tried to procure a place on the Adjutant General's calendar. To say that we were understandably a low priority is an understatement. At the same time as the Adjutant General was dealing with getting his feet on the ground the Texas National Guard had forces deployed to the Persian Gulf. In fact, one those units was the 112<sup>th</sup> Armor of the Texas National Guard, offspring of the original 112<sup>th</sup> Cavalry. Then, Hurricane Katrina hit the Gulf Coast area, causing Texas National Guard forces to be deployed to New Orleans, Louisiana. Finally, the Texas Guard was deployed within its own state to control the flood of Hurricane Katrina refugees arriving at the emergency shelters of southern Texas. As soon as circumstances permitted, however, his staff promised we would be able to conduct the

ceremony. From my perspective, having been a general's aide, I was aware of the tight schedule and competing interests vying for a general's time. I advised his staff that we did not need too much time. If we could just come to his office, hand the monograph over, and shake hands all around, we would be happy. Finally, his staff found a place on his calendar for our presentation. We went to Austin to present our monograph to the Adjutant General on Tuesday, November 29, 2005, at 10:00 a.m. in the Texas Military Forces Museum.

We arrived in Austin the night before the ceremony. My teenage co-researchers had received the day off from school in light of the honor they were about to receive and the presentation they were about to make. The morning of the ceremony, we left our hotel, had breakfast, and then drove to the Texas National Guard headquarters at Camp Mabry in Austin. That was also the location of the Texas Military Forces Museum where our ceremony would take place.

The kids looked wonderful all dressed up. Mike and Victor wore suits for the occasion, and Charlee, Delta, and Sierra wore dresses. Unfortunately, Juliet was unable to attend due to a conflict between our ceremony and an examination in her Advanced Placement Physics class and a project in her Advanced Placement Computer Science class. For good reason, the teenagers were anxious all through breakfast and the ride over to the museum. They knew this was going to be a little bit more than dropping the monograph off, shaking hands, and leaving. At the Adjutant General's request, each student had prepared a five-minute talk addressing what the 112<sup>th</sup> Cavalry project meant to him or her. Also, unbeknownst to the teenagers, the general's staff had requested I



supply them the teenagers' names as well as a draft letter of commendation for the general's signature.

When we arrived at the museum, we were greeted by the museum's new director and led to the reception hall. There, we realized this was going to be a bigger event than we had thought. The room was arranged with a podium at the right front, 50 folding chairs for attendees in the center, and along the back wall there were refreshments. Directly in front of the audience seats were two leather upholstered armchairs, one for me and one for the Adjutant General. While I was surprised at the preparations that had gone into the event, a bigger surprise was the people who were there. When we walked in, there was a contingent of 10 people from the 112<sup>th</sup> Cavalry Association, about 10 people from the museum, and several enlisted personnel. This was far more involved than simply the Adjutant General, his aide, his chief-of-staff, and his assistant that I thought would be at the ceremony. As I was speaking with a few of the veterans from the 112<sup>th</sup> Cavalry and their families, we were asked to stand by for the Texas Adjutant General, Major General Charles G. Rodriguez. From outside the reception room, there came the unique martial sound of multiple sets of boots striding with a measured step across the museum's floors. All of the individual's heading our way were in step and walking with great purpose. With that, the Adjutant General and his entourage swept into the room.

Those of us from the expedition had formed an impromptu reception line by the entryway. We had donned nametags, so the guests could see our names. As Major General Rodriguez came down the line greeting each project member, I realized he had brought his entire staff. Behind the Adjutant General, wearing his two-star rank, came

two one-star generals, three colonels, several lieutenant-colonels, and the Command Sergeant Major of the Texas National Guard. Each of them came down the receiving line and greeted us. The museum director called the event to order and asked everyone to be seated.

As the ceremony began, the museum director introduced the various dignitaries and immediately announced the reason for the event. I was called forward and on behalf of my co-researchers, presented him the bound copy of the expedition's final report: *We Ain't No Heroes: The 112<sup>th</sup> Cavalry in World War II*. Major General Rodriguez gratefully accepted the monograph on behalf of the State of Texas. He commented on the timeliness of the presentation and the meaning it would provide to those soldiers of the modern 112<sup>th</sup> Armor serving in Iraq at the time. He informed the audience that each of the students had prepared comments for the event, and he asked the students to come forward and speak. Following are the comments of the teenagers as they were delivered that day. Charlee addressed the audience by saying:

The past two years that we have spent on this project have been a great and interesting learning experience for me. I have never participated in something where there was no beginning. We had to create it. It's amazing to do something original, and I never knew that I could get so involved in history.

It was fun to learn that your local area is a part of history; that the 112<sup>th</sup> Cavalry had soldiers from parts of Fort Worth and Dallas. That's where I'm from! The Depression and World War II affected my own city. Textbooks couldn't create the realistic affects that personal interviews portrayed. Hearing the voices, the emotion that the men had, that made history real. I could believe this more than a textbook.

Seeing them in person at the reunions. Wow! Before this project, I would have looked at them and just thought they were nice, old men. But after researching their time in the 112<sup>th</sup>, I could see that each of them survived the war. They were involved with people like General Douglas MacArthur, and they had patrolled the jungles of the Driniumor. Now I could match the interviews I read and heard with the faces of the men in front of me.

To gather the information about the 112<sup>th</sup> Cavalry, we dug up every detail about the Texas National Guard and its involvement in the war. We went from small articles in aged newspapers to reenactments of the battlefield. And those reenactments at the Living History Unit in Fredericksburg really helped me picture these men in action. The noise of a Browning Automatic Rifle and the heat of one of the last existing flamethrowers really captivated me. History in action! I feel lucky to have been able to see such an act, since many museums don't have the support to fund such an attraction. It showed me how much war has changed. Back then, soldiers were face to face with the enemy; we had the Springfield and the Japanese still used swords. Now we don't even touch the enemy. We have such advanced tanks and artillery that we hardly acknowledge a bayoneted rifle as being a useful weapon.

I'm glad I had the opportunity to participate in this project. Not just to be a co-author of a book, but to also learn that history can be entertaining and fun when you get to collect the info. In school, we learn what's in the book and take a test. We don't ask questions because the only thing you need to pass the test is in the book. We aren't challenged to dig further into the topic, because it's not necessary for our GPA. This project was definitely time consuming, but I learned a lot and am glad I did it. I am excited that the 112<sup>th</sup> Cavalry finally has their official mark in history (Charlee, speech at presentation ceremony, November 29, 2005).

Victor addressed the attendees concerning his experience:

When I went into this project, I, honestly, wasn't quite sure what I was getting into. I knew what we were doing, but I had no idea about the magnitude of the project and how much I would learn from it. At our schools today, history projects are considered something you can accomplish in under two hours without moving from your computer seat. But to actually experience a true research project was extremely educational. The first hand research we learned to do, like interviews or reading through personal accounts, put a lot of depth into the material we were writing about. It showed me how to take facts and make them more meaningful.

The history we normally learn during class is very factual and often boring for a student. But when you engage yourself in a topic and throw yourself into it, it suddenly becomes a lot more interesting. I realized this halfway through the project when I chose to research the animal portion of the 112<sup>th</sup> Cavalry. I had wanted to become a veterinarian through college, so animals were naturally something in which I was interested. As soon as I began to write about history from a point of view I found intriguing, the project seemed to take on a whole new meaning. Perhaps if our schools could learn to use this teaching technique, students would be able to get more out of their studies.

Besides research techniques, there were also more personal lessons I learned from our research. Attending the 112th Cavalry reunions allowed me to learn about the comradeship that the veterans still possessed. You never really get a

grasp for the kind of bond these people made with each other during their time in service. But when you see them at such an old age, still joking like they used to years ago, it shows you how connected they really must have been.

The 112<sup>th</sup> Cavalry is a part of World War II that not many know about. Before starting this project, I probably would never have even considered the thought of there being a horse cavalry during World War II. History textbooks often just show pictures of tanks and planes, but never horses and donkeys. Going into such a detailed portion of this gigantic war allowed me to take on a whole new perspective. If our group was able to do this much research simply on a single cavalry unit, imagine how much information there is still out there that needs to be recorded on World War II. We won't always have these veterans around to give us first hand accounts of what happened, yet there's still so much we could learn from them.

Historians are extremely vital if we want to remember our past. Through this project, I was given the chance to become a historian and help preserve, in my opinion, a very important part of our country's history. The challenges I've gone through have broadened my educational horizons and allowed me to take a new view on World War II (Victor, speech at presentation ceremony, November 29, 2005).

Delta addressed her experience by saying:

This project was the most rewarding experience I have ever had. When I first heard about it, I thought that I was just going to look through some old books, meet a few old guys, and write down a fact or two. Although most of that was true, I never expected to gain as much appreciation and knowledge as I did. Not only did I meet a few men, but I met the men that I actually read about! I met the men that had fought at the Battle of the Driniumor River and had been at the rubber boat landing. It was incredible!

I also read through hundreds of pages about the 112<sup>th</sup> Cavalry and World War II. I learned that many of the soldiers had not received a high school education due to the Great Depression and having to leave school to work at a very young age. Having little money and living in a small town, the Texas National Guard appeared to be a chance for the men to make something of themselves and would be a better alternative than being drafted into the Army. In the Guard, one could bet that he would stay close to home and would not get killed in a mission. That idea had come to an end, however, because on November 18, 1940, the Texas National Guard went into federalized service. The men were shipped overseas and became the only mounted unit of the United States Army.

By reading so many documents about the same topic, I realized that you couldn't trust everything you read. Articles in newspapers greatly exaggerate and revise the event and some authors get their facts confused or have a different opinion about the subject. In our school's history class, you just read from a book given to you and take a test over a chapter (which you soon forget about a month later). This project was much different. The things that I read about and saw will

stay with me for a long time. I learned that one small event in history has a great impact on many other people and events. I used to think that I was pretty good at writing essays, but a historical essay is much harder than any English essay. You have to make sure that all your facts are straight and that you sourced everything in it.

Even though it was tough, I am glad I was a part of the project. The men that I met at the two 112<sup>th</sup> Cavalry reunions were very friendly and you could hear the emotion in their voices when they spoke of their war experiences. They were very close to each other and fell silent when the list of their deceased comrades was read. They didn't care if anyone saw them cry. I had a sense of what they had gone through, since I had attended the Island Assault demonstration in Fredericksburg, and was able to see and hear the authentic weapons and uniforms of World War II. The shots were piercing and they were coming from every direction. The men were very brave to have endured all those years of active duty and be able to live with the memories of those terrifying times. I will always be grateful to them (Delta, speech at presentation ceremony, November 29, 2005).

Mike spoke to the attendees as well:

Until this project, I never really knew what the National Guard was. I didn't know what they did, who they were, or why we had them. This project taught me about what the National Guard is, and what its purpose is.

Since I had to live with the project leader since he became interested in the 112<sup>th</sup> Cavalry, I got to hear all about the 112th at the dinner table, on long drives, and even when I was trying to speak to my friends. It was endless. So, I knew a lot about the 112th before I was ever recruited for the project. But, the project clarified most things that I had been hearing about; Woodlark Island versus Driniumor River, Arawe versus Leyte, and an LVT versus an LSD.

The project also allowed me to meet the men my father was talking about at dinner and to get to know their stories better. Meeting them was wonderful, because it put faces and voices to the project, which we, as a team, would not get if we were just reading information from a book. That is one of the bonuses of, not just this project, but any oral history project. You find out that the men are an extremely close group of soldiers. Their wives and children have no idea how close the men are. They light up when they come to the reunions. It's hard to not find a smile on the face of the men, except when the list of men who have passed away is called.

Doing history in this project is a lot harder than memorizing it, and filling in answers on a test in class. Doing history can be painful, but it's a better alternative than just sitting in class and doing nothing but looking at vague information in a textbook. No public school could possibly reach the depth of the research we did. Few undergraduate programs get as deep into a particular subject as we did. I learned that though I'm not one to enjoy doing so much research on one topic, I realized that it had to be done. The stories of the men

had to be preserved, because just like snowflakes, every man's, every Troop's, and every regiment's story is unique and should be seen.

Even now, parts of the project are hard to remember, because they seem to melt all together. The living history display, though, is clearer in my mind and was very useful in understanding tactics that would have been used against the enemy. The reenactors also showed, though on a small scale, how confusing it can be in an assault. I can't even imagine what it would be like in a full scale assault, with hundreds of weapons firing, as opposed to a dozen.

I can assure you that although it was a long and tough experience to go through, I learned that it's the little blips in history--the things that don't fit together, that is what research is all about. In school, all we learn about is the story. We never learn about the disagreements between historians regarding the story, the incorrect parts of the story, or how to verify the story. We never learn about the footnotes. Footnotes in history are what teachers and undergraduate professors should be teaching us now, as opposed to when we become graduate students. It's the footnotes that make history interesting. It's the footnotes that show how history operates. Even if our report is only a footnote to the history of World War II, it is a footnote I helped research, write, and publish (Mike, speech at presentation ceremony, November 29, 2005).

The last expedition participant to speak was Sierra. Here is what she had to say:

Being a senior approaching the college years, I have found myself scrambling to write essays and finish up college applications. Oddly enough, I have found my experiences with the 112<sup>th</sup> Cavalry creeping into my essays. Even more fortuitous is the fact that I am going to be able to incorporate an essay I spent weeks perfecting in my speech today.

To a left-brained science geek, the idea of history sparking even the most miniscule interest seemed unfathomable. Yet, after months of research delving into the lives of the men of the 112<sup>th</sup> Cavalry of the United States, I developed a certain respect and appreciation for both oral historians and soldiers.

Our objective as novice historians was to record a history portraying the lives of the men of the 112<sup>th</sup> Cavalry, who were in the last mounted cavalry to be shipped by the federal government overseas. Our group leader planned to observe how well high school students adapted to primary source documents and handled a university level assignment. So, our project began and soon took priority over one of our last summers at home.

In the beginning, the process was as painful as the sweltering Texas sun outside our workroom, filled with 300-page oral histories. However, on the weekend of October 15, 2004, everything changed. The project group decided to volunteer at the 112<sup>th</sup> Cavalry Reunion, which was attended by many of the soldiers whose oral histories we had read. At first, there was a feeling of apprehension. The idea of singing World War II songs with strangers and mingling with men who served

so long ago in the United States Army was quite intimidating to this eighteen-year-old from a small town.

Amazingly enough, by the end of the weekend, a certain feeling of comfort could be elicited from the faces of those men and their wives. Simply from having read their oral histories and observing the men in a memorial service, a sense of belonging drew all of us into their world and their stories. I began to feel like I was visiting distant relatives with whom we shared humorous anecdotes about getting lost in the park. Even one of the men, Riley Chennault, to be congenial, came by our table and gave each student a piece of Big Red chewing gum.

The unveiling of my interest in right-brained subjects began with a simple invitation from an oral historian and continued in stages. The first step was the reunion and the constant thanks we received from the men and their families for preserving their little-known accomplishments. Then, there was another step on Memorial Day when the group traveled down to the Pacific War Museum in Fredericksburg and donated a flowered wreath in recollection of the outfit. The layers continued to build toward an incomparable experience linking me to a few of the men responsible for this nation's protection and well-being. Ultimately, I, a teenage girl, spent my high school career building my mathematics and science talents, only to discover that I became a more well rounded person when I was not only a left-brained science geek, but also a right-brained historian (Sierra, speech at presentation ceremony, November 29, 2005).

#### Audience Reviews of the HWB Project's Product

Within the community of practice of history, it is the professional historians who generally hold the most central position (Thelen, 1994). Consequently, it was logical they be the ones to assess the value of the project's product with regard to the community of history. Professional historians working in the area of military history were asked to read the monograph that was the project's final product. Then, among other things, they were asked to professionally assess whether the monograph could be accepted "as a piece of history." Reviewers received a copy of *We Ain't No Heroes: The 112th Cavalry in World War II* in its draft form. Draft copies were sent to reviewers because they were largely unedited and contained errors in style. As such, they offered reviewers an insight into the authentic product produced by the expedition's participants. In addition, each reviewer received a description of the HWB project

philosophy, a description of the activities in which the expedition engaged, as well as Internet links to materials which served to corroborate information regarding the expedition and its purposes. Reviewers were asked to provide comments on the draft monograph with regard to its strengths and weaknesses as well as their thoughts on the process by which the product came to fruition. When returning their comments, reviewers were requested to include an executed copy of the human subject research consent form which had been packaged with the monograph.

The overall response rate to the 100 surveys mailed to all categories of the audience (veterans, families of deceased veterans, military historians, active military personnel, award-winning high school teachers) was 30%. The response rate from military historians was six of ten queried (60%). None of the historians' responses was negative with regard to the monograph's acceptability as a piece of history. One historian associated with the Army National Guard commented, "This project is very valuable to students of World War II history...Not only is [it] history--it is good history, valuable both now and 100 years from now."

The director of a national museum of military history said:

Your teenager's book is as close as we can get to the real event...[It is history because] it captures the essence of those who lived a reality that we look back on as history...It allowed a fragmented grouping of memories to act as a framework for a student-written narrative that was well organized and cohesive. While it told the story of a bunch of individuals, it also told the larger story of a group of people sharing the same reality...(Administrator, Army Heritage Center, personal communication).

After review, the United States Military Academy placed the monograph in the academy's research library, as did the National Guard Bureau and the Army Heritage Center and Museum.



One response was more circumspect than those above with regard to whether the teenagers were historians and whether their product could be called history. The Army War College faculty member, said:

Yes, [it is a piece of history] with emphasis on the 'piece of history' part. It is not the sum total of the [regiment's] history and provides only one piece to what is a very complex puzzle. It provides an appreciation for what young men of the '40s experienced as they were called to war. It gives glimpses of attitudes and prejudices of that decade. It gives examples of how men dealt with their experiences. But it remains only a piece of the larger picture...(Faculty member, U.S. Army War College, personal communication).

In his response, he addressed his concerns regarding the engagement of teenagers as historians. He said, "To call them historians adds a title that is not appropriate...they are certainly not historians at this point...There is a measure of education and academic discipline that has to be applied to create the proper critical analysis skills a historian needs."

Yet, in his response the professor also observed that the expedition's product captured information that is unique in the military histories of that time and place:

Sections III and IV [of the monograph] contained the type of information that is not normally captured in histories of the time. Even in the histories already written, very few are written from the Pacific theater point of view. The oral histories of the veterans concerning deployment and their day-to-day life are absolutely invaluable in understanding what units such as [this regiment] experienced during the war (Faculty member, U.S. Army War College, personal communication).

The monograph in its draft form was also sent to other experts for review. Each of the other experts was one of the following: a 112th Cavalry veteran, a family member of a deceased 112th Cavalry veteran, a veteran of the post-Vietnam U.S. Army armored cavalry, or an award-winning teacher. Another recipient was an individual with expert knowledge of situated learning.

Veterans of the 112th Cavalry were familiar both with the activities of the expedition's participants and its draft final report. From that perspective, they were in a position to comment on both the monograph and the process by which it was created. As might be expected, every response was a glowing endorsement of the work the teenagers had accomplished. Family members of deceased 112th Cavalry veterans were all appreciative of the monograph. Some said as little as, "This book is important to me...Thank you." Others provided information concerning how the expedition's work had touched them,

I'm sure it means a lot to all of the families whose loved ones had a connection to the 112th. I know for my family it was important to find out about our uncle...and what he went through until his death at Arawe....The students that assisted you on this project did an excellent job and are to be commended for their hard work and dedication (Family of 112th veteran, personal communication).

One highly decorated senior officer, himself a veteran of the post-Vietnam U.S. Army armored cavalry said,

This is an authentic and well-done collection of first-hand accounts of significant events, organized and presented in usable form for both reading and research. Projects like this are very valuable because they educate people about their community's past. Involving teenagers in writing this history is a good idea because it improves their understanding of the writing of history and of the biases, errors, and opinions of subjects that complicate a historian's work....I liked the first section because it sheds light on a relatively obscure part of military history....This was a great idea for a study and the resulting report is very good--especially in light of the lack of scholarly historical training of the students (Retired Lieutenant General, U.S. Army War College, personal communication).

Another combat veteran of the modern cavalry said,

I am inalterably convinced that engaging teenagers as historians is a superb concept. These incredibly bright, motivated, and insightful young adults have done a masterful job of capturing the essence of the troopers who served with such distinction in the 112<sup>th</sup> Cavalry Regiment. They individually displayed a depth of understanding of the veterans and war that only a miniscule amount of their peers will ever have....This book was a great read--its prose was spare and compelling and its eloquence constantly impressive.

While many of the foregoing testimonials were received from individuals with a great amount of knowledge and experience regarding military history, award-winning teachers also responded enthusiastically to the expedition and its product. The following is from an Advanced Placement English teacher with over 30 years experience in high school classrooms. An historian himself, his experience includes operating in an environment in which English and history are co-taught as part of a humanities approach to learning for honors students. He observed,

This is an outstanding and valuable project which is a contribution to the historical archives of the community. With pride and scholarly research, the writers have put the 112<sup>th</sup> Cavalry, Texas National Guard, on the map. The oral history excerpts are priceless and the project final report reads more like a novel but is entirely non-fiction. Any serious reader would have to accept this report as a solid piece of historical research. The training of the horses and equine logistics were narrated with convincing articulation. It seems that every aspect and avenue of inquiry of the students was meticulously researched. It is a tribute to the writers. This is an outstanding piece of historical work--replete with eyewitness testimony and scholarly notes. The teenagers need to know that they have done a great service to the 112<sup>th</sup> Cavalry and the State of Texas. This is not your normal regurgitation of a plagiarized assignment, but a solid thesis worth studying and remembering. I loved it! (AP English teacher, personal communication).

While all of the above informants were qualified to address the expedition with regard to its product and some were qualified to comment on the process, none was qualified to provide feedback regarding the situated learning and curriculum of identity components of the HWB concept. There was, however, one subject matter expert who could address that topic. He commented,

Yes, this type of experience falls exactly in the realm of what I had in mind when I talked about learning as a journey of the self. Whether these kids end up studying history or not, you have changed their lives forever. You have opened their identities with the gift of yours. The whole thing was quite moving. I am not a historian, or a party to the story you have written about. I don't think I can add much content-wise....From an effect standpoint, your kids have had a lot of limelight shone on them. They know they have made a difference. They do not

really need additional confirmation from an impressed learning theorist, who is impressed anyway (E. Wenger, personal communication , February 24, 2006).

### Summary

Chapter 4 presented the major findings of this study based on data collected with regard to the four research questions pursued by this investigator:

1. How do participants and audience describe the history expedition experience?
2. How does a community-based, extracurricular history expedition enable teenagers to engage in the practice of history?
3. In what ways does an out-of-school history expedition lead to outcomes similar to those the National Education Association (NEA) (1893) associated with the intensive study of learning?
4. What is the relationship between the lived experience of a community-based history expedition and Lave and Wenger's (1991) theory of peripheral participation within a community of practice?

Findings were presented in the chronological and conceptual order in which they occurred, an approach important in an intrinsic case study, as opposed to the topical order enforced by strict adherence to the research questions. An important rationale for this decision was that if the expedition participants' ability to practice history was transformed over time such a change might be more readily reflected in a chronologically rather than topically ordered narrative. By presenting findings in a chronological order, important contextual information necessary to understanding the evolving nature of the case was maintained.

The findings were drawn from a variety of data sources. Those sources included participant interviews, transcripts of recorded working sessions, my observations as recorded in his journal, documents created by the participants in draft and final form, project records, photographs, video files, artifacts, and comments from the project audience. Dialog presented in the findings which was reconstructed from notes in my

research journal was a paraphrased version of an actual conversation not captured on tape. Dialog resulting from audio tapes was processed according to the Oral History Evaluation Guidelines (Oral History Association, 2000). In general, transcripts were an accurate reflection of the dialog which occurred.

Specific findings were drawn from: the expedition kickoff meeting; two trips to the Museum of the Pacific War in Fredericksburg, Texas; a research trip to the Texas Military Forces Museum, Austin, Texas; attendance at a regimental reunion; 12 team meetings; 10 individual interviews; and written artifacts including, but not limited to, oral history highlighting assignments and summaries, reflective papers, participant speeches, and draft versions of each participant's research papers.

In the fifth and final chapter of this study, I will summarize the findings of the study arranged according to research question, exact conclusions from the findings, develop inferences based on those conclusions, and provide recommendations for further study.

## CHAPTER 5

### CONCLUSIONS, IMPLICATIONS AND RECOMMENDATIONS

#### Summary of Findings

##### *Introduction*

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### *Specific Findings*

*Participant descriptions of the experience.* While the objective of the history expedition was the publication of a narrative history of the 112th Cavalry during World War II, individual contributions toward that objective were largely self-determined as were the activities the expedition engaged in while pursuing that objective. Being a volunteer program, the determination of exactly what an individual contributed to the effort was based on that individual's personal motivations, objectives, and abilities, not a demand by the expedition leader. In a variation on the famous quote by Marx (1875), it seems the expedition worked according to the following implicit dictum: From each according to their motivations and abilities, to each according to their contributions. In other words, participants contributed to the effort what they felt they wanted to contribute and got out of the effort what they had put in.

Juliet and Sierra were voracious in their desire to learn about the men, the horses, the unit, the war, and posed a variety of questions regarding not only their research topics but others as well. While their participation touched on all aspects of the expedition, it was through their academic contributions that each made her mark.

On the opposite end of the participatory spectrum were Charlee and Delta whose academic contributions were minimal when compared to the significant contributions each made in other areas pursued by the expedition. With their orientation toward people and the social aspects of a community, Charlee and Delta excelled in those social situations which required public speaking, ceremonial functions, and other such representations to the public. Thoroughly enjoying one-on-one interaction with veterans, historians, and others outside of the project team, Charlee and Delta became the public face of the expedition. Located in-between the academic contributions of Juliet and Sierra and the social contributions of Charlee and Delta were the contributions of Victor and Mike. Although Juliet and Sierra had personal research interests, they were willing, able, and showed interest in pursuing other research topics as needed. Mike and Victor, on the other hand, focused on topics of personal interest which consumed their interest and tested their abilities. While Victor and Mike made significant academic contributions to the expedition, their academic contributions were eclipsed by those of Juliet and Sierra. Victor and Mike, however, to a greater extent than Juliet and Sierra, made significant contributions to the civic and social side of the expedition. With Juliet and Sierra spearheading the academic effort, Charlee and Delta the social obligations of the expedition, and Mike and Victor reinforcing both those areas, it took the efforts of all of the participants to make the expedition work.



The format of the project as a history expedition without borders allowed the expedition to go in directions which interested the participants and led to a final product largely determined by the individuals involved. The expedition called for the execution and completion of tasks related to academic history, public history, genealogy, and civics. It required skills in the areas of research, writing, public speaking, interviewing, active listening, and historical empathy. In addition, it demanded commitment on the part of its participants to the extent that the expedition's activities could be undertaken as required. Finally, it required six teenagers to act with a maturity which would earn the respect of archivists, research librarians, curators, reenactors, combat veterans, general officers of the Texas National Guard, and members of the Texas Legislature. No single member of the expedition, including me, could have fulfilled all of those requirements. The collaborative format of the history expedition model provided a venue for harnessing the various personal motivations, interests, and abilities of the expedition members toward pursuit of a specific objective while, at the same time, providing individuals the opportunity to be themselves and contribute as they could to the expedition.

*Audience descriptions of the experience.* From the perspective of its participants, the 112th Cavalry history expedition offered an opportunity to preserve and publish a narrative history of that regiment's activities during World War II. Direct beneficiaries of that effort were the veterans, their families, the modern 112th Armor whose lineage led directly to the 112th Cavalry, and the State of Texas. Indirect beneficiaries of the expedition's product were military historians in general and cavalry subject matter experts in particular. When seen from the perspective of professional educators, the

history expedition was a modern history seminary (Adams, 1905) instituted as an extracurricular project. Their perspective, that of high school teachers, college professors, and public education professionals, was valued by me. Consequently, copies of the final report, *We Ain't No Heroes: The 112th Cavalry in World War II*, were mailed to representatives of that audience. Representatives were chosen based on the positions of authority they held within their subcategory of the audience.

The overall response rate to the 100 copies of the draft final report mailed to all categories of the audience (veterans, veterans' families, the Texas National Guard, military historians, cavalry experts, high school teachers, college professors, and public historians) was 30%. The response rate from the specific subcategory of military historians was six of ten queried (60%). As might be expected, the veterans and their families responded with glowing tributes to the efforts of the expedition's participants. The vast majority of the comments made by military historians were positive. For example, when asked if the final product could properly be called a history, a nationally recognized military historian responded by observing, "Not only is [it] history--it is good history, valuable both now and 100 years from now." The director of a national museum of military history said, "Your teenagers' book is as close as we can get to the real event....[It] captures the essence of those who lived a reality that we look back on as history." Even in its draft form, the monograph was placed in the research libraries of the United States Military Academy, the National Guard Bureau, and the Army Heritage Center and Museum. One historian offered a more guarded response by observing, "Yes, [it is a piece of history] with emphasis on the 'piece of history' part. It is not the sum total of the [regiment's] history and provides only one piece to what is a very

complex puzzle.” In addition, while admitting that the final report was a piece of history, even if not a total history, he rejected the idea that the expedition’s participants were historians. He said, “To call them historians adds a title that is not appropriate....There is a measure of education and academic discipline that has to be applied to create the proper critical analysis skills a historian needs.”

Combat veterans of the modern armored cavalry, with combat experience from Vietnam to Desert Storm, were very enthusiastic about the expedition’s product. To them, it provided a narrative account of the horse cavalry before their time, yet a cavalry whose traditions the veterans had preserved from Southeast Asia in the 1960s to the Persian Gulf well into the 21st century. One highly decorated senior officer, himself a veteran of the post-Vietnam U.S. Army armored cavalry said, “This is an authentic and well-done collection of first-hand accounts of significant events, organized and presented in usable form for both reading and research....This was a great idea for a study, and the resulting report is very good--especially in light of the lack of scholarly historical training of the students. Another combat veteran of the modern cavalry observed, “Engaging teenagers as historians is a superb concept. These incredibly bright, motivated, and insightful young adults have done a masterful job of capturing the essence of the troopers who served with such distinction in the 112<sup>th</sup> Cavalry Regiment.”

Responses from the educational establishment were equally positive. An award-winning teacher with over 30 years experience in high school classrooms said, “This is an outstanding and valuable project which is a contribution to the historical archives of the community....This is an outstanding piece of historical work.” In their responses, the

educators focused on how different the participants' experiences must have been from a standard classroom experience and on the high quality of the contributions made by the teenagers to the final product.

Concerned that within the 70% of reviewers who did not respond was a pool of negative sentiment regarding the final product, I conducted follow-up contacts with non-respondents via e-mail and telephone. In the case of veterans and families, the obstacle to response was completing the required human subject research forms associated with their participation as reviewers. While all responded that they loved the final report, each was put off by the legalistic nature of the human subject research forms. In the case of educators and public history professionals, the issue was simply that they did not have the time to read the 312-page document and render an opinion. With regard to comments from the modern 112th Armor, they had deployed to Iraq for duty and were not in a position to respond.

*Participant reactions to various sources.* In their final evaluation document, the six teenage participants were asked to rate the various sources (e.g. official records, photographs, artwork, video, Internet, reunions, reenactments, oral history, Army histories, and other books) they used in the project according to how well they helped them learn individually. My co-researchers' responses reflected a generally strong opinion that reading veterans' oral histories, participating in regimental reunions, and attending living history reenactments were their most treasured sources of learning. Consequently, the teenagers identified those sources which provided the most human insights into the experiences of 112th Cavalry as being the most helpful and memorable. Specifically, oral histories, interviews, eyewitness newspaper and

magazine accounts, diaries, photographs, combat art, and regimental records with a strong narrative component were repeatedly cited by the teenager participants as their favorite sources of information. Although written in a narrative format, but usually removed from the first person, secondary sources were less likely to be referred to as valuable research tools by the teenagers. Artifacts were important to the understanding of equipment, weapons, and mounted operations as exhibited in the chapters written by Juliet, Mike, and Victor respectively; however, their importance was rarely mentioned by the teenagers.

*Participant reactions to various learning modes.* My co-researchers exhibited the ability to use all of their senses as they learned during expedition activities. Those activities they reported as enjoying the most were also those which called on the teenagers to participate by seeing, hearing, smelling, tasting, and feeling. For example, the living history demonstration in which reenactors assaulted an enemy position was always at the top of the list of the participants. Even with regard to the veterans' oral histories, my co-researchers spoke of how they the veterans' words could excite their individual senses and make them feel like they were there. Listening proved important as the teenagers listened to the words of 112th veterans, allowed lyrics associated with period songs to raise questions with the teenagers, and provided them the aural component of a firefight while at the living history demonstration. The ability of the teenagers to physically feel allowed them to sense the heat and humidity of the tropics on a hot day summer's day in Fredericksburg, Texas. It also allowed them to feel the instantaneous searing heat of a flamethrower, and the shockwaves from explosives and cannons at the living history demonstration. The smell of cordite, burning fuel, gun

solvent, sweat, and mildewed cotton introduced my co-researchers to the olfactory reality of Army life. Sight was the primary sense used to acquire information since it was used in reading and observation. Finally, time after time, the teenagers proved their ability to sense with their heart. Living so close to the veterans' stories for an extended period, my co-researchers developed both historical empathy for the veterans' experiences and sympathy for them as well. Not only did the expedition's participants know about the veterans, they cared about them as well.

*Evidence of teenagers engaging as historians.* Historians study the past in order to better understand, interpret, and communicate about the past. They make use of specialized content knowledge, tools, skills, and methodologies developed by their community of practice over many years and share a common commitment to their discipline's values. Their content knowledge derives from that which was gleaned from others who went before them as well as their own original research. Their tools include, but are not limited to, literature reviews, bibliographies, museum and archival finding aids, primary sources, secondary sources, and a wide variety of other, often highly specialized, reference documents. In the case of military history, such specialized tools include orders of battle, tables of organization and equipment, officer registers, official unit histories, climatic summaries, atlases, and reference books for military weapons and equipment. A historian's skills include the ability to: (a) think chronologically, (b) identify that which is significant, (c) evaluate sources of evidence, (d) identify corroborating and contradictory evidence, (e) interpret evidence, (f) develop narrative structure, and (g) communicate their findings. Their method is the historical method, a method defined by the development of a thesis, identification of multiple corroborating

sources in support of that thesis, identification and explanation of evidence contrary to that thesis, citation of sources, and publication of one's research for review by one's peers. With regard to shared values, historians support the conservation and stewardship of historical resources, provide support to the community regarding matters of history, and work to educate the public with regard to their fields of historical specialty.

All of the teenage participants proved their ability to work with primary and secondary sources. Each of my co-researchers exhibited a preference for using primary over secondary sources, but Juliet, Victor, Mike, and to a lesser extent Sierra, also made use of secondary sources in their research and writing tasks. To the extent secondary sources were used, the teenagers used them because they provided specific detail regarding some part of the 112th Cavalry's story as opposed to general context. While my co-researchers provided geographic and climatic context in their chapters for the reader, they failed to provide the strategic and theater-level military context for the 112th Cavalry's activities.

Participants were far better identifying issues that were significant to the regiment's narrative than they were at identifying regiment's significance to the war in the Pacific. They easily understood the historical significance of the 112th Cavalry as the last horse mounted cavalry regiment sent overseas in World War II, or the 112th's first use of the bazooka and flamethrower in the Southwest Pacific, as well as the 112th's involvement in first concentrated effort to use helicopters for medical evacuation purposes in the U.S. Army. As the project progressed, participants even grasped the significance of the 112th Cavalry's disparity in manpower when compared to an infantry

regiment on military missions the 112th was assigned during the war. Similarly, the teenagers grasped the significance of the 112th's status as a National Guard unit on its training, weapons, and personnel. However, the significance of the 112th's status as only one of two independent regimental combat teams available for use by General Douglas MacArthur in the Southwest Pacific Theater and his decisions regarding their employment was never grasped by the participants. While participants developed a limited ability to view the war in the Southwest Pacific through the eyes of the veterans of the 112th Cavalry, they never developed the ability to view the 112th Cavalry through the eyes its sister units, supporting units, and higher headquarters.

Initially, my co-researchers accepted everything they read as being accurate and faithful to the actual events. As they ran across items which were contradictory, they paid them no attention. Instead, they simply surmised that some participants had experiences which were different from other participants. During the team meeting in April 2005, however, at which the teenagers read and evaluated every source we had which described activities at Arawe, New Britain, on December 15, 1943, between 0300-1200 hours local time, they learned how to become more discerning in their reading of the documents. During the learning intervention that day, they were required to evaluate information from oral histories, memoirs, official records, translated enemy documents, newspaper accounts of eyewitnesses to the event, battle reports of ships in the area, battle maps, field orders, and secondary sources. As a result, my co-researchers were able to successfully (a) identify contradictory information and corroborating information, (b) identify sources of possible bias, (c) provide explanations for some of the contradictory information, and (d) develop a narrative of what probably



happened that day based on multiple sources of corroborating evidence. Their narrative revised earlier official accounts of the event based on an original analysis which used sources unavailable at the time the other accounts had been written.

My co-researchers were, to a lesser or greater extent, able to develop narratives with regard to the material they researched. Having said that, none of my co-researchers structured their chapters as arguments in support of a well-developed thesis. Instead, their work reflected the mission of the expedition which was simply to tell the story of the 112th Cavalry in World War II. That is not to say the teenagers did not make connections with today. Juliet was able to relate the experiences of the soldiers in the 112th Cavalry who experienced combat fatigue to current research on Post Traumatic Stress Disorder. Sierra was able to tease out of the data information regarding the experiences of minorities in the Army during World War II which is of interest today even though the data concerned events over 60 years earlier. Her interest in the experiences of minorities and non-combatants in the Pacific war is certainly a current research area in the profession, but she was able to avoid the trap of presentism in her treatment of the material. Juliet and Sierra provided inputs which were factually accurate, geographically and climatically contextualized, well researched, properly cited, and illustrated with examples in the veterans' own words. Juliet, in particular, made use of a wide array of primary and secondary sources in her writing. Mike and Victor provided chapters which adequately discussed weapons and war animals respectively, but their work reflected their dependence on only a few sources. Both Victor and Mike supplied information regarding immediate local context, and each illustrated their writing with quotes from the veterans. All of Victor's work contained citations, but only one of

Mike's two chapters contained citations. As strong as Charlee and Delta were in other areas of project support, writing proved their weakest area. Each provided short summaries which generally lacked hypotheses, context, detail, examples, and citations.

Expedition participants displayed a stewardship for history when they committed themselves to volunteer in order to fill a gap in the historical record. They engaged in public history when they delivered speeches at public events, created draft legislation regarding their research subject, interpreted their understanding of the 112th Cavalry's activities in World War II through the expedition's final report, and engaged in interviews with newspaper journalists and television reporters.

Throughout the expedition, the project team demonstrated that while none of them had all of the knowledge, skills, and abilities of a professional historian, distributed among them were knowledge, skills, and abilities which allowed the expedition's products to greatly exceed those commonly seen from high school age students. The most common observation made by outsiders was their surprise at how, in one year, the expedition exploited a number of hitherto unexploited sources, introduced legislation that was passed by the state legislature and signed by the governor, wrote an original piece of history, and communicated their new found knowledge through a number of high visibility outlets. The expedition provided an opportunity for practice in which the team's abilities truly were greater than the sum of its component parts.

The expedition's participants rapidly began to identify with their effort. Only two months after they began their work, they attended the first of two 112th Cavalry reunions in which they participated. While there, they acquired white baseball caps with the 112th Cavalry insignia and logo emblazoned on the front. Whenever the

expedition traveled somewhere, the teenagers proudly wore their hats. They were proud of their involvement in the expedition and publicly proclaimed their feelings. As the teenagers gave up more and more of their spare time in service to the expedition, it became the central extracurricular activity in their lives. Each of the expedition's teenage participants used the expedition as the subject for one of their two college essays on each of the college applications they submitted. While none of the teenagers felt they were historians, they each identified strongly with participating in the expedition which had as its objective constructing a historical narrative by way of historical research. Several participants discovered a part of themselves they never knew existed, a part which enjoyed the type of history in which the expedition was engaged. Similarly, a few participants discovered that a future in history was probably not for them. Regardless of what they discovered about themselves, all reported they discovered something about themselves they never knew as a result of their experiences with the expedition.

## Conclusions

### *Introduction*

This section will present my conclusions based on the evidence provided in Chapter 4 and categorized by research question. The category Other Conclusions includes those conclusions not addressed by the original research questions.

### How Do Participants and Audience Describe the History Expedition Experience?

Participants and audience alike described the history expedition as being unique, powerful, and a much appreciated event. While the teenage participants had lived through the expedition experience and could provide an insider's testimony regarding

what it was like to participate in the expedition, the audience could provide testimony regarding the expedition from the perspective of outside observers and product users. Although viewing the expedition from two different vantage points, both teenage participants and audience members observed the history expedition was different from anything they had experienced before.

Both participants and audience members observed that the structure of the expedition, the scope of its research, the expedition's commitment to authentic tasks and assessment, the performance of its teenage participants, and the quality of its final product removed the expedition from consideration as a typical high school class or high school project. The teenagers commented that they had never before been given the opportunity to construct their own interpretations of history to the extent the expedition expected them to, and that they had never been expected to undertake original research. Audience members were pleasantly surprised by the quality of the participants' products as well as the professional behaviors exhibited by the teenagers as they undertook their research.

The teenagers described how the high standards of performance associated with expedition challenged them and caused them to learn more about their own abilities. One participant observed that she had never been in a situation where she had to construct a piece of history from scratch. All of the participants commented that they were challenged by the amount of reading necessary to their research. All of the participants commented that the writing of their final chapters tested, and in two cases bested, their abilities. The teenagers observed that time management was an issue throughout the expedition and that for some time management skills were an asset

while for others a weakness. While the teenagers described the intellectual experience associated with the history expedition as being challenging, at the same time they felt it was highly rewarding.

Participants described the expedition experience as being highly rewarding for a variety of reasons. Foremost was the sense of pride the teenagers experienced as they provided a history for a proud military unit which lacked one. The teenagers observed that 112th Cavalry Day as enacted by the Texas Legislature and their final report *We Ain't No Heroes: The 112th Cavalry in World War II* went a long way toward creating a place in history for the veterans they had gotten to know so well. Participants took pride in their perception that the expedition had challenged them intellectually and that they had responded to the challenge. While none of the teenagers felt comfortable addressing large groups of people before they became involved in the expedition, by the time it was over, they had spoken at regimental reunions, memorial services, and they had addressed the senior leadership of the Texas National Guard. Similarly, the teenagers described the anxiety they had felt as they prepared to meet dozens of veterans at the 112th Cavalry Association Annual Reunion in 2004. By the time the expedition had ended, those same teenagers spoke of those elderly men as friends almost as welcoming as family members. The expedition was successful at creating a sense of pride and self worth among its participants.

The expedition's audience, beneficiaries of the expedition's work, was highly complimentary of the teenager's work. The audience included 112th veterans, their families, military historians, active duty and retired armored cavalrymen, public historians, and several award-winning teachers. In general, the veterans of the 112th

Cavalry and their families were appreciative of the work the teenagers had performed and the products of their efforts. Retired and active duty members of modern armored cavalry units were highly appreciative of the work the teenagers had done documenting the twilight of the horse cavalry and the beginnings of a new type of cavalry organization. Military historians commented on the significance of the expedition's work since it helped fill a gap with regard to the end of the horse cavalry, small unit operations in the Southwest Pacific Theater during World War II, and, in particular, events that took place in the Army's attack at Arawe, New Britain, in December 1943. Finally, teachers and public historians commented that they were excited by the new possibilities brought about by the history expedition concept. For them, the concept of a history expedition provided the opportunity to think of new ways of connecting with teenagers outside of school, new ways of exploiting resources public history institutions had invested in, and new ways of thinking about collaborative activities in history. Not only was the audience complimentary, it was universal in its acceptance of the expedition's final report as a piece of history that was significant and meaningful.

Even though none of the expedition's participants had a degree in history, it was the consensus of the audience that the expedition produced a final report which they accepted as a history which was significant in its findings. This was particularly true of the military historians who commented on the expedition's final report. Even the most critical comment regarding the final report, a comment from a faculty member of the U.S. Army War College which admitted that the final report should be considered a history and that it was significant, asserted that it was only a piece of the history of the 112th Cavalry. His assertion was based on his opinion that it was not a complete history

since not every subordinate unit of the regiment was covered nor were comments included from other Army units which had served alongside the 112th in the Southwest Pacific Theater included regarding the regiment's performance. Even taking that criticism into account, audience comments support the assertion that given the proper environment, provided the necessary resources, engaged in authentic activities, and mentored by individuals committed to their success, high performing teenagers working collaboratively can engage in original research which is significant in its historical findings.

*How Does a Community-Based, Extracurricular, History Expedition Enable Teenagers to Engage in the Practice of History?*

The ability of the history expedition to engage teenagers in the practice of history derived from its (a) mission, (b) structure, (c) organizational plan, and (d) operation. The expedition's mission was to construct a narrative history of the 112th Cavalry during World War II while, at the same time, providing participants the opportunity to practice history. The expedition's structure defined the educational and historical strategies which were used to meet the expedition's objectives. The expedition's organizational plan reflected how its participants thought they could complete their mission within the constraints of the expedition structure. Expedition operations were what the participants did to accomplish the mission through executing the organizational plan within the expedition's structured environment.

*Mission.* The idea of a research seminar undertaken in the form of a history expedition was first advocated by Webb (1955). In his efforts to describe the inner workings of a graduate seminar in history, he used the analogy of an expedition

undertaken in pursuit of a research objective in history. According to Webb, the function of a history expedition is to accomplish the expedition leader's research objectives while, at the same time, providing education to the expedition's participants regarding historical content, skills, and disciplinary knowledge. According to Webb, if meeting the objective is an expedition's fundamental mission, the fundamental way that objective is met is through the efforts of individuals in a structured educational environment who participate in an organized way. That which provides the structured environment and the organization is the expeditionary format

In the case of this history expedition, the expedition leader's historical research objective was to construct a narrative history of the 112th Cavalry, Texas National Guard, during World War II, which would be donated to the State of Texas through the governor or adjutant general. While accomplishing this historical objective, the expedition's teenage participants would be accomplishing the leader's educational objectives of learning content, skills, and structure associated with the discipline of history. The expedition would have one year to complete its mission. Given this stated function of the history expedition, certain items were clear from the start: (a) the expedition would serve as both a training ground and a production site; (b) the research topic was the 112th Cavalry during World War II; (c) the end product was a narrative history of that unit during the war; (d) the expedition would be populated by teenage participants; and (e) the expedition would have one year to meet its goals. Given the clear objectives of the expedition, the next step was to structure the expedition.

*Structure.* According to Webb (1955), a history expedition is structured as a scaffolded, mentored, collaborative research initiative involving fieldwork, seminars, and



individual research. The expedition leader is responsible for determining the expedition's initial research objective(s), locating sources of information, recruiting participants and sponsors, and providing an initial plan of operation. Once the expedition has been structured and populated by participants, it can be organized.

As part of the structuring effort for the 112th Cavalry history expedition, the expedition leader spent two years collecting materials apropos to the research topic. Veterans' oral histories, regimental records from World War II, personnel records, maps, photographs, diaries, and media accounts concerning the 112th Cavalry were located and photocopied. Inventories of finding aids associated with the 112th Cavalry were made at the National Archives, College Park, Maryland; the Naval Historical Center, Washington, D.C.; the Texas Military Forces Museum, Austin, Texas; and Texas A&M University, College Station, Texas; and the U.S. Cavalry Museum, Fort Riley, Kansas. A byproduct of that effort was a list of institutions that held information regarding the 112th Cavalry as well as contact information regarding gatekeepers at those institutions. In addition, contact was made with the veterans themselves through the 112th Cavalry Association.

Second, in order to accomplish the expedition's historical objective, the expedition was structured to engage teenagers as historians. Based on Lave and Wenger's (1991) theory of situated learning as peripheral participation within a community of practice, expedition participants were provided opportunities to engage in the practice of history. By engaging in historical research the expedition's participants learned about the 112th Cavalry during World War II, what led the veterans to join the cavalry, and how the men felt about their service. By extension, the teenagers learned

about the American Southwest during the Great Depression, the period of isolationism leading up to the war, and how the veterans responded to their return home after the war.

Third, the expedition was structured as a voluntary community-based activity for which the teenagers would receive no academic credit. This meant the expedition operated outside the community's school system. In some ways, this decision made the expedition more difficult. This decision removed the expedition from any hope of financial support from the local school system as well as a school district's liability coverage. Furthermore, it limited the leverage the expedition leader had on expedition participants since the leader did not grade the participants' performance. Finally, it removed the material support a school district could supply in the way of meeting space, access to computers, provision of supplies, transportation, and photocopier support. On the other hand, the expedition could operate outside of the school district's policies and rules. This meant the teenagers could handle unloaded weapons under the supervision of an expert at the Museum of the Pacific War or the Texas Military Forces Museum, ride in the expedition leader's van on every fieldtrip the expedition took, work at the expedition leader's house during every team meeting, and attend the regimental reunions which had open bars and wine with meals. It meant the teenagers could control their own actions, words, and dress in accordance with the laws of the State of Texas and the county they were in. Finally, it removed the expedition's participants from tests and concerns regarding progress under No Child Left Behind. In short, the teenagers were treated as adults and expected to act as such.

Much of what may have been lost by the decision to operate the expedition

outside of school was made up for by other arrangements. Before the expedition's participants were ever recruited, the expedition leader garnered the sponsorship of the University of North Texas Oral History Program and the Texas Military Forces Museum. These two organizations provided much of the material support which may have been lost when the decision was made to operate outside the aegis of a school district. In addition, the expedition's sponsors could contribute something most school districts could not. Each of the expedition's sponsoring institutions could offer the prestige of their name in the field of military history to the expedition. Their sponsorship could open doors and provide direct access to the authentic world of history and historians. What could not be supplied by the expedition's two sponsors was supplied by the expedition leader and his family. With regard to liability, he increased his automobile and homeowner's insurance liability coverage dramatically. With regard to meeting space, he provided a separate room in his house that could accommodate the teenagers and the expedition's equipment.

Given the structure of the expedition, scaffolding would be an important part of the process. In an initial scaffolding effort, the nearly 3,000 pages of primary source materials gathered by the expedition leader were arranged for the participants geographically according to time period. For example, those documents dealing with activities in Texas were arranged according to whether they took place during the Depression era (1929-1939), the period of unit activation (1940), or while the regiment was at Fort Bliss, Texas (1941), or Fort Clark, Texas (1941-1942). By arranging the research materials, participants would be met by a system of organization which was both chronological and geographic in nature. From the start, the teenagers would be

presented with a ready-made research database and at least two ways to organize their narrative history.

A second way the effort was scaffolded was to start the expedition with introductory activities which provided an overview of the 112th Cavalry throughout World War II. To that end, the first two documents the participants read were oral histories of 112th veterans who were in the regiment from November 1940 through 1945. Once the teenagers had completed those oral histories, they commented how much more familiar they were with the chronology and geography of the 112th's operations as well as common themes within the troopers' observations. Given that the expedition's teenage participants would be unfamiliar with much of the day-to-day life of a soldier in the Pacific Theater, field trips to museums and living history demonstrations provided yet another way to introduce the teenagers to artifacts from the war and demonstrations of their use. By the time the introductory activities had ended, three months into the expedition, participants commented that they had a much better understanding of how the Great Depression created circumstances which made volunteering for the National Guard a good option, how the National Guard and Regular Army differed from each other, what daily life was like in the cavalry, the characteristics of equipment and weapons used by the 112th Cavalry, how chaos could rule the battlefield, and the camaraderie which developed between the men. While quick to acquire expedition related historical content, the evidence suggests that the teenagers' journey with regard to acquisition of advanced skills within historical practice was more problematic.

A fourth scaffolding feature was mentoring by the expedition leader. While content knowledge acquisition was often simply a function of reading, listening, or watching during the expedition, skill acquisition depended on the mentoring function of the expedition leader as well as practice on the part of the teenage participant. Faced with an authentic historical objective, provided authentic historical resources, and treated as adults, the expedition's teenagers rapidly began to understand the scope of their task and felt overwhelmed. Initial interpretations by several of the teenagers provided evidence that they were unable to analyze materials from a historical perspective. Consequently, focusing on skill development, the expedition leader made both individual and group interventions. During one intervention, the teenagers were asked to analyze every piece of evidence the expedition had regarding the 112th's activities during one 12-hour period. The period covered the 112th's operations at Arawe, New Britain, from midnight, December 14, 1943, through noon, December 15, 1943. That period was chosen because the official histories of the armed services differed as to what occurred, and the expedition had a wide array of data from the U.S. Army, U.S. Navy, U.S. Army Air Corps, U.S. Marines, newspaper correspondents, magazines, and Japanese forces who were represented at that location during those 12 hours as well as the oral histories of a number of 112th veterans who were there. As a result of that intervention, advances were made with regard to the teenagers employing multiple types of sources, understanding different interpretations of the same evidence, identifying bias, searching for corroborating evidence, identifying and accounting for contradictions, and arranging evidence on a chronological basis. With regard to skill development, mentoring was a crucial part of the structural design of the expedition.

A fifth scaffolding feature of the expedition was its incorporation of a philosophy that, while the expedition's historical and learning objectives were inviolate, the expedition team could add further objectives, respond to additional needs, redefine the final product, and, to the extent the team agreed, bring their identities to bear on the expedition in other ways. More than anything, this feature provided the expedition flexibility regarding how it progressed in light of who volunteered to join the effort. While the expedition was committed to producing a narrative history of the 112th Cavalry, it was this feature which allowed participants to personalize their contributions to the effort. In this way, Juliet contributed a chapter on wounds and diseases, Sierra a chapter on medical organization in the 112th, Mike a chapter on weapons, and Victor a chapter on animals which served the 112th. It was this same feature which allowed Delta and Charlee to bring their highly developed social skills to the expedition's service during veterans' reunions, memorial services, and receptions. It was through this scaffolding feature that the expedition gave birth to the idea of creating a 112th Cavalry Day in Texas. In short, this feature allowed the teenagers to feel like the expedition was more of their own making and provided them the flexibility to work on topics within the history of the 112th Cavalry which interested them. The expedition was not the sole toy of the expedition leader; instead, it was a collaborative effort.

The fact the expedition was a collaborative research effort also served as a scaffolding feature by enabling peer teaching, organization according to interest and ability, and division of labor according to resources available. It also created a greater sense of equality as the expedition leader served as co-researcher with the teenagers and learned along with them. In one example of peer teaching, the teenagers instructed

the leader. As part of a lesson on how to search for material on the Web more efficiently, the expedition leader showed the teenagers how to search a lengthy Web page by copying the entire page to a word processing program and using the software's search function to locate the words of interest. Having completed the demonstration to the teenagers, the expedition leader asked for their comments. Juliet responded by asking why the leader did not just use the CONTROL-F function on the computer. The expedition leader admitted he was unaware of that function. Juliet then provided the leader and the rest of the teenagers a short class in the use of CONTROL-F when searching a Web page. Similarly, the expedition leader learned from the teenagers even when the subject was far afield from history. While attending a formal dinner with the teenagers, the expedition leader commented that he was always confused by which of the water glasses in front of him were his. Was it the glass to the left or the right? The expedition leader asked a similar question regarding his bread and butter plate. As other expedition members commented in agreement, Delta and Charlee burst out laughing. They commented that if we had attended a Texas cotillion in our youth we would have learned the trick to solving that problem forever. Victor and Mike said they had the same problem as the expedition leader and would love to learn a way to solve that problem. Extending her hands to her front, Delta bent her index fingers to touch the tip of each thumb in a circle. Aligning her index fingers with her middle fingers, her left hand formed a "b" and her right a "d." She commented that was the answer. The "b" on her left hand stood for bread ("b") and the "d" on the right for drink ("d"). Although the foregoing examples may seem minor, they provide evidence that collaborative learning was welcome in the expedition and that while the expedition leader could teach the

teenagers much about history, they could teach him much about topics other than history. In addition, they provided opportunities for each teenager to play to his or her strengths and take pride in the unique contributions they could make to the expedition. With regard to peer teaching between the teenagers, it soon became clear that the participants were well aware of each other's strengths and weaknesses. If a task involved writing, diseases, or wounds, the person the teenagers went to was Juliet. If it involved an explanation of weapons or tactics, the expert was Mike. Victor was the subject matter expert regarding animals, and Sierra was an expert in medical matters and how to organize an effort most effectively. Delta and Charlee were the mavens of all things social. If a dignitary needed to be contacted, they seemed to know how to do it and when to do it. If a memorial ceremony needed to be planned, they seemed to know what was involved. If a color guard was needed, Charlee and Delta could form one from the expedition's participants and train them in their duties. Although each of the expedition's participants was weak in some areas of knowledge and skills, by working collaboratively the expedition successfully responded to all requests made of it and successfully accomplished its objectives.

Finally, the structure of the expedition included learning through fieldwork, seminars, and individual research. This structure allowed for different modes of learning and catered to the different learning styles of the participants. Fieldwork often involved activities which were absent from seminar and individual learning and placed an emphasis on experiential learning. Seminar activities took the form of team meetings. The team meetings involved participants in a learning environment most closely resembling their high school experience. For those participants who were not self-



directed learners and found it hard to learn at home, or who lost focus in the multisensory experience of field trips, the team meetings provided a venue where the expedition leader acted as a teacher and the teenagers as students. The third method of learning was individual research. Individual research was, as the name implies, the research agenda developed by the individual according to the schedule, modes of learning, and objectives most apropos to that individual. While individual research might involve an individual's family or friends, it never involved another expedition member.

Fieldwork consisted of all of the field trips made by the expedition. These included field trips to the Museum of the Pacific War, Fredericksburg, Texas; the Texas Military Forces Museum, Austin, Texas; and the 112th Cavalry Association reunions in Dallas, Texas. Characteristics of the expedition's fieldwork were structure, social learning, multisensory experiences, extended periods of serious focus, and intermittent periods of frivolity. In all instances, fieldwork was planned weeks in advance of the activity. Parental permissions, schedules of departure and arrival, task assignments, and contact with the host organization were coordinated well in advance of the experience. While not all members of the expedition could be on every field experience, it was understood that the experience would be engaged in as a team. The experience would be shared by the expedition, discussed by expedition members, and a group consensus developed regarding the meaning of the experience. Field experiences were particularly valuable with regard to affecting participants both cognitively and affectively. Participants not only gained knowledge during field experiences, they often laughed, cried, became excited, or became lost in somber reflection as a result of what they had experienced by way of sight, touch, smell, taste, or hearing. Finally, field experiences

provided participants the opportunity to focus and be in the experience, or flow (Csikszentmihaly, 1990), for long periods. However, as a counterbalance, periods during which the expedition was off duty during transport or informal meals provided the teenagers an opportunity to just relax, have fun, and engage in frivolous behaviors.

Seminars in the form of team meetings provided a different form of learning experience. Half of the team meeting was generally spent with the expedition leader teaching a class, and half of the team meeting was spent listening to participants describe issues they were having in their research and providing mentoring to individuals who required it. A whiteboard in the expedition workroom provided a place for notes and illustrations; a globe and maps served for geographic orientation; computers were available for ready reference questions; and the expedition leader provided lectures on a wide variety of topics germane to the expedition's research objective. For the most part, the modes of learning in the team meetings were listening, watching, and active discussion. Team meetings were particularly important for social learners like Charlee and Delta. Less than enthusiastic about closeting themselves in the rooms at home and engaging in hours of individual research, Charlee and Delta admitted that they learned little at home. While they enjoyed going on the expedition's field trips, they often had problems understanding the significance of what they were experiencing in the field. For them, the team meetings were a perfect solution because there they could learn the content required and the expedition leader would explain its significance to the team.

Finally, participants learned in the same way historians have learned for many years, through individual research. By scanning necessary sources and placing them on

a compact disk (CD), the sources stored in the expedition's workroom could be sent home with the researcher. Including pertinent oral histories, each researcher had a CD tailored to their research needs with over 2,000 pages of primary source documents. It was the CDs which provided the backbone of research materials for individuals in the expedition. By reading and analyzing multiple sources regarding the same events, participants were able to develop narratives which became the chapters they handed in at the end of the project. It was through individual research that several participants honed their skills as practitioners of history. For those teenagers who were highly motivated, self-directed learners, the opportunity to conduct individual research according to their own schedule allowed them to function efficiently.

Evidence suggests that Juliet and Sierra had strong abilities to engage in individual research, and each produced work of the highest quality based on individual research. Each of them provided several draft versions of their chapters to the expedition leader and responded to his comments on their electronic submissions. Their work reflected a breadth and depth of knowledge which could only have been gained through reading a wide variety and a large number of sources. Significantly, their work exhibited research beyond the materials provided them and reflected the ability to develop research questions beyond those they were asked to answer. At the other end of the learning spectrum were Charlee and Delta, who could not seem to accomplish much unless they were at a team meeting. Unfortunately, team meetings were not designed to allow time for individuals to work on the workroom's computers. Consequently, Charlee and Delta accomplished little regarding their chapters at the team meetings and even less at home. Although they tried to explain their difficulties to

the expedition leader, his only response was to describe ways they could work more efficiently at home. For Charlee and Delta, the social learners in the group, individual research provided little opportunity to learn according to their personal learning styles.

*Organizational plan.* While the expedition's structure provided the overall master plan regarding the research effort, it was the organizational plan which determined who would do what, where it would be done, how it would be done, and why it had to be done. The organizational plan was the byproduct of an ongoing review by all the members of the expedition regarding how the expedition could best meet its commitments. While the expedition's functional objectives and structural components were set in concrete, the organizational aspects of the expedition were in a constant state of flux. If the expedition's function and structure defined the expedition's purpose and philosophy of operation, the expedition's organizational plan defined when, where, why, and how the expedition would operationalize its plans and who would be involved as well as in what capacity they would serve.

To begin, the organizational plan deconstructed the expedition's ultimate objectives into intermediate and initial objectives. Based on task analysis of the various objectives, the organizational plan (a) organized participants, (b) assigned tasks, (c) identified the relationship of participants to one another, and (d) developed a research and activity calendar. Informal in nature, the expedition's organizational plan evolved as a byproduct of expedition team meetings. During those meetings, participants discussed, given the expedition's resources, how best to accomplish near-term, intermediate, and long-term objectives. The whiteboard in the expedition's workroom contained a calendar, a list of commitments, and task assignments by individual. Those

whiteboard notes became the organizational plan. Written in erasable dry marker, the plan could change as necessary to accommodate changes in due dates, team member availability, and task assignment. Subsequent to each team meeting, an updated plan was e-mailed to each of the participants. Also, a week prior to a due date, expedition participants received reminders regarding their prior commitments to the expedition.

An important feature of the organizational plan was that it was a product of a consensus among expedition members. With few exceptions, tasks were never assigned by the expedition leader under the assumption that an individual was bound to participate. Instead, opportunities were brought to the team and discussed. In general, the team developed the task list associated with any potential commitment and then asked for volunteers to support the commitment. Once there was a critical mass of volunteers and the team felt comfortable they could meet the objectives required by the potential commitment, the team would commit to fulfill their objectives. If team members were interested in participating in an event but ambivalent regarding which tasks they were assigned, the expedition leader would assign tasks to individuals based on their abilities and interests.

*Operations.* While the expedition's mission provided a means to determine why a task was necessary, the expedition's structure a means to determine why a particular approach was followed, and the expedition's organization a means to determine when the task would be accomplished as well as who would accomplish it, it is the expedition's operations which led to results. Mission, structure, and organization were precursors to operations and provided the environment within which the operations took

place. It is the expedition's operations, however, which most closely illustrate how its participants engaged in the practice of history.

The expedition's operations could be analyzed strictly according to the cognitive tasks involved in creating a narrative history of the 112th Cavalry and acquiring knowledge of history as a discipline. Based on the reflections of its participants, however, to do so would be a disservice to the expedition. While conceived with the narrow academic intent of learning how teenagers engage with history out-of-school, the expedition's operations reflected activities and tasks far beyond that narrow academic focus. Instead, the expedition's operations reflected the participants' choice to engage not only in academic history through research, analysis, writing, and limited publication of a monograph, but to engage in public history as well. By submitting legislation, designing exhibits, delivering short lectures, and appearing in newspaper articles as well as on television, the expedition's participants interpreted what they had learned to the public and engaged as public historians. Similarly, the teenagers engaged with public historians. By watching living history reenactments, engaging with reenactors, touring museums, examining artifacts at museums, and watching documentaries, participants learned about the 112th Cavalry through venues designed and interpreted by public historians. Beyond the realm of academic history and public history, the teenagers proved themselves stewards of history by identifying repositories for materials which were donated to the expedition. At other times, the teenagers engaged in family history and genealogy as they provided copies of material recovered by the expedition to the families of individuals mentioned in the materials. Occupying territory in between that of an insider and outsider regarding the 112th Cavalry

Association, the teenagers engaged in much appreciated support activities for the veterans. Whether it was providing a color guard, moving tables, reading a prayer, or providing companionship and discussion at a dinner table, the teenagers learned about the 112th Cavalry by becoming, in effect, a youth auxiliary of that organization during the period the expedition operated.

Participants engaged in history by reading. All of the teenagers provided evidence they were able to learn about the 112th Cavalry through standard classroom activities such as reading, listening, and discussing. Individual research activities assigned as part of the expedition's task assignments placed a premium on reading. During the initial phases of the expedition, individual reading assignments were assigned to enhance a jigsaw (Aronson, Blaney, Sikes, & Snapp, 1978) learning strategy and became the foundation of the next team meeting's discussion. During the later phases of the expedition, research assignments were conducted individually, were not reviewed at team meetings, and were the basis for an individual's research contributions. Juliet and Sierra seemed to excel at learning from all manner of input. Self directed learners and avid readers, they accomplished their reading on time, provided evidence they had learned from their reading, and engaged the least in discussions regarding reading assignments. Charlee and Delta often completed only part of their reading assignments prior to team meetings and seemed to use seminar discussions as a way to learn information from the expedition leader and their peers. Often, after a group meeting, Delta and Charlee would submit work that had been due to be handed in at that meeting. As the expedition progressed and reading assignments were no longer discussed at the team meetings, Delta and Charlee no longer handed in

assignments. Victor and Mike took longer to complete their readings than Sierra and Juliet and, consequently, were only able to complete a narrower range of readings than Sierra and Juliet. Based on the evidence of their final chapter submissions, Sierra and Juliet each provided extensive coverage of their research topics, used a wide array of written evidence, and employed a good mix of primary and secondary sources. Victor and Mike's submission's were less extensive than Juliet and Sierra's, were based on a narrower variety of sources, but still employed a mixture of primary and secondary sources. Delta and Charlee's submissions were short in length, minimally addressed their topics, and were primarily based on their group discussions, conversations with veterans, and their observations during 112th Cavalry reunions and the living history demonstration. Participant's attributed these varied results to their ability to read and their ability to self-direct their own learning.

Participants engaged in history by analyzing evidence. Evidence collected during the early phases of the expedition revealed that the teenage participants initially engaged in superficial and non-critical analyses of the data reminiscent of novices (Wineburg, 1991). However, evidence collected later in the process, after several interventions, revealed that several participants were able to analyze data with a much greater degree of professionalism. Sierra and Victor repeatedly identified bias in sources, Mike and Juliet identified contradictory evidence and based upon context were able to offer possible explanations regarding how the contradictory evidence may have originated and how it entered the historical record. All of the participants displayed an improved ability to construct a chronological and geographical framework by which evidence could be assembled and analyzed. While many of the practices used by



historians were also employed by the teenagers, this is not to say that the teenagers employed them all of the time or were able to practice every tool of the professional historian. While Charlee and Delta were able, during interviews and discussions scaffolded by the leader, to identify corroborating and contradictory evidence, construct narratives based on multiple sources, identify bias, and provide the context for many of the 112th's activities, many of those abilities were not displayed in their written products. Mike's work suffered from the inconsistency he displayed in citing sources. Regarding the two final chapters he submitted, one was documented with citations, and the other was not. A particular skill none of the participants was able to display was a historian's ability to examine events within their macro-context. While the expedition's participants often explained events involving the 112th Cavalry by referring to their immediate or micro-context, it proved beyond their resources to explain the 112th's actions within the strategic context of the Southwest Pacific Theater during World War II.

Participants engaged in the practice of history by writing. While there existed a great disparity in the quality and volume of the participants' writing, evidence exists of the teenagers successfully writing summaries of their readings and reflections on their experience. To a greater or lesser degree, the teenagers engaged in learning how to write researched and documented interpretations of an event. While Juliet and Sierra were very successful in that regard, submitting multiple drafts and seeking feedback which led to well crafted essays regarding some part of the 112th's experiences, the other participants were less successful. Mike and Victor each submitted a draft document and sought feedback from the expedition leader. Their final essays were good but suffered from inconsistency. While Mike's essay regarding weapons was

sometimes pedantic, at other times it bordered on excellence. He described an infantry squad, drawing on an analogy from his music experience with brass ensembles, as an ensemble of death. He described how the structure of a music ensemble gave breadth and depth to each part of the ensemble's ability to address the audible spectrum.

Similarly, he described the structure of an infantry unit's weapon assignments as an ensemble meant to address the needs of the battlefield in terms of rate of fire, depth of coverage, and breadth of coverage. Unlike Juliet and Sierra who wrote consistently, Mike and Victor were more inconsistent in their handling of their research topics. While Delta and Charlee were consistently able to craft written responses which were mechanically flawless, their responses lacked depth and breadth of understanding. Out of all of the ways in which the teenagers engaged as historians, the one activity which discriminated the most between them, based on the evidence, was writing.

The teenagers engaged as historians by helping to craft and submit legislation regarding the expedition's research topic to the Texas Legislature. Arguably one of the least labor and time intensive tasks undertaken by the expedition, the draft legislation calling for creation of a 112th Cavalry Day in Texas on January 17, 2006, was the most widely recognized achievement of the expedition. Crafted from a template provided by another piece of legislation (Appendix N), expedition members simply made modifications which tailored the draft legislation to the 112th Cavalry. Submitting the legislation to the Texas Legislature through a local representative known to Charlee and Delta, the legislation soon took on a life of its own. Within a short period, the Texas House and Senate had adopted the concurrent resolution, and it had been signed by the governor. Approximately six months later, Texas observed 112th Cavalry Day.

As North Central Texas observed 112th Cavalry Day, the story of how it came about became a story in and of itself. The expedition's participants engaged as historians by explaining to newspaper reporters, radio station announcers, and television news broadcasters the story of the 112th Cavalry during World War II. By supplying a regional television network with photographs and movies of the 112th Cavalry during World War II, the teenagers were able to bring the exploits of the 112th Cavalry into hundreds of thousands of homes as the teenagers helped narrate a two minute tribute to the regiment aired on the evening of January 17, 2006. In addition, the expedition hosted a regional get together for 112th veterans and their families that day. The teenagers identified which materials should be displayed that day; how they should be displayed, and helped populate the display. Unfortunately, the event fell on a school day and the teenagers were unable to attend.

In November 2005, the teenagers engaged as historians by traveling to the state capital and attending a recognition ceremony in their honor at the Texas National Guard headquarters. Hosted by the state's most senior military officer, Adjutant General Major General Charles G. Rodriguez, the ceremony was also attended by Brigadier General Allen R. Dehnert, Assistant Adjutant General, and Commander, Texas Air National Guard. In addition, a number of other generals, colonels, and lieutenant colonels attended as did several 112th Cavalry veterans and their families. While the focus of the ceremony was the donation by the participants of a copy of their monograph to the State of Texas, it was also a time when the teenagers were recognized for their service to the state and to the community of military historians. While at the ceremony, each

participant spoke regarding the expedition and its impact on his or her understanding of the 112th's activities during World War II.

Participants engaged as historians by going to living history exhibitions and experiencing a mock military engagement offered by reenactors dressed in authentic uniforms, burdened with authentic equipment, firing authentic weapons, on a day which exhibited authentic tropical conditions. Afterward, Mike and Juliet watched the reenactors fieldstrip and clean their weapons and interviewed reenactors regarding their experiences with their weapons. The whole while, the expedition's participants took notes, tape recorded the event, and watched, heard, felt, smelled, and tasted the experience of an infantry assault on an enemy position in the Pacific Theater during World War II as interpreted by living historians.

Similarly, participants engaged as historians by touring museums and interacting with exhibits at the Museum of the Pacific War and the Texas Military Forces Museum. While at the Texas Military Forces Museum, participants engaged in archival research, examined several exhibits dedicated to the 112th Cavalry, and had the opportunity to handle a number of artifacts. During that same trip, Victor interviewed a 112th Cavalry veteran regarding horses in the cavalry. Mike conducted an inventory of all of the museum's photographs related to the 112th Cavalry.

Participants engaged as historians when they proactively provided families copies of materials participants had discovered during their research. An unwritten value shared by all of the participants was to not let a brave deed or kind act go unnoticed. For example, when participants came across Army orders bestowing significant awards on 112th servicemen, participants tried to locate that service

member's family and get those orders into the hands of the family. Similarly, when veterans had significantly kind things to say about an individual as they were being interviewed, expedition members would try and corroborate the sentiment among other members of the unit and then pass that information on to the respective families. An Associated Press (AP) correspondent who had accompanied A Troop on its ill-fated assault at Arawe had been recognized for bravery in the face of enemy fire by several interviewees. As members of the troop were returning fire during the ambush, the correspondent was observed saving wounded soldiers from drowning. Never recognized for his actions, the expedition located the sole-surviving member of his immediate family and passed the information on to her. While extremely grateful for the information, she made the expedition members promise not to bring any special attention to his name. The daughter said her dad was not the kind of man who sought out such recognition. In at least nine such cases, expedition members sought to ensure that families were aware of their 112th veteran's commendable activities during the war.

Finally, participants engaged as historians by cultivating their relationship with their informants. While never able to attain the status of an insider, participants chafed at their status as outsiders early on. In order gain the trust and respect of 112th Cavalry Association members, participants became occupants of the land between that of a 112th Cavalry Association insider and outsider by becoming a de facto youth auxiliary of that association. By placing their youthful abilities at the service of the 112th Cavalry Association during reunions, the expedition's participants were able to change their position with regard to the elderly veterans. Whether it was providing a color guard, moving tables, reading a prayer, or providing companionship and discussion at a dinner

table, the expedition's participants became a source of assistance to the veterans. In return, the veterans became a source of assistance to the expedition whenever possible.

How the teenagers engaged in the practice of history was determined by the expedition's mission, structure, organizational plan, and its operations. While none of the teenagers was individually able to practice history at the level of a professional in all areas of knowledge and skill, individually the teenagers were able to practice as novice historians and, in some instances, beyond the level of a novice. Pooling their talents and working collaboratively, however, raised the quality of their collected products. By the end of the expedition, its outcomes had far exceeded those that could have been achieved by its leader or any member individually. Taken in total, the efforts and products of the expedition were recognized by elected officials, senior officers in the military, military historians, the veterans, and the public, as having been professional in their approach, professional in their undertaking, and, in most instances, professional in their results. As one senior officer, himself a veteran of modern armored cavalry operations in Iraq during Operation Desert Storm in 1991 observed, "I am inalterably convinced that engaging teenagers as historians is a superb concept. These incredibly bright, motivated, and insightful young adults have done a masterful job of capturing the essence of the troopers who served with such distinction in the 112<sup>th</sup> Cavalry Regiment."

*In What Ways Does an Out-of-School History Expedition Lead to Outcomes Similar to Those the NEA (1893) Associated with the Intensive Study of Learning?*

The subcommittee which provided recommendations to the NEA's Committee of 10 regarding history education, the Madison subcommittee, included in its recommendations that high school seniors be offered a course in the intensive study of history (NEA, 1893). The intensive study of history was to be a simplified, age-appropriate version of the collegiate history seminary popular at the time. The Madison subcommittee asserted that the intensive study of history would allow teenagers the opportunity to (a) engage in collaborative inquiry in history, (b) learn about the discipline of history, (c) learn skills that could help them individually and could be applied to help society, and (d) see how history was done at the collegiate level. Evidence suggests that the history expedition researching the 112th Cavalry in World War II met each of the learning goals asserted by the subcommittee. Absent the Madison subcommittee's assumptions that the intensive study of history would be part of a high school's official curriculum, taught by a high school teacher, and take place during the school day, the 112th Cavalry history expedition was an example of the intensive study of learning which took place in an out-of-school community setting.

Structurally, the history expedition depended on collaborative history learning for its success. The very structure of the history expedition as a group effort, in pursuit of a common goal, requiring historical research, ensured that it would take the form of a collaborative inquiry in history. That the research was broken down into mutually exclusive yet mutually supporting topics ensured that the final product would be a collaborative construction. The research effort, however, was but one of several activities undertaken by the expedition. In addition to research, expedition members engaged in activities as color guard members, memorial delegates, event organizers,

public speakers, weapon cleaners, and civic champions of state legislation. The array of activities with which expedition members engaged allowed each participant to contribute their unique skill set to successfully accomplishing each mission assigned the expedition. Were it not for the collaborative efforts of the expedition's participants outside the research process, the expedition would not have succeeded in all that it did. No single participant had all of the knowledge, skills, and abilities necessary for success in every area, so, by default, the expedition became a group effort. Consequently, the strength of the expedition format became clear when its members collaborated in both research and non-research activities.

The Madison subcommittee asserted that the intensive study of history would allow students to learn about the discipline of history. The 112th Cavalry history expedition allowed participants to participate peripherally within the community of practice of history. As such, the history expedition provided multiple opportunities for participants to learn not only history, but about the discipline of history. Participants worked directly with the raw materials of the historical profession which are known as primary and secondary sources. Those unexpurgated sources included manuscripts, books, journal articles, military records, photographs, artwork, oral histories, interviews, and artifacts, to name but a few. Participants exhibited their historical skills as they provided sourcing information, corroborated evidence, explained contradictions, developed narratives, wrote, spoke publicly, and published. Participants displayed values they shared with the discipline of history as they attempted to maximize objectivity by identifying bias and subjectivities in their work; conserved and protected materials they accessed at research locations; discussed alternative interpretations in



their writing; published their findings for review within the community; and exhibited stewardship with regard to history. The expedition introduced its participants to the infrastructure of the discipline as they visited museums, research libraries, and archives. They learned about different professions within the discipline as they met and spoke with curators, archivists, museum technicians, interpretive specialists, and academic historians. The teenage participants learned about the differences and similarities between professional and amateur historians as they worked with amateurs in the form of reenactors, volunteer docents, and 112th veterans who had spent much of their lives asking questions about and researching the events they had lived through. Participants finished the expedition with a greater understanding of the discipline of history than when they started.

Among the Madison subcommittee's assertions was the statement that the intensive study of history would allow participants to learn skills that could help them individually and that could be applied to help society. The 112th Cavalry history expedition provided opportunities for its participants to learn and practice skills which helped them individually during the expedition as well as skills they applied to help society as part of the expedition's outcomes. As part of their activities with the expedition, participants practiced skills that could help them in every walk of life. They were asked to be self-directed learners, to isolate the facts of an event, to account for contradictions, to identify bias and subjectivity, to allow for multiple interpretations of the same evidence, and to resolve disagreements in an account based on the best evidence. In doing so, they practiced their reading, writing, and public speaking skills. While engaged in the expedition, they learned how to put those skills to use in service to

society. Their draft legislation, submitted to the Texas Legislature, was enacted by the State of Texas and served to honor a group of hitherto largely unrecognized senior citizens, the veterans of the 112th Cavalry. Their narrative history of the 112th Cavalry revised previous interpretations of the 112th's experiences during World War II and was donated to the State of Texas. Through legislation and publication, the teenage members of the expedition showed their ability to apply what they had learned to help society.

Finally, the Madison subcommittee argued that the intensive study of history would allow students to see how history is done at the collegiate level. The strongest argument in support of the expedition having achieved this goal lies in the fact that the very model from which the history expedition concept was drawn was the college history seminar (Webb, 1955). According to the testimony of the teenage participants in the expedition as well as award winning teachers who read the final product and observed the project, the 112th Cavalry history expedition was unlike anything they had experienced in high school. The expedition's commitment to collaborative learning, authentic tasks, authentic assessment, and original research marked it as something different from the standard high school curriculum. While it is not argued that the activities engaged in by the history expedition can only be found in colleges and universities, it is argued that colleges and universities are the places such activities are most commonly found. Like the expedition, it is at colleges and universities that we find examples of collaborative research efforts undertaken by teams of individuals in pursuit of common research objectives who labor without pay in adherence to the understood methods and values of the discipline of history. Even then, such activities are most

commonly undertaken in upperclass undergraduate and graduate courses. Having participated in the history expedition, the teenagers had gained a better idea of what college level history is than they had before they joined the expedition.

*What is the Relationship Between the Lived Experience of a Community-Based History Expedition and Lave and Wenger's (1991) Theory of Peripheral Participation within a Community of Practice?*

Evidence gathered during this study suggests that the history expedition which studied the 112th Cavalry was an example of situated learning as postulated by Lave and Wenger (1991). The expedition was an example of free choice learning which engaged teenagers as peripheral participants within the community of practice of history. It satisfied Lave and Wenger's observations that situated learning provides participants: (a) an authentic task, (b) access to authentic materials, (c) access to an authentic work environment, (d) access to mentors from the community of practice, and (e) authentic assessment congruent with that provided full practitioners within the community. Evidence gathered during this study also supports Wenger's (1998a, 1998b, 2004) contention that peripheral participation within a community of practice operates as an informal curriculum of identity.

The task undertaken by the expedition, to write a narrative history of the 112th Cavalry during World War II, was an authentic task. The expedition's teenage participants were offered the same resources available to professional historians. Material resources in the form of military records, first hand accounts, official histories, photographs, movies, maps, and secondary sources were made available to the participants. The expedition traveled to museums, archives, and research libraries in

search of further information. The expedition leader retrieved records from the National Archives, the U.S. Army, and the U.S. Navy. The expedition contacted missionaries in New Britain who questioned local natives regarding the project, former coastwatchers who had worked in New Britain, and former crew members of the Royal Australian Air Force who had flown in support of the 112th RCT in New Guinea and the Philippines. As they spoke with amateur historians, professional historians, academic historians, and public historians, the teenage participants received guidance from practitioners across the spectrum of experience within the community of practice. Public historians welcomed the teenagers and provided mentoring as the teenagers practiced history within museums, archives, research libraries, and armories. As might be expected by a professional historian, every door upon which the expedition knocked was opened, every help extended, and every request respectfully fulfilled. In virtually every way, the expedition's teenage participants were welcomed into the community of practice of history as peripheral participants.

As an example of situated learning, evidence gathered during the study suggests that knowledge is distributed through groups and that group performance can exceed individual performance (Pea, 1990; Barab & Plucker, 2002). Whereas no single member of the expedition had the skills and experience necessary to be a professional historian, as a group the participants transcended their individual abilities and produced outcomes in excess of those expected of their relatively immature and inexperienced positions. Whereas no teenage participant was familiar with the narrative story of the 112th Cavalry during all of World War II, between them they produced a satisfactory narrative history of the regiment during that time period. While no participant in the expedition

possessed all of the social, academic, and vocational skills necessary to set a formal dinner setting, organize a color guard, offer a prayer, draft legislation, write a monograph, address a room full of dignitaries, interpret a piece of art, differentiate a 1903 Springfield from a Garand M1 rifle, or use a finding aid, to name but a few of the skills called upon during the expedition, as a group the participants displayed that knowledge.

Supporting Wenger's (1998a, 1998b, 2004) contention that peripheral participation within a community of practice can operate as an informal curriculum of identity, evidence collected during this study illustrates that the participation by the teenagers in the expedition affected their identity. As outward manifestations of their commitment to the project, early on, the teenagers began to wear their 112th Cavalry baseball caps when engaged in expedition work. They spoke repeatedly of how their interviews and conversations with 112th veterans provided a new lens through which they could view their own lives. As they read about the experiences of the 112th veterans when they were teenagers themselves, my co-researchers reflected on their own lives and questioned what their own performance would like under similar circumstances. In their college applications, the expedition's teenage participants wrote about their expedition experience and how it had affected their lives. In a near perfect substantiation of Wenger's (2004) comments regarding legitimate peripheral participation within a community of practice as a curriculum of identity, one expedition participant observed:

The unveiling of my interest in right-brained subjects began with a simple invitation from an oral historian and continued in stages. The first step was the reunion and the constant thanks we received from the men and their families for preserving their little-known accomplishments. Then, there was another step on

Memorial Day when the group traveled down to the Pacific War Museum in Fredericksburg and donated a flowered wreath in recollection of the outfit. The layers continued to build toward an incomparable experience linking me to a few of the men responsible for this nation's protection and well-being. Ultimately, I, a teenage girl, spent my high school career building my mathematics and science talents, only to discover that I became a more well rounded person when I was not only a left-brained science geek, but also a right-brained historian (Sierra, speech at presentation ceremony, November 29, 2005).

That the expedition operated as a curriculum of identity was confirmed by Wenger himself when after reading a description of the expedition as well as several media reports he wrote, "Yes, this type of experience falls exactly in the realm of what I had in mind when I talked about learning as a journey of the self" (E. Wenger, personal communication, February 24, 2006).

The assessment of progress by a legitimate peripheral participant within a community of practice, according to Lave and Wenger (1991), is through an examination of that participant's trajectory within the community of practice. In the apprenticeship examples Lave and Wenger provide, those of West African tailors, shipboard navigators, meat cutters, midwives, and alcoholics, there is a clear progression of practice for participants. Within the field of academic history, that is also the case. One's position within the community can be seen by one's trajectory with regard to level of training (e.g. BA, MA, or Ph.D. in history), employment status (associate, assistant or full professor), publication history, and one's level of involvement within professional organizations of the community of practice. History, however, is a much wider field than simply academic history. History as a community includes the neighborhoods of academic history, public history, and amateur history to name but a few. Trajectories within public history and amateur history are more difficult to define since they often involve less formally defined, and in some cases undefined,

paths of progression. Since the expedition lasted but a year, was populated by participants without history degrees, took place outside any recognized history program, provided no opportunities for advancement within the expedition, and involved no assessment other than creation of a final product, there is no easy method by which to track a participant's trajectory. Consequently, an individual's trajectory within the expedition is described within this study as the progress he or she made toward constructing a final product which reflects mastery of content knowledge as well as use of tools, application of skills, and commitment to values shared by the community of practice of history.

While the history expedition provided an excellent vehicle through which participants received the opportunity to practice as historians, as structured in this case, it did not ensure that each participant would avail him or herself of that opportunity. While providing the opportunity for teenagers to learn about the 112th Cavalry, the Pacific Theater in World War II, and the practice of historians, participation in the expedition did not guarantee that participants would learn about those subjects. Among the six teenage participants, three distinct modes of participation seemed to lead to three distinct trajectories of accomplishment. I categorized those trajectories as: (a) global learner, (b) targeted learner, and (c) social participant. Global learners had developed the ability to learn from all types of source material, intellectually respond to all aspects of the 112th Cavalry's experience, and take their research beyond the simple retelling of a story. Global learners used many of a historian's tools and displayed many of a historian's skills as they produced authentic historical products. Targeted learners focused on topics of immediate personal interest as opposed to the

big picture of the 112th's experiences in World War II. They exhibited less of an ability to engage with all of the types of sources; they displayed fewer historical skills, and they created products which were not as rich in detail and breadth as those of global learners. Social participants had little interest in pursuing a research agenda, but were, instead, committed to the social aspects of the expedition.

Global learners were those participants who seemed interested in every aspect of the 112th Cavalry's story. Although pursuing research topics which held deep personal interest for them, global learners were open to exploring other aspects of the 112th Cavalry's experience as well. In addition, they posed questions of the material which extended their research interests beyond the materials on hand. Sierra and Juliet's responses to reading oral histories, the war diary, and other primary sources support a contention that they were global learners. Although Sierra was personally interested in the medical aspects of the 112th Cavalry's experience, she also found virtually everything else she read about the 112th interesting. Sierra reported few things as being boring, displayed a desire to gain a better understanding of what she had read, and posed questions concerning the experiences of minorities during the World War II which extended beyond the materials available to the expedition. Although Juliet was also personally interested in the medical aspects of the 112th's experiences, she proved herself capable of learning about, mastering, and writing about topics as divergent as equipment used by the regiment and its last months of combat in Leyte and Luzon in the Philippines. Sierra and Juliet also had the ability to analyze, evaluate, and learn from each of the types of evidence presented during the course of the expedition. For them, documents, maps, artwork, photographs, artifacts, one-on-one interviews, and



demonstrations were equally accessible with regard to their learning. Consequently, when Sierra and Juliet wrote their chapters of the final report, they each displayed a firm grasp of the material and they produced narratives based on and illustrated by multiple types of evidence.

Targeted learners came to the expedition with a personal research agenda and stuck to that agenda throughout the life of the expedition. Mike came to the project interested in weapons and battles, while Victor came with an interest in animals and veterinary science. For both Mike and Victor, material which diverged from their personal research agendas was at best extraneous and at worst boring. Since neither Victor nor Mike enjoyed reading, each of them developed and relied on a few trusted sources early on in their work. Because of the reading skills needed to pore through the oral histories, Mike and Victor often used secondary sources and evidence from the first two oral histories the teenagers read, the Kelley and Fortenberry oral histories, to the exclusion of other, often richer, sources. Since they worked to a personal research agenda nested within the expedition's overall research agenda, they conducted their research primarily to answer their own questions. Consequently, their chapters reflected a personal journey of education regarding their research topics more than they did a balanced historical essay. Whether their commitment to a narrow range of research was driven by personal interest, a limited ability to read all of the resources available, or a combination of the two is a question unanswered by this study.

Social participants came to the expedition interested in participating with their friends, providing service to the community, and doing something different. They did not come to the expedition to flex their academic muscles, pursue a particular line of

research, or become a subject matter expert in the 112th Cavalry during World War II. Based on the quality and style of their participation, Delta and Charlee were examples of social participants in the expedition. Consequently, they displayed the least interest in the subject matter, they had the most trouble in producing a final product, and the knowledge they could display about the 112th by the end of the expedition was based solely on conversations, interviews, and team meeting discussions they participated in as part of the expedition. They were, however, dependable in their attendance at all of the expedition's meetings and events; they represented the expedition very well in public, and their mood of learning, talking with others, provided a high level of participation in all of the expedition's discussions. Perennially cheerful, the social participants rapidly became the public faces of the expedition and ensured that each time the team did something, there was a critical mass of expedition participants. In short, while the final report suffered from the social participants' inability to master their topics, the expedition, overall, was genuinely blessed by their social talents.

#### *Other Conclusions*

Based on my observations and comments offered by the history expedition's participants, the extent to which the expedition was successful depended in large part on the: (a) situated nature of the expedition, (b) experience and abilities of the expedition leader, (c) motivational characteristics of the research topic, (d) abilities of the participants, and (e) support from within the community of practice of history.

The expedition was structured as a situated learning environment according to the description of situated learning provided by Lave and Wenger (1991). In that description, Lave and Wenger advocate that the situated learning environment should

be modeled as authentically as possible with regard to the operational environment of the community of practice of interest. That the expedition was successful in that regard was commented on by all of the expedition's participants. In their personal interviews and reflective messages, each of them commented on the fact that the expedition was unlike anything they had ever experienced. They commented that they enjoyed the realism of the expedition's objectives which removed the need for tests, quizzes, and classroom work. According to participants, the objective-oriented expedition's commitment to authenticity was a particularly important feature since it provided a reason for their efforts and the opportunity to construct an original understanding of history that could be argued on its merits. To the teenage participants, it was a relief to be engaged in the practice of history where there was an actual mission which could result in meaningful change as opposed to a curricular objective of passing a state examination.

The background of the expedition leader was an important part of the expedition's success. Having worked with teenagers for a number of years in the Army and as a high school teacher, the expedition leader was at ease with teenagers and knew how to appeal to them at different levels. He knew from his experience that most teenagers responded well to challenges which were seemingly audacious in nature. He had also learned from his experience that while teenagers can be recruited to accept an audacious challenge, their interest soon flags when they experience failure, when too much is expected of them in too short a time, when they are given responsibility and saddled with accountability yet wield no authority, and when they find themselves in a position which involves no sense of gain or enjoyment. Consequently, the expedition

leader structured the expedition in response to his experiences. For example, as a way to ensure success, the leader structured the expedition with one major historical goal, to construct a narrative history of the 112th Cavalry and present it to the State of Texas. The specific format of the final product, the exact timing of its delivery, and how and to whom it would be presented were left intentionally undefined. This intentional vagueness allowed the teenagers a high probability of accomplishing the mission to some degree regardless of their abilities. Similarly, the scaffolding put in place by the expedition leader was meant as a way to speed the effort, distribute individuals' skills across the effort, minimize individuals' weaknesses, and provide a solid foundation of data from which members could construct their understandings. Field trips were designed as fun, educational, and inspirational experiences with the emphasis on fun, but fun with an ever-present concern for the safety and well being of the teenagers. Field trips were to be looked forward to and were to serve as a motivator during those times hard work was expected from the teenagers. While the list could go on, the experience and abilities of the expedition leader gained from years experience with teenagers and their parents was a material aid to the success of the expedition.

The motivational characteristics of the research topic were addressed when participants commented on how much they loved reading the men's oral histories, the extent they interacted with the veterans at reunions, the e-mails and letters the expedition received which thanked the teenagers for their continuing efforts on behalf of the 112th Cavalry, and how each of them felt he or she finally knew more than almost anybody about a topic of historical significance. The teenagers felt good about

themselves, about what they accomplished, and about the recognition each of them received as part of the experience.

The expedition's successful outcomes were affected by the abilities of the expedition's participants. On a surface level, there was little diversity within the expedition's participants. Each of the teenagers was a high-ability, literate, Caucasian student with an excellent command of the English language, ten years successful experience with public school social studies courses, and a GPA of 3.5 or higher. All were actively engaged as high school musicians and had volunteered for, and been successful with, the grueling training and demands of Texas high school marching band. However, across the period the project operated, the individuality of each participant became clear and had an effect on the project in some way. The project involved students who loved to read and students who disliked reading, students who were shy and experts at intrapersonal intelligence while others were gregarious and experts at interpersonal intelligence (Gardner, 1983). The ability of the participants to develop narrative structures were vastly different as were their individual abilities to engage in higher order thinking in history. Finally, each approached the History Without Borders (HWB) project with a differing set of expectations and, hence, followed different trajectories within the project. While diverse in academic abilities (the expedition recruited a future salutatorian, a future minority scholar, as well as a participant who was in the 32nd percentile of his class), as a group the teenagers were homogenous with regard to their commitment to the project, their willingness to engage in hard work, and their desire to accomplish the mission. Given a very different group of volunteers, the expedition's outcomes might have been very different.

Finally, much of the expedition's success stemmed from the support it received from within the community of practice of history. Time after time, professionals had the ability to leave their door closed to the expedition when it sought entrance. Instead, a tremendous outpouring of support and a readiness to help the cause were the defining characteristics of the institutions and professionals with whom the expedition engaged. Repeatedly, the expedition was allowed access to sources commonly protected from public access. This was exhibited when the Museum of the Pacific War allowed Mike and Juliet access to the reenactors behind the scenes as well as their weapons. Similarly, that level of support was displayed when the Texas Military Forces Museum allowed Victor access to tack and other authentic leather gear the 112th Cavalry had used during World War II. The National Archives, Navy Historical Center, and the University of North Texas Oral History Program were equally supportive when it came to special requests from the expedition. In short, having every reason to do the contrary, the community of practice of history, instead, welcomed these particular peripheral participants of history into their institutions. Without their help, the expedition's outcomes may have, once again, been very different.

### Implications

Evidence provided by the History Without Borders Project lends support to the following implications. Under certain circumstances, community-based, out-of-school history expeditions can provide an opportunity for participants to engage in the practice of history, construct original interpretations of history, and provide a highly visible service to the community. In addition, history expeditions make use of the tremendous investment which has been made in America's museums, archives, and public history

programs. Possible outcomes from this research could include development of a network of institutions of informal learning in history to provide educative experiences exclusive from those of the public schools. This would resemble a “deschooled” (Frierie, 1970; Illich, 1970) approach to history education. A second possible outcome could be the development of educational initiatives in which schools and other cultural institutions shared responsibility, accountability, and resources for history education. Such a “distributed-school” approach would build on the strengths of each partner from the formal and informal education arena. A possible third outcome would be the integration of specific aspects of the history expedition into the public schools without the aid of other community institutions. Such an approach would closely resemble what is in place now in society and could, therefore, be called a “traditional school” approach.

The “deschooled” approach would closely resemble the HWB project. It would take place out-of-school, use no school resources, have no accountability with regard to state assessments, and would depend on the resources of the community other than the public schools. As illustrated in this intrinsic case study, such an approach could lead to great success for a very limited number of people.

The “shared-school” approach acknowledges Martin’s (1996) argument that the cultural wealth of America is too widespread, too complex, and too important to be left solely to the overworked employees of the schools. Instead, the vast resources of the community of history would be mobilized to aid the schools in the task of interpreting America’s cultural resources. A more synergistic approach than “deschooling,” the “shared-school” approach would see public schools and other community institutions joining hands to tackle the problem of history education. How such an approach might

work can be illustrated by using the process of a history expedition as an example. Based on a spiral curriculum, the history expedition consists of: (a) a foundational phase, (b) an analytical phase, (c) a product development phase, and (d) a publication phase. Partners in the “shared-school” approach would focus their efforts on the phase each was best able to support. Within such a scenario, the idea would not be to “deschool” by ripping the educative function from a state agency and returning it to the people. Instead, the schools, acknowledged masters of content knowledge and behaviorally based pedagogy, could prepare students to practice, while the museums, libraries, and historical societies could provide culturally rich environments in which students could practice their skills in experience-based situated learning environments.

In such a partnership, each institution would commit to doing what it is best equipped to do. Public schools would rely on their traditional, behaviorism-oriented history classrooms to deliver foundational content knowledge in highly structured, scaffolded, learning environments. Problems presented the students would be well formed, unambiguous, and otherwise “tidy.” Achieving success in the tidy world of the classroom would set the stage for progressively “messy” problems encountered by students in community-based situated learning environments such as museums, libraries, and historical societies. Those history-oriented community institutions would provide access to their collections, their trained staff, and a situated learning environment apropos to social constructivist activities in inquiry. Using the resources of community institutions, students would be challenged by ill-formed problems, ambiguous and contradictory evidence, as well as decreasing levels of scaffolding and structure. In such a spiral curriculum, schools could focus on developing knowledge



required for lower order thinking while other organizations could focus on developing the ability of students to engage in higher-order thinking during the analytical phase as they engaged in out-of-school history expeditions. Simply put, the public schools would provide the ideal location for learning the stuff of history while the community external to the schoolhouse would provide the ideal location for practicing history. Responsibility for supporting the final two phases of the expedition process, product development and publication, would be negotiated between the partners based on the resources each brought to the table.

A third outcome of this research could be the introduction of aspects of the history expedition process into the classroom in a “traditional school” approach. The messy historical problems encountered by the HWB participants caused them to grow beyond their experience from school. They observed that the ways they worked with history in school caused them to interact with prepackaged simulations or highly structured document-based questions. For example, they reported they had never had to face contradictory sources, gaps in the historical record, or misinformed informants as they worked with primary sources. They had never worked with secondary sources which were incorrect and they had never worked with complete oral histories as sources. Such messy, but very real, circumstances place a premium on higher order thinking skills and aid in their development. A possible outcome of the HWB project could be a renewed interest on the part of the public schools to introduce such messy problems as a way to develop higher order thinking by history students. In the same way, I introduced an intervention in April 2005 to help develop the HWB participants’ skills in historical analysis, teachers could construct similar exercises using messy, ill-

formed problems as the basis for analysis in the classroom. Similarly, teachers could use oral histories from a local program as sources in the classroom to provide background material for students. Then, students could be introduced to real-life informants in the classroom and gather information as part of an interview process. Suffice it to say, the HWB project provides a variety of activities which can be imported into a traditional classroom, however, their specific location within the spiral curriculum is an important consideration in their use.

Because this case study provides evidence that the intensive study of history can provide teenage participants a deep understanding of a narrow research area, improve their understanding of the discipline of history, provide a taste of what it is like in college level history, and provide participants skills which may be of value to them as well as the community, the NEA's (1893) long forgotten recommendation regarding the intensive study of history may gain new life as a possible course for high school seniors. In an era when alternatives to traditional methods of history instruction are being explored for a variety of reasons, the intensive study of history approach as enacted in the History Without Borders Project provides an alternative approach to learning history which was generally successful.

Finally, based on evidence gathered during this study from professionals within the community of practice of history, this case study provides evidence that teenagers engaged as historians are capable of cooperatively attaining significant results when provided authentic objectives, authentic resources, realistic deadlines, and the inputs of mentors in a structured environment. Given the reviews provided by professionals of the products of the History Without Borders history expedition, it may no longer be possible

to patently say that teenagers are incapable of performing significant research in history (American Historical Association, 1915). Instead, the question may have changed to under what conditions which teenagers can produce results of what significance.

#### Recommendations for Future Research

While this intrinsic case study provided specific observations regarding one very unique instance of a phenomenon, further research is required to validate that similar efforts operating under similar conditions can produce similar results. Alternatively, further research is needed to investigate how changes in participant diversity, research topic, leadership, community sponsorship, mission, or structure affect the outcomes of a history expedition. Finally, once a critical mass of qualitative research data has been collected and an evidence-based theory of expeditionary history learning advanced, quantitative methods can be applied to test that theory and further advance the field of informal history learning with regard to outcomes as a function of age and method by which an individual engages with history.

APPENDIX A  
PROJECT RECRUITMENT LETTER

An Invitation to History Without Borders:  
a [university name deleted] Research Project

The opportunity:

Up to eight [high school name deleted] high school students are needed who are willing to participate in a year long history project in support of a [university name deleted] research initiative. The research initiative of the College of [deleted] is based on the assumption that in order to understand history you need to “do” history; that the requirements of performing original historical research make the classroom a poor place to conduct that research; and that interdisciplinary cooperative research bears a close relationship to ensemble performances.

You will study the 112<sup>th</sup> Cavalry, Texas National Guard, the last horse mounted cavalry unit deployed overseas for duty in World War II. In combat for 434 days, the men of the 112<sup>th</sup> earned 2 Medals of Honor, 2 Distinguished Service Crosses, 1 Distinguished Service Medal, 3 Legions of Merit, 56 Silver Stars, 111 Bronze Stars, and over 1,200 Purple Hearts. They were pioneers of amphibious combat, employed a variety of technologies for the first time in the Southwest Pacific, and were the first to be involved in helicopter medical evacuations in the Pacific Theater. You will interview surviving WWII veterans of the 112<sup>th</sup>; perform original research using both primary and secondary sources; travel to a variety of archives and museums; and produce the first history of the 112<sup>th</sup> Cavalry in World War II. That history will be presented to the 112<sup>th</sup> Cavalry Veterans Association, the Texas Military Forces Museum, and the Commander-in-Chief of the Texas National Guard during the summer of 2005. All research activities are extracurricular and will take place outside of school. No school credit will be assigned for this service project.

Your commitment:

The effort will begin in August and end approximately one year later. Activities will amount to approximately four hours of group work per week during the Fall semester. During the Spring semester the hours will double to approximately eight hours per week of group activities. The first two weeks of June, 2005, will require approximately thirty hours of work per week. The project schedule tentatively shows the final product being delivered in Austin on June 14, 2005.

Our Commitment:

1. It is anticipated that you will receive community service credit for each hour of work performed in support of this project. Based on current plans this will amount to hours in excess of 250 for the year.
2. We are committed to an organizational structure that maximizes leadership opportunities for participants.
3. You will receive credit as a co-author for the publication of the final history of the 112<sup>th</sup> Cavalry and any other associated publications.
4. You will participate in the most challenging, fun activity you have ever done in your life!

5. You will receive priceless experience in research skills, writing, and public speaking.
6. You will experience the feeling of being the world's foremost expert in a particular subject and providing your expertise as a public service.
7. You will provide the veteran's of the 112<sup>th</sup> Cavalry; their families; the current members of the 112<sup>th</sup> Armor Battalion, Texas National Guard; and the State of Texas with a product that provides meaning to the sacrifices of the 112<sup>th</sup> both during and after World War II.

The Leader:

The principal investigator, Glenn Johnston, will also be the project director. A [community name deleted] parent and a PhD student in the College of [school name deleted], Glenn is an award winning high school teacher from New York. Glenn specializes in extracurricular group research projects in history. Having earned a BA from St. Lawrence University in Interdisciplinary Studies (1978), an MA in Geographic Information Systems from SUNY-Buffalo (1987), and an MS in Secondary Social Studies from Niagara University (1993), Glenn is a practicing member of the communities of history, social studies, and geography. As a former officer of the 2<sup>nd</sup> Armored Cavalry he is also at home within the military environment.

How to become involved:

Take this home and discuss it with your parents. If you would like to pursue this opportunity further, there will be an organizational meeting in August at a time that will not conflict with marching band commitments. At that time, the specific details of the effort will be reviewed, consent forms distributed, contact information exchanged, and questions answered.

If you are interested, please fill out the sheet below, sign, detach and send to:

Glenn T. Johnston  
 [Address and phone number deleted]

I am interested in learning more about this research opportunity. Please contact me at the following address:

Name:  
 Address:  
 Phone:  
 Grade:  
 Extracurricular interests:  
 Favorite School Subject:

Student Signature	Date	Parent/Guardian Signature	Date
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APPENDIX B  
PARTICIPANT/ PARENTAL CONSENT FORM

University of North Texas  
Institutional Review Board  
Research Consent Form

Subject Name

Date

Title of Study History Without Borders

Principal Investigator Glenn Johnston

Co-Investigator(s) [Name deleted]

Before agreeing to participate in this research study, it is important that you read and understand the following explanation of the proposed procedures. It describes the procedures, benefits, risks, and discomforts of the study. It also describes the alternative treatments that are available to you and your right to withdraw from the study at any time. It is important for you to understand that no guarantees or assurances can be made as to the results of the study.

Start Date of Study

09/01/2004

End Date of Study

12/01/2006

Purpose of the Study

This study will examine the foundational theory, definition, design, implementation, and results of a new method of informal learning in history called History Without Borders.

Description of the Study

This study will involve a small number of students ( $n < 10$ ) in a long-term study (18 month) of the "history without borders" concept. Based on the theory of situated learning and community-based education, this new method will involve the participants in a complex investigation of the history of a Texas military unit in World War II. Over the course of one year the participants will perform secondary and primary research, analyze existing oral histories and conduct new oral history interviews of unit veterans, define a final product, plan and develop that product, and deliver the product to authorities within the field for evaluation. The project team will perform their work as part of the extracurriculum, using informal methods of instruction supported by community institutions and local citizens. The senior member of the project team will be the Principal Investigator acting as a participant observer. The project will not be affiliated with a particular school district. Instead, it will be supported by the University of North Texas (Denton, Texas) and the Texas Military Forces Museum (Austin, Texas).

Procedures to be used

During the course of the project the Principal Investigator will gather:



artifacts of the team's work, after action reports from different phases of the effort, and open-ended interviews of the participants, parents, and other adult participants. At the conclusion of the project the investigator will collect copies of participant journals, final products, and individual's reflections on the experience. In addition, feedback from evaluators will also be solicited and collected.

#### Description of the foreseeable risks

There are no foreseeable risks associated with this research effort. The activities involved in this project are both voluntary and extracurricular. Participants may choose not to participate at any time. The instructional methods used in the project will those commonly associated with an experiential, constructivist, situated learning environment. To the extent possible, project activities will take place in a public setting with adult supervision. Parental involvement is welcomed. Minimal risks may be associated with the content of the student's work as a result of their interviews with veterans of World War II and the sometimes emotional nature of those experiences. The normal minimal physical risks associated with commuting may be encountered in order to perform interviews, visit museums, execute research in archives and libraries, and make presentations at various locations during the course of the study.

#### Benefits to the subjects or others

The people of the State of Texas in general, and the veterans and families of the military unit in particular, will gain an insight into the unit's history through the ensemble's published results. The project will be service-learning based with each participant donating a minimum of 250 hours across the course of the year. Participants will receive no school credit as part of their experience although it is predicted that the participant's sense of self-efficacy with regard to history research, public speaking, and writing will increase. It is hypothesized that participants will experience both cognitive and affective gains as they become experts within their area of research and publish their results.

#### Procedures for Maintaining Confidentiality of Research Records

The investigator will perform confidential educational research concerning the "History Without Borders" concept within the larger context of a public service project involving history research. The history project itself will be public and each student identified publicly as a part of the project. Participants will know each other, work together, and present their results publicly. However, that portion of the effort being investigated by the researcher and its research records will remain confidential. Participants will be identified by a code number on all research documents. Participant's consent forms will not be identified with the coded number assigned to the participant. Interviews will be

recorded using audio devices but not video in order to protect the identity of the participants. The principal investigator will seek to balance gender, SES, and ethnic identities within the research team in order to maintain confidentiality. Research reports will not identify individuals unless it is with the express written approval of the parents/guardians of the participants.

#### Review for the Protection of Participants

This research study has been reviewed and approved by the UNT Committee for the protection of Human Subjects. UNT IRB can be contacted at (940) 565-3940 or <http://www.unt.edu/ospa/irb/contact.htm> with any questions or concerns regarding this study.

#### Research Subject's Rights

I have read or have had read to me all of the above. Glenn T. Johnston has explained the study to me and answered all of my questions. I have been told the risks and/or discomforts as well as the possible benefits of the study. I have been told of other choices of treatment available to me.

I understand that I do not have to take part in this study and my refusal to participate or to withdraw will involve no penalty, loss of rights, loss of benefits, or legal recourse to which I am entitled. The study personnel may choose to stop my participation at any time.

In case problems or questions arise, I have been told I can contact Glenn T. Johnston at [phone number deleted] or [name and phone number deleted]. I understand my rights as research subject and I voluntarily consent to participate in this study. I understand what the study is about, how the study is conducted, and why it is being performed. I have been told I will receive a signed copy of this consent form.

\_\_\_\_\_  
Signature of Subject

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Witness

\_\_\_\_\_  
Date

For the Investigator or Designee:

I certify that I have reviewed the contents of this form with the subject signing above. I have explained the known benefits and risks of the research. It is my opinion that the subject understood the explanation.

\_\_\_\_\_  
Signature of Principal Investigator

\_\_\_\_\_  
Date

APPENDIX C  
PARTICIPANT ASSENT FORM

University of North Texas  
Institutional Review Board  
Research Assent Form

Subject Name:

Date:

Title of Study History Without Borders  
Principal Investigator Glenn Johnston

Description of the Study

This study will involve less than 10 students in an 18 month study of the "history without borders" concept. Designed to take place out of school as an extracurricular community service activity, this new method will involve the students in an intense investigation of the history of the 112<sup>th</sup> Cavalry, Texas National Guard, in World War II. Over the course of one year participants will perform historical research, analyze existing interviews of 112<sup>th</sup> Cavalry veterans, and conduct their own interviews of 112<sup>th</sup> veterans. The student participants will summarize their findings and present that summary to the Texas Military Forces in June, 2005. The project will not be part of the [school district name deleted] curriculum. Instead, it will be informally supported by the University of North Texas (Denton, Texas) and the Texas Military Forces Museum (Austin, Texas).

Research Subject's Rights

I have read or have had read to me all of the above. Glenn T. Johnston has explained the study to me and answered all of my questions.

I understand that I do not have to take part in this study and my refusal to participate or my decision to withdraw will involve no penalty, loss of rights or benefits. The study personnel may choose to stop my participation at any time.

In case problems or questions arise, I have been told I or my parents can contact Glenn T. Johnston at [phone number deleted] or [name, department, and phone number deleted].

I understand my rights as research subject and I voluntarily consent to participation in this study. I understand what the study is about, how the study is conducted, and why it is being performed. I have been told I will receive a signed copy of this assent form.

You are making a decision about whether or not you will participate in this study. Your signature indicates that you have decided to participate, that you have read or have had read to you the information provided in the Consent Form, and that you have received a copy of the Consent Form.

Assent of Child

The Child named  has agreed to participate in the study mentioned above.

\_\_\_\_\_  
Signature of Subject

\_\_\_\_\_  
Date

For the Investigator or Designee:

I certify that I have reviewed the contents of this form with the subject signing above. I have explained the known benefits of the research. It is my opinion that the subject understood the explanation.

\_\_\_\_\_  
Signature of Principal Investigator or Designee

\_\_\_\_\_  
Date

APPENDIX D  
ORAL HISTORY ANNOTATIONS AND EXCERPT

## Introduction

The HWB project made use of thirteen oral histories collected from 112<sup>th</sup> Cavalry veterans by this researcher, amounting to over 1600 pages of primary source material. Below are the annotations of the oral histories used in the project as well as an excerpt from the interview with Mr. Bill Garbo. The excerpt is included as an example of what oral history brought to the project as a primary resource.

### Oral History Annotations

HUDSON, Lloyd (b. 1924). Army veteran (A Troop, 112<sup>th</sup> Cavalry). His experiences in the Southwest Pacific Theater during World War II. Enlistment in the 124<sup>th</sup> Cavalry, 1940, at age sixteen; federalization of the National Guard, November, 1940; Louisiana Maneuvers, Summer, 1941; assignment to Fort Brown, Brownsville, Texas, 1941; transfer to the 112<sup>th</sup> Cavalry, 1942; maneuvers at Hueco Springs, Texas, 1942; assignment to New Caledonia, 1942-43; contracting dengue fever; combat on Woodlark Island, 1943; amphibious training on Goodenough Island, 1943; his wounds received during the amphibious landing on Arawe Island, December 15, 1943; evacuation to Townsville, Australia; comments about A Troop's camaraderie; evacuation to the States, 1944.

LAY, J. C. (b. 1926). Businessman, Army veteran (Troop A, 112<sup>th</sup> Cavalry, Texas National Guard). His experiences in the Philippines during World War II. Enlistment in the Army, August 29, 1944; assignment to the 112<sup>th</sup> Cavalry, Antipolo, Philippines, May, 1945; jungle patrols; Japanese night infiltration attacks; setting up ambushes; postwar occupation duty in Japan; demolition of Japanese armaments; relations with Japanese civilians.

CALVERT, Hugh (b. 1918). His experiences as a member of the 112<sup>th</sup> Cavalry, Texas National Guard, in the Southwest Pacific Theater during World War II. His youth during the Great Depression; ROTC at Texas A&M College and commissioning as a second lieutenant in the cavalry; ordered to active duty with the 1<sup>st</sup> Cavalry Division, Fort Bliss, El Paso, Texas, February, 1941; assignment to the 1<sup>st</sup> Reconnaissance Squadron; his transfer to Troop A, 112<sup>th</sup> Cavalry, Fort Clark, Brackettville, Texas; tank school at Fort Knox, Kentucky; transfer to Service Troop; assignment to New Caledonia; shift from being a horse cavalry unit to an infantry unit; assignment to Woodlark Island, 1943; operations on Arawe; Driniumor River Campaign; rotation back to the States.

KINGSLEY, Clarence (b. 1921). Army veteran (Troop E, 112<sup>th</sup> Cavalry, Texas National Guard). His experiences in the Southwest Pacific Theater during World War II. His decision to join the Texas National Guard, 1936; the federalization of the National Guard, November 18, 1940; training at Fort Bliss, El Paso, Texas, 1940-41; additional training at Fort Clark, Brackettville, Texas, 1941; Louisiana Maneuvers, summer, 1941; breaking in cavalry horses; assignment to New Caledonia, 1942-43; decision to discontinue the use of horses because of the jungle terrain and conversion to a regimental combat team; his training in a machine gun platoon; the landing on Woodlark Island, July, 1943; amphibious landing and combat on Arawe, New Britain, December 15, 1943; nighttime combat on New Britain; problems with Japanese snipers; landings on New Guinea and the Driniumor River Battle, June-July, 1944; his description of jungle combat conditions; invasion of the Philippines, November, 1944; combat on Leyte; advancing through the Ormoc Valley.



FORTENBERRY, George E. (b. 1920). College professor, Army veteran (112<sup>th</sup> Cavalry, Texas National Guard). His experiences in the Southwest Pacific Theater during World War II. His attendance at various schools in Texas and Oklahoma during the Great Depression; decision to join the Texas National Guard, 1940; basic cavalry training, Fort Bliss, El Paso, Texas, 1940; assignment as a clerk to the veterinary section; assignment to Fort Clark, Brackettville, Texas, February, 1941; return to Fort Bliss, 1941, for additional training; return to Fort Clark; shipment overseas to Noumea, New Caledonia, July 8, 1942; his transfer to the Medical Detachment as a clerk; various stories about his experiences in New Britain, New Guinea, and the Philippines; first-hand and second-hand accounts of combat at Aitape, New Guinea; tropical diseases, combat-related psychological problems; everyday camp life in the Southwest Pacific.

CHENNAULT, James R. (b. 1915). Army veteran (112<sup>th</sup> Cavalry, Texas National Guard). His experiences in the Southwest Pacific Theater during World War II. His youth in rural Mississippi; his move to Texas in 1939; his decision to join the 112<sup>th</sup> Cavalry, 1940; mobilization of the Texas National Guard, November, 1940; Louisiana Maneuvers as part of the 3<sup>rd</sup> Army, Summer, 1941; training at Fort Bliss, El Paso, Texas, and Fort Clark, Brackettville, Texas, with Machine Gun Troop, 1941-42; assignment to New Caledonia, 1942; combat on Woodlark Island, 1943; combat around Arawe, New Britain, 1943-44; combat on Aitape, New Guinea, 1944; the Battle of Driniumor River, 1944; rotation to the States, 1945; assignment to a pack mule outfit, Fort Riley, Kansas, 1945; discharge from the Army, July 2, 1945; the daily routine of life in the horse cavalry.

NANCE, Thomas W. (b. 1919). Army veteran (E Troop, 2<sup>nd</sup> Squadron, 112<sup>th</sup> Cavalry, Texas National Guard). His experiences in the Southwest Pacific Theater during World War II. His boyhood in Dallas, Texas; school activities; the Great Depression in Dallas; his enlistment in the Texas National Guard, October 15, 1940; horse cavalry training and maneuvers at Fort Bliss, El Paso, Texas, and Fort Clark, Brackettville, Texas; duty along the U.S.-Mexico border after the Pearl Harbor attack; Noumea, New Caledonia, August, 1942; decision to make the 112<sup>th</sup> a dismounted cavalry unit; combat on Woodlark Island, June-December, 1943; creation of a regimental combat team with the 112<sup>th</sup> Cavalry and the 148<sup>th</sup> Field Artillery on Goodenough Island; invasion of New Britain, December 15, 1943; combat around Arawe, New Britain, in coordination with the 158<sup>th</sup> Infantry Battalion and a tank battalion of the 1<sup>st</sup> Marine Division; his serious wounds from Japanese machine gun fire on Arawe; evacuation to the States and spending one year in a body cast at Ashburn General Hospital, McKinney, Texas; additional recuperation in VA hospitals; his postwar activities with the 112<sup>th</sup> Cavalry Association.

KELLEY, Ernest L. (b. 1921). Army veteran (A Troop, 112<sup>th</sup> Cavalry, Texas National Guard). His recollections as a member of the 112<sup>th</sup> Cavalry in the Southwest Pacific Theater during World War II. His life as a youth in northeast Texas; family experiences during the Great Depression; his long-time love of mules and horses; his decision to join the 112<sup>th</sup> Cavalry, Texas National Guard, November, 1940; mobilization of the Texas National Guard, November 18, 1940; training with horses, Fort Bliss, El Paso, Texas, 1940-41; advanced training at Fort Clark, Brackettville, Texas, 1941; return to Fort Worth for additional mounted training, 1941; Louisiana Maneuvers, July-September,

1941; voyage from San Francisco to New Caledonia, 1942-43; assignment to Townsville, Australia, 1943; assault on Woodlark Island, July, 1943; dismounting of the cavalry and its conversion to regular infantry; the landing at Arawe, New Britain, December, 1943; combat around Arawe; comments about the fighting qualities of Japanese soldiers; his role as a machine-gunner; rest and relaxation in Australia, July, 1944; combat near the Driniumor River, Aitape, New Guinea, June, 1944; invasion of Leyte, Philippines, November, 1944; combat around the Ormoc Valley; hospitalization due to malaria; landings at Lingayen Gulf, January 27, 1945; his battle wound from a Japanese machine gun burst; rotation back to the States, August, 1945, and subsequent discharge.

BRABHAM, Charles C. (b. 1923). Army veteran (Troop A, 112th Cavalry, Texas National Guard). His experiences in the Southwest Pacific Theater during World War II; his youth in Dallas during the Great Depression; his decision to join the 112th Cavalry, 1939, at age sixteen; mobilization and assignment to Fort Bliss, El Paso, Texas, 1940; Louisiana Maneuvers, summer, 1941; assignment to Fort Clark, Brackettville, Texas, and duty along the Texas-Mexico border; assignment to New Caledonia, August, 1942; assignment to New Guinea, June, 1943; landings on Woodlark Island, June, 1943; landings at Arawe, New Britain, December 1943; Battle of the Driniumor River, Aitape, New Guinea, July, 1944; assignment to Leyte, Philippines, 1944; his medical evacuation due to malaria, dysentery, and hookworm, December 1, 1945.

MAILER, Norman K. (b. 1923). Novelist, Army veteran (Intelligence and Reconnaissance Platoon, 112th Cavalry, Texas National Guard). His various reminiscences based on his experiences in the Philippines during World War II.

Comments about Army life in general; jungle patrols; observations on the Japanese surrender in Tokyo Bay, September 2, 1945, the role of his wartime experiences in his novel, *The Naked and the Dead*.

GARBO, William (b. 1924). Landscape architect, Army veteran (112th Cavalry, Texas National Guard). His experiences with G Troop, 112th Cavalry, in the Southwest Pacific Theater during World War II. Growing up in an Italian-American family in Mississippi during the Great Depression; volunteering for the draft and processing at Camp Shelby, Hattiesburg, Mississippi, 1943; basic training at Camp Lee, Petersburg, Virginia, 1943; War Dog Training Center, San Carlos, California, October-December, 1943; assignment to the 26th War Dog Platoon, 1944; assignment to New Guinea, 1944; Battle of the Driniumor River and his attachment to elements of the 32nd Infantry Division, 1944; jungle patrols on New Guinea with his dog; his transfer to Troop, 112th Cavalry, and the invasion of Leyte, Philippines, October, 1944; his new duties as a machine-gunner; small unit combat in the Philippines; living conditions in the Philippine jungles; comments about the fighting prowess of his comrades in the 112th Cavalry; comments about replacements; jungle patrols on Leyte and Luzon; the 112th's activities around Marungko and Antipolo, Luzon, 1944-45; descriptions of cannibalism by Japanese soldiers; his wounds from artillery shrapnel and evacuation by helicopter; his return to the 112th Cavalry and preparations for the invasion of Japan; witnessing the Japanese surrender in Tokyo Bay, September 2, 1945; occupation duty at Tateyama, Honshu; relations between Japanese civilians and American occupation troops; destruction of Japanese defensive fortifications and weapons on Honshu; his return to the States, December 1945, and mustering out of the service.

HUGHES, W. W. (b. 1918). Army veteran (3rd Platoon, A Troop, 112th Cavalry, Texas National Guard). His experiences in the Southwest Pacific Theater during World War II. His boyhood in Dallas, Texas, during the Great Depression; his decision to join the Texas National Guard, in 1940; caring for the troop's horses at Fort Bliss and Fort Clark, Texas; Louisiana Maneuvers, 1941; assignment to New Caledonia, 1942; invasion of Arawe, New Britain, December, 1943; combat on Arawe; Battle of the Driniumor River, New Guinea, June, 1944; the Philippines Campaign, 1944-45; his return to the States and separation from the military.

MOODY, Ben (b. 1920). Army veteran (F Troop, 112th Cavalry, Texas National Guard). His experiences in the Southwest Pacific Theater during World War II. His youth during the Great Depression; his father's leather shop in Kilgore, Texas, during the oil boom of the 1930s; influence of German leather carver Solon Aaron on his life; his education; his decision to join the Texas National Guard, November 18, 1940; his work in the repair and maintenance of cavalry equipment; New Caledonia, August, 1942-June, 1943; Woodlark Island landings, 1943; operations at Arawe, New Britain, 1943-44; Battle of the Driniumor River, New Guinea, June-August, 1944; problems with inaccurate maps; his evacuation due to intestinal ulcers, malaria, and dengue fever.

#### Oral History Excerpt

Garbo:                    Now, let's go back to "Horseshoe Hill." My squad got some mail one day, and we all sat around and read our letters quietly. I remember that, all of a sudden, one man in my squad started crying. He stomped his feet, got all upset, threw the letter down, and started walking down the trail toward that booby-trap. It was like he had lost his mind. He had gotten a "Dear John" letter from his wife. [Name deleted] jumped up as the boy started down the trail toward the booby-trap, and he tackled him. I mean, he tackled

him just short of the wire, and he pulled him back. We had picked up his letter, which he had thrown down, and someone said, "His wife has just left him for another man." We told him in no uncertain terms, "Look, you're going to have to cope with this, buddy. Don't let this get to you." Later, he came close to shooting himself to get out of combat. He was a mental wreck, and once a man gets like that, you just really can't trust him. I've forgotten where he was from, but he was a good man. He just broke under the pressure.

I took out a three-man patrol [when we were] on "Horseshoe Hill" and was shot at by our own artillery. Friendly fire (chuckle). Friendly fire!

Johnston:

An incongruous term!

Garbo:

You know, I just happened to think of something. Can I go back and tell you something about the Driniumor River?

Johnston:

Yes, I'd love to hear it.

Garbo:

I distinctly remember those C-47s coming down, and they would have their flaps down. They looked like they were just creeping along over the riverbed at the Driniumor River, and they would throw out our supplies. When I send you this tape of [name deleted], he talks about that, and he also talks about the fact that one time the Japanese got to our supplies before we could. He got so mad that he stomped his foot and said, "Go stop that!"

So, [name deleted] and about three other men took off with "Tommy" guns and rifles, and they disappeared in the brush. They came back with all those supplies! We heard the firing. I mean, they let them have it! They said, "By George! They're not going to get our supplies!"

At "Horseshoe Hill," we were supplied by truck. The trucks could come up and stop at the end of the road, and then they could carry our supplies on up.

I did several patrols from "Horseshoe Hill," and we were getting ready to leave. We were getting ready to be relieved, and I think I made one more patrol, one last patrol. We had a new officer with us who had just come in as replacement, a lieutenant. I was a sergeant. He said to me, "Soldier, you've been in combat, and I'm going to rely on you to give me the benefit of your experience because I'm new." You know, I admired that so much, because so often you had officers who didn't want to listen to anybody. They knew it all. He knew he was going in harm's way, and he knew that somehow this twenty-one-year-old [could help him].

End of excerpt.

APPENDIX E  
REGIMENTAL RECORD EXAMPLE

A wide variety of regimental records were used in the project. The regiment had the standard staff functions for the Army of the time: S-1 (Personnel), S-2 (Intelligence), S-3 (Operations), and S-4 (Logistics). Each of the staff functions kept their own staff diaries throughout the war and generated staff records. Below is an example of a staff diary entry for one day in August 1944, a period during which the regiment was involved in a large battle at the Battle of the Driniumor River, New Guinea. Thousands of pages of staff diaries were generated by the regiment during the war.

Supply

a. Location of Adm. Troops and Installations: APO 705

b. Status of supply - APO 705  
 CLASS I - 1 1/3 day Kration 3 day B ration  
 CLASS II - 10 days  
 CLASS III - None  
 CLASS IV - 10 days  
 CLASS V - No change

c. Transportation: No change

d. Evacuation:

Battle Casualties	Non-battle Casualties (Includes Disease)	Total
3	9	12

e. Activities: The following items by native train to BALDY FORWARD AM 2 August; 6 pigeons, 3 cs gun oil, 3 cs D ration, 20 cs C ration ( to augment K ration) 10 cs fruit, 10 cs milk, 2 LMG. Received the following request from Baldy Forward; 100 blankets, 10 cs D ration, 15 boxes grenades frag , 46000 rds Cal 30 MG ammo. ACTION: Dropped 8 cs frag grenades, and 100 blankets AM 2 August. Remaining 8 cs frag grenades dropped AM 3 August. 46000 rds MG ammo dropped by BLOCK FORCE AM 2 August 10 cs D ration by native carrier, AM 3 August. 1 Day K ration dropped to BALDY FORWARD & BALDY REAR.



APPENDIX F  
ARMY RECORDS EXAMPLE

Auth: C. G. DIRECTOR

Init: glt

Date: 4 December 1943

HEADQUARTERS, DIRECTOR TASK FORCE  
APO 323

LEADS, 4 December 1943

FO 1

Maps: W. D. CE Map ARABIC 1" - 4 mi.

3 sheets 4 mi. Strategic map, CENTRAL, 1" - 4 mi.

COCKNEY sheet. WD CE Prov map, ARABIC, 1:63,360

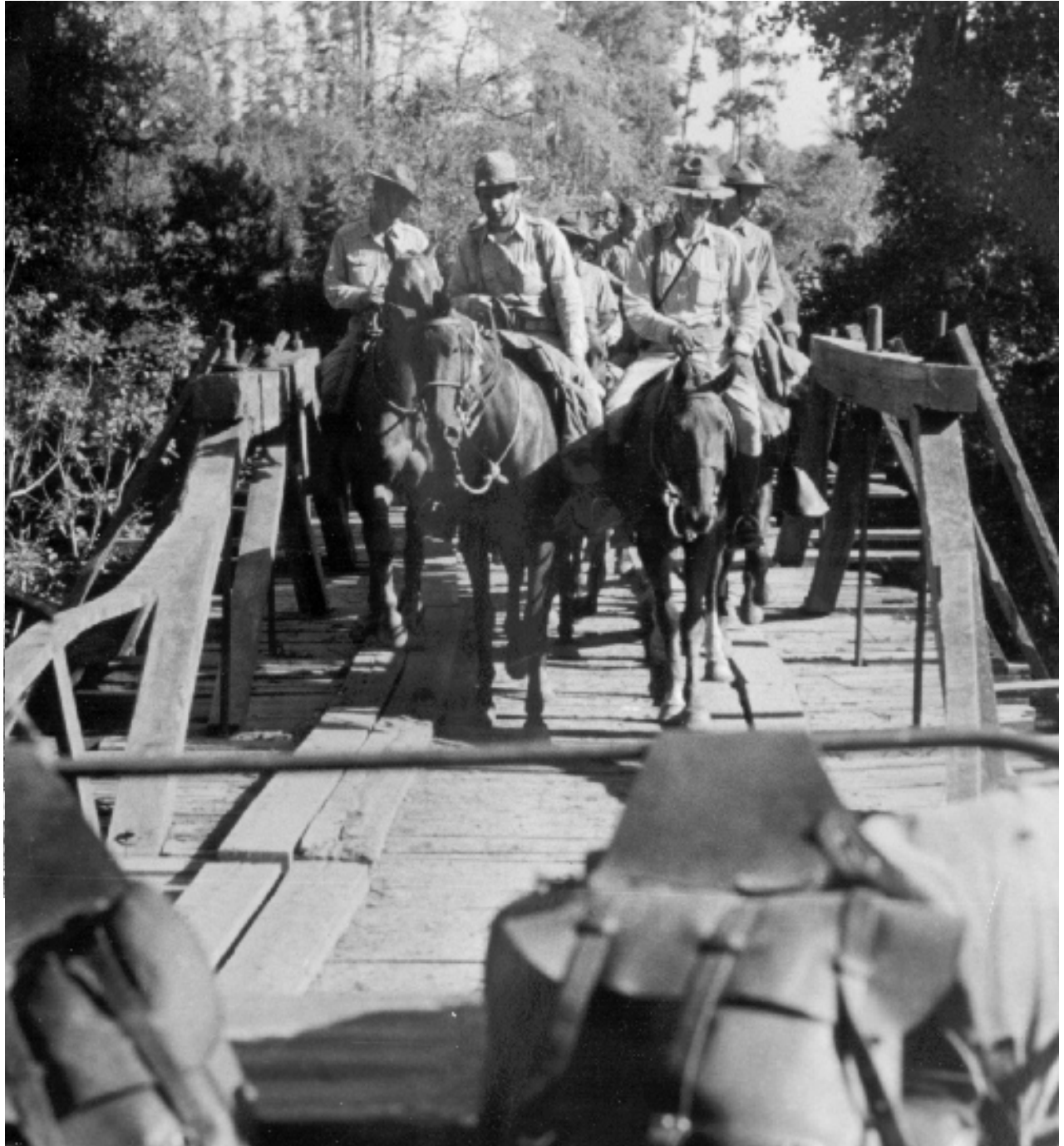
1. a. Enemy Info in Intelligence summaries and ANNEX No. 2 - Intelligence.  
Enemy estimated to be in DIRECTOR Area 50 - 500.
- b. (1) ESCALATOR initiates offensive Opns in the BACKLANDER and DIRECTOR areas for the purpose of establishing airdrome facilities and light naval facilities on ARABIC.
- (2) Allied Air Force supports Opns of DIRECTOR by:
  - (a) Denying seaborne reinforcements and supply of enemy occupied areas in W ARABIC by intensive blockade established in conjunction with Allied Naval Forces at the earliest practicable date.
  - (b) Providing intensive preliminary aerial bombardment of the DIRECTOR area as required and close air support of Opns to seize objectives.
  - (c) Neutralizing hostile air and naval Opns along S Coast ARABIC.
  - (d) Providing anti-submarine escort and air protection of over-water Tr and supply movements of ESCALATOR.
  - (e) Providing one squadron of medium bombers on air alert over the Obj area, subject to call from H / 15 minutes to H / 2 hrs 15 min.
  - (f) Providing two squadrons of medium bombers on ground alert until H / 9 hrs L.
  - (g) Providing fighter cover for the operations during Z day.
- (3) ALLIED NAVAL FORCES: Support Opns DIRECTOR by:
  - (a) Destroying threatening hostile naval forces and providing naval protection of areas occupied.
  - (b) Transporting and landing Trs and supplies at times and places designated by CG, DIRECTOR.
  - (c) Denying seaborne reinforcements and supply of enemy occupied areas in W ARABIC by intensive blockade established in conjunction with ALLIED AIR FORCE at earliest practicable date.
  - (d) Establishing light naval facilities in DIRECTOR area for protection of the SE flank of over water Opns in BOILING POINT.
  - (e) Protecting lines of Comm.
  - (f) Providing preliminary Naval gunfire bombardment of beaches DIRECTOR Area from H-18 min to H-4 min. Ranging shots will begin H-20 min. Fire will be lifted when leading assault wave is within 1200 yards of West beach.
  - (g) Furnishing supporting naval gunfire on call of the DIRECTOR Force during progress of landing and after landing is effected. (For this purpose, Naval Shore Fire control party will be organized and accompany Headquarters of the leading assault element of the 112th Cavalry.)
  - (h) Protecting landing waves by machine gun fire and rocket fire from small boats.
  - (i) Providing a Beachmaster with a naval beach party to facilitate locating the beaches, debarkation, and unloading craft in DIRECTOR Area.
  - (j) Providing landing craft with crews for subsequent Opns.

S E C R E T

- 1 -

DECLASSIFIED  
Authority NND 735017  
By AB NARA Date 6/24/01

APPENDIX G  
SIGNAL CORPS PHOTOGRAPH EXAMPLES



APPENDIX H  
COMBAT ART EXAMPLES

Combat doctor at Arawe, New Britain.

By D. Fredenthal (1914-1958).

Sketched December 1943.

(US Army Art Collection)



A Troop/ 112<sup>th</sup> Cavalry Survivors of Arawe Rubber Boat Landing

D. Fredenthal (1914-1958)

Sketched December 15, 1943, Arawe, New Britain



(US Army Art Collection)

APPENDIX I

ORAL HISTORY READING AND HIGHLIGHTING INSTRUCTIONS



## Introduction


During the first three months of the project, participants were exposed to a wide variety of primary source materials. The following instructions were provided the participants along with a number of highlighters of different colors. By color-coding their highlighting activities, participants could express their thoughts regarding the material they were reading.


### Participant Highlighting Instructions


#### History Without Borders




#### Instructions for Highlighting Your Oral Histories

PINK   
Things that really are interesting (Kind of like: “Oh, Wow!”)

YELLOW   
Stuff you would like to have me talk more about (“That’s neat--tell me more!”)

ORANGE   
Stuff you yourself would like to research more about (“Oh man! I’ve gotta learn more about that and I’m intrigued by it!”)

BLUE   
Boring, boring, boring--get it outa here!

APPENDIX J  
PARTICIPANT PREFERENCE INVENTORY

All participants took the modified MBTI (HumanMetrics, n.d.) found at <http://www.humanmetrics.com>. Due to the unexplained and undescribed modifications HumanMetrics has made to the MBTI, the inventory should not be used due to the lack of validity and reliability data associated with it. Participants in this study agreed that some questions were worthwhile in describing their personal preferences with regard to a number of items if their answers were simply taken at face value. While it would be a violation of copyright law to publish HumanMetric's copyrighted materials, the reader can go the following webpage and retrieve the material they have made publicly available: <http://www.humanmetrics.com/cgi-win/JTypes2.asp>. The questions the study participants found most descriptive of their personal preferences at face value are: 2, 6, 9, 10, 11, 15, 16, 17, 18, 20, 22, 23, 25, 26, 27, 28, 29, 30, 31, 39, 40, 41, 42, 46, 48, 51, 53, 55, 56, 57, 59, 69, 71, and 72.

APPENDIX K

SAMPLE SUBJECT KNOWLEDGE INTERVIEW QUESTIONS

## Sample Questions

- What were the immediate causes of WWII in Europe?
- Tell me about the immediate cause of WWII in the Pacific.
- What countries formed the Axis Powers?
- What nations were known as the Allied Powers?
- How powerful was the US military in 1930s when compared to other world powers?
- Once the US entered the war, what was its strategy with regard to Germany and Japan?
- The War Department partitioned the Pacific geographically into four theaters of operation. Tell me the names of the four Pacific theaters.
- What were we trying to protect when we sent troops to the Southwest Pacific in 1942?
- Where was the most important Japanese stronghold in the Western Pacific?
- Describe the difference between the Regular Army and the National Guard.
- Identify what the following items were in context of the 112<sup>th</sup> Cavalry: M1 Garand, M1 carbine, M1903 Springfield, M1911A1 Colt, M2 “Ma Deuce,” M3 “Grease Gun,” BAR, Alligator, Buffalo, APD, Thompson, LCI, LSD, 37-mm, and 60-mm.
- Convert the following to metric: .50 caliber, .22 caliber, and .30 caliber
- What are the officer and enlisted ranks in the Army?
- What was the organization/structure of a World War II cavalry regiment?

APPENDIX L  
PARTICIPANT INTERVIEW QUESTION EXAMPLES

## Introduction

The following questions are examples of the kind of open-ended questions posed to the participants as they engaged in one-on-one interviews with this researcher during the course of the project. Some questions ask the participant to engage in a task while others are more reflective in nature.

## Sample Questions

- Prior to beginning this interview, I had you read two documents. One is a section from the [112<sup>th</sup> cavalry] war diary. The other is a newspaper article. They both concern themselves with the 112<sup>th</sup> cavalry's attack on Arawe. Compare and contrast the two accounts of the first day's fighting at Arawe.
- Describe how the two documents differ in the way they present the facts.
- As a historian, how would you use each of those documents in your work on the regiment?
- Compared to your regular course of history in high school, how is this project the same or different in terms of its use of primary sources?
- What is your impression of the History Without Borders concept based on your involvement with the 112<sup>th</sup> cavalry project so far?
- Of all of the tasks you have undertaken as part of this project, which has been the toughest and why?
- Of all of the primary sources that we have used so far, which was the one, or which were the ones that helped you the most, and why do you believe they were helpful?
- Throughout the early part of this project, you were expected to make sense of primary sources on your own with little help from the project leader. What techniques have you developed that allow you to make sense of the material?
- Throughout this project, we have made use of a wide variety of primary sources. As a historian, how do you sort out which primary sources you are going to trust and which ones you are not?
- From a historical perspective, which of the primary sources we have used in the project lend themselves toward a biased interpretation of the event?
- With regard to your performance in this project, what is your biggest concern right now?

APPENDIX M  
PROJECT AUDIENCE QUESTION EXAMPLES



## Introduction

The HWB project concluded with the publication of a final report chronicling the activities of the 112<sup>th</sup> Cavalry during World War II. That report relied heavily on the thirteen oral histories of the 112<sup>th</sup> Cavalry veterans originally co-authored by this researcher. Since the purpose of the HWB project was to create that history, it seemed appropriate to distribute copies of that report for review by the veterans, families of veterans, military historians, and educators for their evaluation. The majority of the recipients were familiar with the HWB project, its participants, and its activities. The following are samples of the questions asked of those individuals as part of their evaluation of the product.

### Sample Questions

- What is your opinion concerning the value of such a project to its participants and to the community at large?
- To what extent do you believe the oral history quotations in the final report add to its readability?
- Do you accept the draft final report (leaving aside the style and grammar issues of the draft) as a piece of history? Why?
- If you were a teenager, would this type of project interest you? Why?
- Which part(s) of the final report did you like best? Why?
- Were there any errors, omissions, inaccuracies, or instances of historical non-professionalism that caught your eye? (Please be specific)
- How important is this document to you as a relative of a 112th Cavalry veteran?
- What did the report capture that you remember from hearing stories about the 112th?

APPENDIX N  
TEMPLATE FOR 112<sup>th</sup> CAVALRY DAY LEGISLATION

## RESOLUTION

WHEREAS, The 60th anniversary of the raising of the U.S. flag on Mount Suribachi during the Battle of Iwo Jima on February 23, 1945, affords a fitting opportunity to recognize the important role of the Battleship Texas in our nation's history; and

WHEREAS, The Battleship Texas lent gunfire support and antiaircraft fire to the landing on Iwo Jima, an essential base of U.S. operations toward the end of World War II; commissioned in 1914, the ship participated in campaigns in the Atlantic Ocean, off the North African Coast and Cherbourg, and in the Pacific Ocean, at Iwo Jima and Okinawa, before becoming the flagship of the Texas Navy in 1948; and WHEREAS, A ship of many "firsts," the Battleship Texas was the first ship to launch an airplane, the first to mount antiaircraft guns, the first to control gunfire with directors and range-keepers, and the first to use commercial radar; furthermore, the ship was nicknamed the Lucky Ship for its low incidence of combat casualties; and WHEREAS, In 1983, the Battleship Texas was placed in the care of the Texas Parks and Wildlife Department, and today the ship finds her permanent home on the Buffalo Bayou at the historic site of the San Jacinto Battleground, near downtown Houston; the Battleship Texas Foundation, a nonprofit corporation led by business, civic, and retired military leaders and community volunteers, raises funds to restore the ship to its original glory and promote its educational value and historical significance; and WHEREAS, Built as a vessel of war, the Battleship Texas now symbolizes our commitment to freedom, and it is a source of great pride for all Texans; now, therefore, be it RESOLVED, That the House of Representatives of the 79th Texas Legislature hereby recognize the 60th anniversary of the raising of the U.S. flag at Iwo Jima, and commend the Battleship

Texas Foundation for its preservation of our nation's history and its care and restoration of the Battleship Texas; and, be it further RESOLVED, That a copy of this resolution be prepared for the members of the Battleship Texas Foundation as an expression of high regard by the Texas House of Representatives.

APPENDIX O

PARTICIPANT PRIOR KNOWLEDGE OF RELATED CONTENT

Following are examples of what the teenage participants were aware of with regard to project related content.

- *What were the immediate causes of World War II in Europe?*

Mike responded with the generally accepted assertion that Germany's invasion of Poland in September 1939 was the immediate cause of the war in Europe (Stewart, 2005). While the other participants responded with different answers, they were not without knowledge of what led to the war. Sierra replied, "Power struggles over the control of land and the invasion of the buffer ground of the Sudetenland by Germany." Victor responded that Germany entered the war for political and territorial reasons. He believed the other countries entered as a result of alliances. For example, Italy entered the war because of its alliance with Germany and England, Australia, and France allied themselves with each other. While much of what Victor said was true, he never provided the catalytic event which started the war. Like Victor, Juliet forwarded a theory of alliances. She described the root cause of the war in Europe as Germany's "severe economic depression which led to the rise of the Nazi regime, which, in turn, sought world domination." She described how Italy aligned itself with Germany and that England and France aligned to counter Germany. Juliet, however, never described the invasion of Poland as being the immediate cause of World War II in Europe. Delta was able to identify Germany's entry into the war as being caused by its "invasion of Poland." However, Delta was unable to provide any answer concerning why other nations joined in the war or how the invasion of Poland led to the war. Charlee responded that Germany entered the war "because of the Jews." Like Delta, she

provided no other information regarding how the war started in Europe nor how the other nations became embroiled in the war.

For military historians, understanding American operations in the Pacific Theater during World War II is dependent on understanding the overall context of the war with regard to the Pacific and European Theaters, as well as the China-Burma-India and American Theaters. The proximate cause of war in the European Theater is an important indicator of one's knowledge regarding the chain of events which led the U.S. to the strategy of a two front war. Although only Mike answered that Germany's invasion of Poland in 1939 was the immediate cause of the war in Europe he was not the only one with valuable information. As a team, the teenagers possessed several of the important factors which led to the war: German expansionism driven by dire economic conditions, Germany's history of annexation at gunpoint, Germany's racist policies, formation of a fascist alliance between Germany and Italy, formation of counter-alliances by non-fascist nations in Europe, and, the final straw, Germany's invasion of Poland. The team's distributed knowledge regarding the question displayed an understanding of many of the issues leading to the war as well as the immediate cause of the war in Europe.

- *What was the immediate cause of World War II in the Pacific?*

The teenagers' had a better understanding of the immediate cause of World War II in the Pacific than in Europe. Three of the participants (Mike, Juliet, and Victor) identified the Japanese attack on the U.S. base at Pearl Harbor, Hawaii, as being the proximate cause of the Allied war in the Pacific. Delta believed that the U.S. entered the war because the U.S. "wanted to prevent total domination by Germany." She provided

no reason for the start of the war in the Pacific. Charlee provided no reason for the U.S. entering the war or the start of the war in the Pacific. Sierra, possibly confused by the entry of the U.S. into World War I versus World War II, stated that the entry by the U.S. into World War II was the “discovery of the Zimmerman Telegram.” She provided no cause for the start of the war in the Pacific. None of the participants included China as an ally of the United States during the war and only one teenager, Mike, was able to identify Japan’s invasion of China as the root cause of China’s entry into the war.

Military historians generally identify the Japanese attack on U.S. forces in Hawaii on December 7, 1941 as the immediate cause of the war in the Pacific (Newell, n.d.). Just as the question dealing with the proximate cause of war in the European Theater dealt with an important indicator of one’s knowledge regarding the chain of events which led the U.S. to the strategy in that theater, the similar question regarding the Pacific theater would provide similar indicators of knowledge. That three of the six teenagers were knowledgeable of the immediate cause of World War II in the Pacific is positive when compared to their responses regarding the immediate cause of the European war. Unfortunately, contrary to the teenager’s performance regarding the cause of war in Europe, those who were unable to identify the immediate cause of the outbreak of World War II in the Pacific also lacked knowledge regarding other more long-term causes. The team’s distributed knowledge regarding the question was correct, precise, but minimal.

- *Once the US entered the war, what was its strategy with regard to Germany and Japan?*

Only Victor provided information regarding this question and, even then, his answer was based on a retrospective view of our actions as opposed to the strategy the



U.S. developed in response to the situation at the time. In other words, Victor replied based on what we know now as opposed to what we decided then. He responded that the U.S. strategy toward Germany was to “join the other Allies in battles” against the German Army. Regarding Japan, his response was that our strategy involved “island hopping and nuclear bombing.” The other participants could provide no information regarding the question.

A military historian responding to the same question would most likely have focused on what is frequently called the Germany First strategy. Agreed upon by the U.S. and Great Britain at the ARCADIA Conference in 1941, the strategy involved making the destruction of the German threat the initial and primary Allied strategic objective (Matloff, 1969). For a variety of reasons, the Allies would go on the strategic defensive in the Pacific until Germany was defeated. Once the German threat was defeated, however, the Allies would switch their main effort to nullifying the threat posed in the Pacific by Japan. The importance of this knowledge to a military historian of the war in the Pacific is that it sets the stage for the deployment of troops to the Pacific, the allotment of equipment and supplies, and, consequently, the conduct of operations in the Pacific. In short, it would influence virtually every aspect of the 112<sup>th</sup> Cavalry’s experience after December 7, 1941. The team’s distributed knowledge regarding the question was minimal.

- *How powerful was the US military in 1930s when compared to other world powers?*

Victor and Mike responded similarly when they ranked the United States outside the top 10 military powers during the 1930s. Mike said that the U.S. was “17<sup>th</sup> in the world” while Victor said “somewhere between 12<sup>th</sup> and 17<sup>th</sup>.” Delta and Charlee’s

responses disagreed with those of Mike and Victor. Delta thought, “the U.S. military was very powerful,” while Charlee responded that “it was one of the top” militaries in the world. Juliet and Sierra said they did not have any idea what the answer was.

According to the report of the Army Chief of Staff, General Douglas MacArthur, in 1933 the United States stood 17<sup>th</sup> in the world (Stewart, 2005). A military historian would find this information significant in that it situates the U.S. as a nation which would experience significant operational issues as it mobilized following the outbreak of World War II. By committing to a two-front war with an undersized military, the U.S. placed a premium on its existing active duty forces. Consequently, National Guard units, often lacking training and the first rate equipment issued to the Regular Army, became the point of the Army’s spear in the Pacific after the fall of the Philippines in 1942. This was a significant part of the context of the 112<sup>th</sup> Cavalry’s experience in the Pacific Theater. Although the team possessed distributed knowledge regarding the relative power of the U.S. military during World War II that knowledge was contradictory.

- *The War Department partitioned the Pacific geographically into four theaters of operation. Tell me the names of the four Pacific theaters.*

Juliet was able to recall the South and Southwest Pacific theaters. None of the other participants was able to name any of the theaters in the Pacific area.

Of the four theaters of operation in the Pacific area (North, Central, South, and Southwest Pacific Theaters), the 112<sup>th</sup> Cavalry operated initially in the South Pacific Theater and, subsequently, in the Southwest Pacific Theater. Each theater had a commander and a strategy separate, although sometimes complementary, to the other theaters in the Pacific. To a military historian, to be told a theater is to know the commander(s), strategy, geography, climate, and major campaigns of that theater as

well as its relationship to the other theaters in the Pacific. The distributed knowledge of the topic among the expedition participants was limited to non-existent.

- *What were we trying to protect when we sent troops to the Southwest Pacific in 1942?*

None of the participants was able to supply any information regarding the question.

A historian of the Pacific War would know that the Southwest Pacific Theater included the islands of New Guinea and New Britain, as well as the Netherlands East Indies, the Philippines, and the continent of Australia. When U.S. forces were sent to the Southwest Pacific in 1942, they were meant to stop the Japanese drive toward Australia. It was in the Southwest Pacific Theater that the 112<sup>th</sup> Cavalry conducted combat operations for nearly two years.

- *Where was the most important Japanese stronghold in the Western Pacific?*

None of the participants was able to supply any information regarding the question.

The most important Japanese stronghold in the Western Pacific was their military base at Rabaul on the island of New Britain (Nalty, 1994). The Japanese bastion of Rabaul allowed its military to exert influence over a wide area to include the Solomon Islands and much of New Guinea. Consequently, it stood in the way of U.S. troops fighting their way back to the Philippines in 1943. The strategy by which the U.S. hoped the Japanese could be defeated on New Britain was designed by the commander of the Southwest Pacific Theater, General Douglas MacArthur. It had as its first action an amphibious assault against the Japanese garrison at Arawe, a weakly defended portion of New Britain. The lodgment of U.S. forces at Arawe would serve to divert the

Japanese from the major U.S. attack against New Britain at Cape Gloucester which would take place two weeks later. The 112<sup>th</sup> Cavalry was chosen as the unit to make the diversionary amphibious assault at Arawe. The participants had no knowledge regarding the Japanese base at Rabaul or the island of New Britain.

- *Describe the difference between the Regular Army and the National Guard.*

Delta explained the difference as “the Regular Army always had to fight in battle and went overseas. The National Guard did a little less fighting and stayed in the nation.” Charlee responded by saying that “the Regular Army is on constant active duty. The National Guard helps at home, for example national disasters, but are occasionally sent overseas.” Juliet, Mike, Sierra, and Victor could not provide any information regarding the question.

Military historians realize there are major distinctions between the National Guard and the Regular Army. During the period between World War I and World War II, there was a gulf between the two with regard to training and equipment. Funded primarily by the states which raised them, the National Guard in any state was usually under the command of that state’s governor. Trained and equipped primarily to enact a governor’s policies during state emergencies; the National Guard was rarely called into federal service. With little money available from the state governments for modernization during the Depression, the National Guard often made do with equipment left over from World War I. That the 112<sup>th</sup> Cavalry was a Texas National Guard unit provides context which helps the historian better explain that regiment’s story from 1940 through 1942. Expedition participants had only a minimal understanding of the difference between the

Regular Army and the National Guard. This was true at both an individual and a collective level.

- *Questions regarding ranks, weapons, and cavalry organization .*

Regarding ranks within the Army, Charlee was able to identify a private as being an enlisted rank while adding that lieutenants, majors, and generals were officers. Victor identified a private as being enlisted. Delta identified the ranks of lieutenant, colonel, and general as being officers. Juliet identified lieutenants and generals as officers and privates as well as privates first class as being enlisted. Mike and Sierra provided no response with regard to Army ranks. The distributed knowledge of the group correctly identified four of nine officer ranks while correctly identifying two of eight enlisted ranks as well. Individual knowledge of the 17 Army ranks queried was minimal to non-existent.

Concerning background knowledge of weapons and equipment from World War II, Mike was able to correctly identify 7 of 15 items. Omitting equipment and focusing only on weapons, Mike was able to identify 7 of 10 weapons. No other participant ventured to identify any of the weapons or pieces of equipment listed in the query. While Mike's correct responses meant that the team's collective knowledge regarding weapons was fair, individually, except for Mike, participant knowledge of weapons and equipment was non-existent. In a related exercise, participants were asked to convert various calibers of weapons into their metric equivalents. Mike was able to make a close approximation of the conversion of two of three calibers to their metric equivalents. No other participant felt able to attempt the conversion. Once again, while Mike's correct responses meant the team's collective knowledge regarding metric conversions was fair, individually, except for Mike, participant knowledge of the metric equivalents to

standard U.S. Army weapon calibers was non-existent as was their ability to develop an on-the-spot equation or other tool to help in the conversion.

Finally, each of the participants was asked to describe the structure of either a standard infantry regiment or a cavalry regiment during World War II. None of the participants attempted to describe the structure of either of two types of regiment.

APPENDIX P

A SMALL LESSON IN THE PRACTICE OF HISTORY

Finding that weapons terminology was an obstacle to a few of the teenagers engaging with the material, in the following excerpt I try to explain: (a) why the terminology was important, (b) how it relates to Army organization through Tables of Organization and Equipment, (c) how its mastery could aid in the research effort, and (d) in part, how oral historians use anomalies in the data as a starting point for further investigation.

Glenn: How confusing is all of this weapons stuff to you?

Victor: Very.

Delta: Yeah.

Glenn: I think there are a lot of questions about weapons.

Delta: I just kind of ignored it. I read that, okay, he uses a weapon, but... Okay, he uses it, I don't know what it looks like...

Victor: I can't understand it because I got so bored.

Delta: Yeah, it is very boring.

Charlee: I've found it interesting that he didn't just start out on M-16's, like, right now we do.

Glenn: One of the reasons we talk about weapons is because in the military we have a thing called a Table of Organization & Equipment (TO&E). A TO&E tells you for each type of outfit in the Army, what type of equipment and how many people are going to be in that outfit. So, here we have the book World War II Order of Battle by Shelby Stanton....

Delta: Oh gosh!

Glenn: I love TO&Es. Here is an example. Let's go to an infantry division. If you take a look at this, you will see that it resembles something like an Excel chart.

Charlee: Yeah.

Glenn: On the left column it says "Infantry Division" and it gives you a date. That date is the date that this TO&E became effective. So, this one is July 15, 1943. If you go down the left column it lists as categories "Officers," "Warrant Officers," "Enlisted Men," "Liaison Airplanes." [Glenn goes on reading the list of equipment in an infantry division.] So, all of this equipment goes down the left column including all of the weapons. Then, across the top are all of the different subunits of the division. [Glenn reads all of the different types of units.] Then we get to the one that says "Infantry Regiment 3X." What does that tell



you about infantry division in World War II when they say: "Infantry Regiment, 3X?"

Charlee: They have three of each weapon?

Glenn: You're close, but it means they have three infantry regiments in each infantry division. Then, under each unit you have numbers [quantities]. So, if we go to the Quartermaster Company, and you look at the intersection of the line for "Carbine, .30-caliber." And the column for Quartermaster Company you will see the number 148. What does that tell you?

Delta: That they used 148 carbines?

Glenn: Correct! That they used 148 M1 carbines in the Quartermaster Company. These are great tools, but nobody ever memorizes this stuff.

Delta: Yeah.

Glenn: But here is why it is very important [to an oral historian]. If you're interviewing somebody from an infantry division in World War II who was in the Quartermaster Company--

Delta: Yeah.

Glenn: --in 1944 and you ask him what kind of rifle he used, you would expect him to say an M1 carbine. That's because the TO&E tells you that they had 148 of them. When they don't say that, when they say an M1903 Springfield, what problem do you have?

Delta: Maybe they traded, or they have the wrong date.

Glenn: Okay, maybe their date is wrong, or, maybe, their outfit traded for some reason. But what is the fundamental, basic problem that you have got?

[Silence]

These TO&Es are produced by the Army. These are official documents. This is the Bible. You cannot requisition, you cannot get in, you cannot legally have in your unit anything which is not on your TO&E. So, the fundamental problem is this. You were supposed to have M1 carbines and you don't. For the historian, this is a banner day! Why is it like a big banner day for a historian?

Juliet: Because you found something interesting.

Delta: Because you found, like, an error.

Glenn: Right! [You end up saying,] "Oh, this is an anomaly! This is the first I've seen like this. This is not supposed to be like this, so this is interesting. Why didn't you have M1 carbines?" So, a lot of times when I talk on these interviews about weapons it is to sort out the fact that the 112<sup>th</sup> Cavalry didn't always have what the TO&E said they

should. Being a Texas National Guard unit, they got all of their weapons from the State of Texas not necessarily the Army. Then, they got put into federal service on?

Juliet: November 18, 1940.

Glenn: Well, they are a year or two or three or four into the war and they still do not have the weapons of the Regular Army people. They are still using stuff from World War I. They are still using--the one for me that is really cute--is the .45-caliber revolvers. They are still using, like, Wyatt Earp revolvers with quick draw holsters as opposed to the standard M1911A1 .45-caliber pistol that the rest of the Army was using.

When I interviewed Mr. Riley Chennault, who was in the Machine Gun Platoon, he talked about being real upset because he had been in an ambush and lost his revolver. He was so scared, he threw himself down on the ground and crawled 30 feet. Only then did he realize he had lost his revolver.

Charlee: Oh!

Glenn: Well, as a historian you sit back and you say, "Revolver? I thought everyone had M1911 semi-automatic .45-caliber pistols?" Well, no. According to Chennault, troopers with Service and Support Troop had .45-caliber revolvers. That was a new piece of information for me. Was there anyone else who could tell me they did? Could I corroborate this statement? So, I went online and found some pictures of the 112<sup>th</sup> Cavalry. The photographs showed men with revolvers in 1940-1941. So, this is all kind of detective work, which is part and parcel of what you do in this kind of history. You're going to be reading a lot about weapons. How important do you think it is to know about weapons? Weapons that your guys use at least?

Charlee Important?

Glenn: Pretty important (Team meeting, September 26, 2004).

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