

# *World History Bulletin*



# World History Association

Jared Poley

Editor

[bulletin@thewha.org](mailto:bulletin@thewha.org)

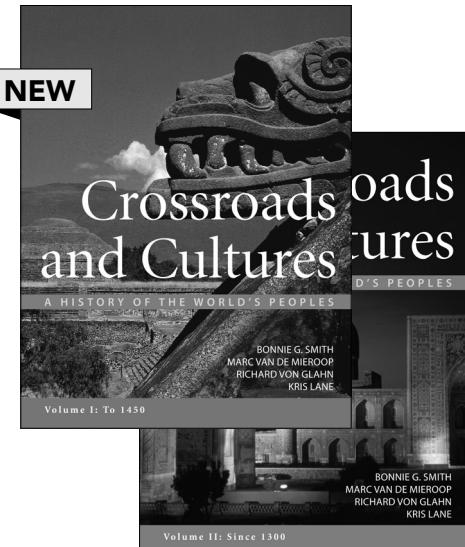
In This Issue

Editor's Note	1
From the Executive Director	2
Letter from the President	3
<b>Special Section: Teaching and Learning the Personal and the Present in World History</b>	<b>5 - 55</b>
Introduction	5
Clif Stratton (Washington State University)	
Making the Local History Connection: Community Colleges, World History, and Distance Education	8
David Dry (Miami Dade College, Ashville-Buncombe Technical Community College)	
It Takes a Group to Make an Oral History Film	10
Teresa Booker (John Jay college of Criminal Justice, City University of New York)	
I Would Walk 10,000 Miles: Teaching World history through Travel Planning	15
Erica L. Briesacher (Kent State University)	
Teaching Black Power in Trinidad and Tobago in Global Context	18
Jerome Teelucksingh (University of the West Indies, St. Augustine, Trinidad and Tobago)	
Teaching Global History through Contemporary Issues	22
Clif Stratton (Washington State University)	
Globalization, Past and Present: Is History Repeating Itself?	32
Richard Weiner (Indiana University-Purdue University Fort Wayne)	
Bringing <i>Casta</i> Paintings into the Classroom	39
Sally Stanhope (Georgia State University)	
Differences Between High School U.S. and World History Teachers in Kansas	56
Thomas W. Barker & Joseph O'Brien (University of Kansas, Department of Curriculum and Teaching)	
The 2012 WHA Symposium at Pannasastra University, Siem Reap, Cambodia	60
Paul Jentz (North Hennepin Community College)	
A New Lecture Series in World History	64
Paul Jentz (North Hennepin Community College)	
New England Regional World History Association Report	64
Minutes of the WHA Business Meeting	68
Minutes of the WHA Executive Council Meeting	72

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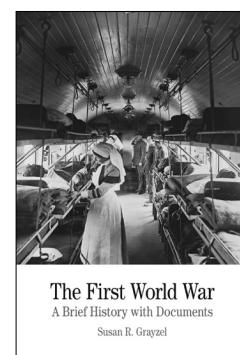
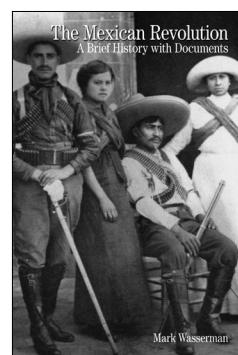
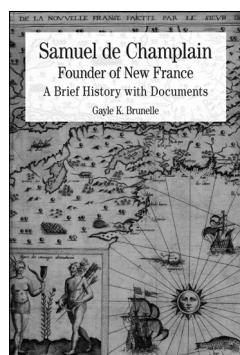
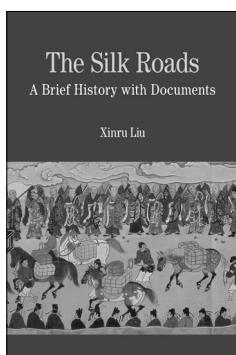
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Southeast World History Association  
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DEPARTMENT OF HISTORY  
College of Arts and Sciences  
P.O. Box 4117  
Atlanta, GA 30302-4117  
Phone: 404/413-6385  
Fax: 404/413-6384  
[gsu.edu/history](http://gsu.edu/history)

***Editor's Note:***

We are excited to present in the Spring issue of the *World History Bulletin* a special section dedicated to the theme of “Teaching and Learning the Personal and the Present in World History.” The essays and teaching plans contained in the section offer not only a set of pedagogical innovations for how to incorporate the “personal” into the classroom in meaningful ways, but they also demonstrate the critical edge that world historians generate in their work. This section of the *Bulletin* was guest-edited by Clif Stratton of Washington State University. The richly scholarly essays and pedagogical plans contained in the special section indicate the vitality and significance of this area of world history. I deeply appreciate the thoughtfulness and richness of the section, and I thank Clif – and the contributors – for their hard work.

As always, the *Bulletin* seeks to publish “short-form” essays on all aspects of historical scholarship including pedagogy, research, or theory. Topics may include the prehistoric, ancient, medieval, early modern, modern, and contemporary periods. Articles may include model syllabi or assignments, if applicable. Or, if you would like to guest-edit a selection of essays on a particular theme, please contact me at [jpoley@gsu.edu](mailto:jpoley@gsu.edu).

With all best wishes,

Jared Poley

***World History Bulletin***

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## *Letter from the Executive Director of the World History Association*

Winston Welch

Dear Members,

Living in Hawaii, it is often difficult to physically discern the seasons passing, since it is perfect weather every day. If the temperature drops below 75F, we lament how cold it is and literally break out the sweaters. If it goes above 85F, we remark on how hot it is. We celebrate time and events in different ways here—Santa arrives by canoe, and the largest birthday parties are for one-year olds. We have VOG and jellyfish outbreaks, along with annual whale migrations and the Makahiki season. Yet, despite outward differences, we are connected to the greater world like never before. We are just as likely to be in contact with someone in China as in Minneapolis to plan for a conference or to work with membership questions. With WHA members in about 40 countries, international communication and coordination is a daily event, and we are delighted to be involved with people from around the globe in all aspects of service to the organization. As our world gets ever smaller, the need for world history and the understanding it brings grows ever larger.

Our work at the World History Association headquarters, which has been graciously housed at the University of Hawaii at Manoa Campus, *is* truly global in scale, as the reach of world history continues to expand in importance and impact. Commensurate with this growth the field of world history, the WHA will not only offer its popular annual conferences, like the upcoming one in Albuquerque, but it also will offer symposia in locations where you want to go, targeting specific areas of interest, like the recent January 2012 Symposium in Siem Reap on Southeast Asia and World History. Please plan on attending upcoming events like the 2012 Albuquerque Conference, the Fall 2012 Xian “Silk Road in World History” Symposium, the April 2013 Symposium in Freemantle, Australia, with the theme of “Empire: Faith and Conflict,” the June 2013 Minneapolis Conference, and the July 2014 Costa Rica Conference. We welcome your suggestions on locations and hosts for future conferences and symposia.

Jackie Wah, our Membership and Conferences Specialist, and I are delighted to work on behalf of you, our members, in this terrific organization. The talent, dedication, and enthusiastic, collegial involvement by WHA members make this association the unrivaled success that it is. Thank you for your continued membership in the WHA. As always, please let us know your suggestions for the organization or how we may improve our services in any way.

Collegially,

Winston Welch  
Executive Director



## ***Letter from the President of the World History Association***

**Marc Jason Gilbert, Hawaii Pacific University**

Traditionally, the first act of a newly-elected president of the WHA is to preside over the WHA Business Meeting held in conjunction with the AHA annual meeting, as I did this past January in Chicago. This practice originated at a time when the WHA did not have its own annual meeting. Now that we do, it seemed to me that this was one tradition we could do without, a view shared by the members of the Executive Council. In the future, newly elected officers will begin their term of office at the first of the year and work, if elected for two years, through two annual WHA meetings during that term. The WHA will still have activities at the AHA, but the Business Meeting and Executive Council deliberations will occur at our own annual conference. Two face-to-face meetings a year were convivial, but much of our work is now done via e-mail. Moreover, this will lessen the financial burden on Executive Council members who have been attending two meetings a year—one at expensive AHA venues. Further, traveling to two meetings a year was proving such a burden as to discourage many WHA members from seeking an Executive Council seat.

This sign of maturity was immediately preceded by another. I had arrived in Chicago straight from Siem Reap, Cambodia where I oversaw the second WHA symposium in our new symposia series—this one had the theme of “Southeast Asia and World History.” The first symposium in the series was in Istanbul last year on “Byzantine and Ottoman Civilization in World History.” My past participation in history education programs in Cambodia, at the behest of Heidi Roupp for Teachers Across Borders, inspired me to pursue a WHA sponsored international meeting in the shadow of Angkor Wat. The symposium, held January 2-4, 2012, generated revenue for the WHA, and, according to post-conference survey results, was a great success. The survey found that the highlights of the symposium were much like those at the annual meeting in Beijing

this past July: lively panels, receptions, banquet entertainment, marvelous food, and excellent opportunities for historical tours.

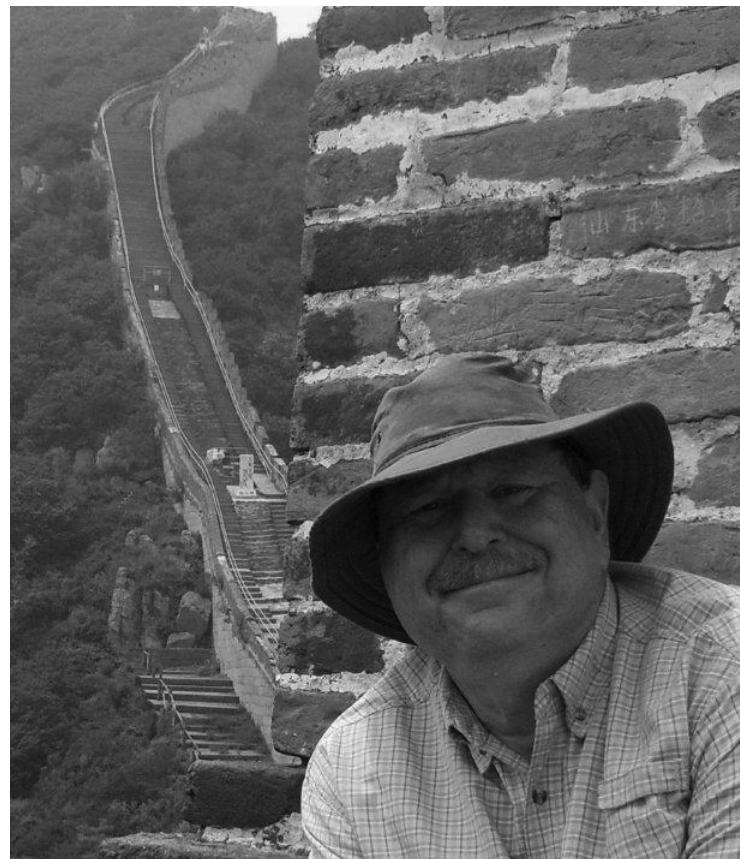
However, to me, as incoming WHA president, what was most exciting about the conference was that attracted historians whose training and/or specialization was not in world history, but

who were determined to use the symposium as an opportunity for them to explore and engage our still maturing field of study. Papers ranged across many familiar themes of world history, such as Diaspora communities, migration, global education, state formation, the rise of colonialism and nationalism, the environment, cross-cultural exchange, warfare and genocide. A single plenary session extending over an entire afternoon was devoted to the pedagogical concerns of world historians. The conference was graced by some WHA stalwarts working in North America at all levels of instruction, but these, like me, were heartened by the overwhelming presence of participants new to the field, drawn from over 18 countries who gave proof that these symposia—the next ones proposed for Xian, China in Fall 2012, and then in Fremantle, Australia in Spring 2013—are stimulating interest in world history and attracting WHA members outside North

America, another sign of the association’s coming of age.

Yet another sign of that maturity is the invitation extended to the World History Association to participate in the meeting of EURCLIO, Europe’s umbrella of historical associations, meeting in Turkey this April. We have accepted that invitation. Jonathan Shulman, a teacher at La Jolla Country Day School, Mihai Manea, professor emeritus and a WHA Life member from Romania, and I will travel there at our own expense to engage European historians in a discussion of the nature and direction of the world history movement from the experience and perspective of the WHA and its members.

Two months later, the WHA 2012 annual meeting June 23-27 will show signs of our further growth—our first conference to be held at a public high school, underscoring the WHA’s commitment to one of its key constituencies—K-12



*WHA President Marc Jason Gilbert  
Crafting new opportunities for members in China*

teachers. Longtime WHA members may have noted the higher registration fee, but most are by now aware of the great benefits that will flow from a longer conference with more inclusive meals, as well as opportunities developed by our hard-working secretariat for attendees to access exciting venues, historical tours and related family-friendly events. WHA conferences are the primary way the association funds itself and are critical to its survival. Every attempt is made to keep both membership and conference fees as low as possible while still providing an excellent conference experience. For those who may need additional support to be able to attend the conference, it should be noted that scholarships and registration fee waivers are available, with information on the WHA website.

New and equally valuable aspects of the meeting are less visible at a glance. I have been working closely with our Conference Program Chair, Maryanne Rhett, and Teaching Committee Chair James Diskant to give greater presence to the scholarship of teaching and to the challenges faced by teachers of world history at all levels of instruction. Alongside our perennial world history workshops will be a Focus Group open to all K-12 teachers to better assess and address the needs of WHA members in their schools. Panels, breakfasts and luncheon meetings will be arranged so as to prevent overlap or other program conflicts that might have previously limited participation in pedagogical interest groups and panels. Mentoring opportunities for instructors of all ranks will be made available from the first day of the conference. Forums will be held in which attendees will be able to exchange ideas with the authors of the books they use in their courses. Also for the first time, poster sessions will be held at the WHA meeting, which will be an integral and prominent part of the meeting. AP World History will also offer a workshop in conjunction with the conference lead by master teacher and WHA Past President Michele Forman.

There are surprisingly simple ways in which the World History Association can further advance its aims and activities without the fear of rising costs. Over the past few months, WHA members have received numerous e-mails, and even snail mail informing them of a wide variety of ways members can support the Association financially at virtually no cost to them. As explained in last spring's appeal from our immediate Past President, Al Andrea, there are many ways to tender such support, but thus far member-response has been limited, with few given to pursue even the simplest ways of building the coffers of the WHA. One of these is bookmarking and using

the link to Amazon.com that appears on our home page. Use of the WHA Amazon.com portal has no impact on the price of your purchases, but profits the WHA. Similarly, if you sign up for the first-year no fee WHA Visa card, which is also on our home page, the association receives an immediate and not inconsiderable finder's fee. If you chose to retain that card, the WHA receives a small fee every time you use the card. Again, use of the Amazon.com and the WHA Visa card will not cost you a penny more than if you bought from Amazon without that link or used another credit card. So, please, seriously consider these two painless means of supporting the WHA. I myself have taken these steps, while also obtaining a Life-membership and changing my living trust to include the WHA. Members can receive information about these and other options by contacting [thewha@hawaii.edu](mailto:thewha@hawaii.edu) or looking at the "Planned Giving" page on the website.

With sufficient funds, the WHA can keep membership fees and conference registration fees in check. It can also do more to support the participation of WHA members on government-supported panels and review boards tasked with proposing changes in world history curriculums that will affect every WHA member.

The avenues for the growth of the World History Association are expanding in number. It is up to you, the membership, to decide what resources it will have available to pursue them, as well as what direction you wish it to take. Please let me know of your concerns and desires. As a founding member and officer of the WHA and a founder of two WHA affiliates, you can be sure of the depth of commitment behind these words: nothing would give me greater pleasure than to discuss with you how we can keep the WHA moving forward.

Marc Jason Gilbert, WHA President

College of Liberal Arts  
Hawaii Pacific University  
1188 Fort Street Mall  
Honolulu, HI 96813  
Tel: 808-544-1169  
Email: [mgilbert@hpu.edu](mailto:mgilbert@hpu.edu)

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The World History Association is a community of scholars, teachers, and students who are passionately committed to the study of the history of the human community across regional, cultural, and political boundaries.

The 2012 World History Association Conference, hosted by **Albuquerque High School**, offers a wonderful opportunity to commune with an international community of world history scholars and teachers. Conference registration fee includes lunches featuring delicious New Mexico cuisine, evening receptions, coffee breaks, and fabulous sunsets.

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Our second official hotel, the **Embassy Suites**, is located adjacent to the conference venue and includes free breakfast and a daily Manager's Reception for attendees staying at the hotel. Ideal for those who may be traveling with families.

For more information about the WHA and to register for the conference, visit: [www.thewha.org](http://www.thewha.org).

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- A wide variety of panels, roundtables, and individual presentations
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- Bridges the gap between K-12 teaching and scholarly work
- An opportunity to meet world history teachers and scholars from around the globe
- Low conference registration rates
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- CE graduate credit available
- Outstanding historical sites, diverse cultural offerings, and recreational opportunities await before, during and after the conference



World History Association

## Special Section: Teaching and Learning the Personal and the Present in World History

### Introduction: Teaching and Learning the Personal and the Present in World History

Clif Stratton  
*Washington State University*

As a graduate teaching instructor not too many years ago, I assigned the post-9/11 introduction to Chalmers Johnson's *Blowback* (Owl, 2004) and the introduction to Mike Davis's *Planet of Slums* (Verso, 2006) as the final two readings for the second half of the world history survey. In the final week of the course we dealt with the not unrelated issues of post-1945 global poverty and the rise of American hegemony and its responses, and Johnson and Davis anchored our discussions. After class, two of my students approached me and said (and I paraphrase): *We really liked these readings. We would have enjoyed more like these.* They went on to explain that they cared about these issues because they had tangible relevance to the world in which they lived. They were excited that the readings and discussion confirmed their suspicions that Third World poverty was not the making of those mired in it and that 9/11 was not entirely unprovoked but that both now made sense only in the context of industrialization, imperialism, race, nationalism, and the Cold War – all themes we covered at length during the semester. Why, they seemed to be asking me, had it taken until the final week of the semester to make sixteenth-century New World empire building relevant? While I might have done well to caution them against blaming Columbus for 9/11, I was proud that they had begun to think *world* historically and to relate the past to the present.

As historians, we find contemporary and personal relevance in many if not all of the topics that we research, teach, and discuss among each other at conferences and in journal and discussion forums. We probably would not engage these topics otherwise. But conveying a deeper sense of historical relevance to students can prove challenging outside the realm of the contemporary histories of poverty, terrorism, and now the crisis of global capitalism and the political and social uprisings at home and abroad. Teaching five hundred, or worse, five thousand years of history in one semester seems only to exacerbate this problem. How does one strike a healthy balance between broad trends and local context? In an introductory course, how much freedom should students have to explore world history – an unwieldy discipline to start – through their own personal interests or family histories? Must one sacrifice chronology for clearer thematic relevance to the present, for example, on issues of globalization, identity, or humanity's relationship to the natural world?

This collection attempts to make sense of these and other questions. It offers ideas and examples of how to do throughout the semester what I apparently accomplished only in the last week. In particular, the essays deal collectively with what I've come to call, in the course of editing, the "personal and the present in world history." I thank the authors for shaping the collection in such a way.

In the first three essays, readers will find concrete assignments that give students far more active and creative roles in researching, understanding, and narrating world history than to

which they themselves may be accustomed. These essays provide innovative approaches to personalizing world history through public history, multimedia projects, and travel planning. David Dry's essay on "Making the Local History Connection" tackles the dually difficult task of integrating local history projects into both world history and distance learning courses. He argues that for teachers in the United States, the U.S. survey provides more of an opportunity to get students excited about the history of their own communities than does the chronological and geographical scale and scope of world history. Distance learning, Dry contends, only exacerbates this disconnect. However, because distance learning students often live and work in diverse communities and regions, the collective range of public history options can allow instructors to both connect individual students to their local histories and illuminate how world history can provide deeper context for those places. Dry offers a two part assignment in which students first locate, visit, and research a public history site in their community and second, write either an integrative essay that situates students' local historical sites within the broader arch of world history or a comparative essay in which students consider how people in other times and places created, used, and made meaning out of their own locales. For the second essay option, Dry recommends that students use the list of UNESCO World Heritage sites to begin to think comparatively.

Teresa Booker makes the case for collaborative multimedia projects to explore a variety of topics related to race, ethnicity, immigration, and social justice. Booker describes the progression of a semester-long project she has used in courses on ethnicity, African-American history, and peace and justice. Students begin by writing essays on topics that have included Civil Rights, community and ethnicity, the problem of genocide in post-colonial Africa, and diasporic identity. The second part of the project asks students to develop oral, local, personal, or family historical narratives, and then using Windows Movie Maker, create multimedia presentations. As Booker acknowledges, the assignment has yielded fruitful pedagogical results and revealed logistical problems as she seeks to engage students in both creative historical interpretation and practical team-building and multimedia skills.

In the 10,000 Miles Project, Erika Briesacher asks students to think creatively about how modern notions of tourism, travel, and travel planning can provide critical historical insight not simply into individual places and cultures of interest but into the ways in which historical actors experienced migration, dislocation, long-distance trade, religious pilgrimage and mission, and/or empire-building between and among those locations. Using Robert Strayer's *Ways of the World* and Charley Boorman and Ewan MacGregor's travel narrative *Long Way Down* as reference points, students select and map ten points of interest outside of their country of origin and then engage in historical research, using primarily peer-reviewed secondary literature, to connect their own travel plans to the historical journeys of actors ancient and recent. Briesacher's assignment combines historical research with a great deal of creativity, and instructors will likely find the 10,000 Miles Project quite adaptable to a variety of settings, including high school, first-year college, and advanced undergraduate courses.

## Special Section: Teaching and Learning the Personal and the Present in World History

The final four contributions offer narrative essays, case studies, and focused assignments and lessons on teaching a diverse array of contemporary issues that include Black Power's transnational fight for social and economic justice, Samuel Huntington's "Clash of Civilizations" theory and the politics of Orientalism in a post-9/11 world, two episodes in Mexican globalization and the case for context, and the role of visual culture in the formation of racial and national identities. Jerome Teelucksingh offers ways for world history instructors to teach Caribbean history outside of the common narrative of New World slavery. He claims that though historians have located Black Power's origins in the sixteenth century, its transnational appeal during the 1960s and 1970s can help students, particularly in the U.S. and Canada, make clearer connections among the processes of decolonization, Civil Rights, and neo-imperialism. Trinidadian and other Caribbean Black Power actors in the West Indies, the United States, Canada, and Britain challenged not only global segregated and racist social orders, but also protested the inequities of capitalism during a time of transition from formal empire to neoliberalism. Teelucksingh's essay offers a concrete way that teachers can connect current protests against the inherent inequalities of globalization to their more recent historical precedents in ways that will resonate with students. It offers points of departure for thinking about how political and social movements reflect both local and global conditions at once.

In "Teaching Global History Through Contemporary Issues," I describe the transition from the traditional two-semester history sequence to a one-semester, first-year experience course called the Roots of Contemporary Issues (RCI) currently underway at Washington State University. On one hand, the course raises a number of questions and concerns about sacrificing chronology and deep historical coverage. On another hand, it offers an example of the ways in which world history teachers might harness students' familiarity with current struggles and debates over climate change, global capitalism, gender and racial inequalities, possibilities for and challenges to democratic rule in the Middle East and North Africa, and an intractable conflict between Israel and Palestine. Furthermore, RCI's emphasis on information literacy and research skills and frequent small-group discussion privileges active learning. As an appendix, I offer a three-week RCI lesson plan that investigates Samuel Huntington's "clash of civilizations" theory at a time when the United States' military and economic interests remain deeply entrenched in a region undergoing dramatic political and social upheaval.

As a caution against making sweeping commonalities between past and present in the classroom, Richard Weiner's "Globalization, Past and Present," reminds us that despite

globalization's five-century career, context matters. Using Mexico as a case study in globalization, Weiner argues that though there are parallels between the Porfirian era (1876-1910) and the neoliberal era (1982-present), the two episodes in globalization differ in critical ways. Though Mexico's ruling class deemed global capitalism critical to Mexico's development and national sovereignty during both time periods, they would have disagreed on the state's role in forging global economic ties. Weiner argues that in particular, the seven-decade chasm separating these two periods, one of revolution, state building, and industrialization spurred neoliberalism's reactionary politics in the 1980s. One hundred years prior, the Porfirian considered a strong state critical to thwarting the soft imperial power of foreign multinationals, even as they courted such institutions to fuel Mexico's modernization. The final section of the essay considers the effects of globalization on three critical areas - industry, Indian society, and labor markets – in ways that provide teachers with concrete examples that underscore the nuance required for comparative histories of globalization.

In the collection's final essay, Sally Stanhope connects her own experience teaching at a school that serves undocumented immigrant students with the identity politics of New Spain. She demonstrates that her students are and *castas* were targets of social and economic organization along lines of ancestry, national origin, race, and physical appearance. The *casta* paintings that proliferated in eighteenth-century Spanish America provided the Spanish ruling class with visual evidence of their control over what other European imperial powers regarded by then as a backward, disorderly, and miscegenetic population in New Spain. That control, Stanhope argues, was only imaginary, and discussions that compare the purpose of *casta* paintings with the realities of social and economic mobility can help students of history become more critically aware of the importance of interpretation and meaning. Stanhope follows her essay with rich examples of *casta* paintings and detailed assignments designed to help students properly analyze and think critically about primary sources.

In large part, our collective mission as teachers is to teach about history and history-telling with the goal of helping students understand the past's relevance to themselves and the worlds in which they learn, work, travel, interact, make meaning, and create personal and collective identities. It is with this end in mind that these teacher-authors have graciously shared their own ideas, experiences, and expertise. I thank them for working with me, responding to feedback, and most of all for the impact that their contributions might have in all of our classrooms in ways big and small.



World History Association

## Special Section: Teaching and Learning the Personal and the Present in World History

### Making the Local History Connection: Community Colleges, World History, and Distance Education

David Dry

*Miami Dade College, Asheville-Buncombe Technical Community College*

Intrinsic to the mission of community college education is sense of service to the local community. History teachers can fulfill this mission by integrating local history into classroom discussion and course curriculum. Community-based learning prepares students to become productive members of the community by learning how its past informs its present. Indeed, the most likely place to find a course entirely devoted to local history is at a nearby community college, probably not at local high schools or a research university. When teaching American history, the historical connections of the local area to national narratives are often obvious, and they make for easy transitions and fruitful discussions; however, students often struggle to make similar connections in a World history survey course. For American students looking at the history of a distant place like India, there often seems to be a rift between that subject matter and the realities of the present, or the local. Thus, students feel no genuine link between the area where they live and the history they are studying. In addition students lacking the necessary skills to link their local communities with broader global historical trends may have difficulty making sense of the histories of their local communities as well.

Distance education courses often exacerbate these issues. They can isolate students and evoke a sense of disconnectedness from their instructor and peers in ways that students who attend physical classrooms might never experience. Furthermore, distance students are often unable to connect course content to their own communities. Distance education often organizes students who are not part of a single community into consortiums. While consortiums may bring students into virtual conversation with others of different backgrounds and perspectives, the designs of many distance-learning assignments do little to exploit this intrinsic advantage.

The following lesson plan attempts to connect the local and the global in a distance education format. It does so by asking students to examine local historical sites and place them within a world historical context. In doing so, it recovers the opportunity to engage with public history resources. The project consists of two assignments that should be completed toward the end of the course so students will already have sufficient understanding of general history to recognize the importance of local developments. However, instructors are encouraged to build in preliminary assignments that get students thinking about local public history options early in the session.

The first assignment asks students to create a multimedia presentation about the history of a local site of their choosing. Instructors should approve the sites students select (or provide a list of sites to students) to ensure they fit the chronological or thematic foci of the course. For example, if a student selected the Castillo de San Marcos, a 17<sup>th</sup> century Spanish fort located

in St. Augustine FL, they would visit the site, locate or ideally take their own pictures, obtain relevant literature and books, and answer the broad questions laid out in the handout (Appendix A). Students then create a multimedia presentation that integrates all of these resources together and post their presentation in the online course space. After all students post their presentations, students then respond to their peers' presentations with particular emphasis on comparing and contrasting the creation, function, and historical context of their peers' sites to their own.

The second part of the project consists of an essay in which students have two options (Appendix B). The first essay option requires students to write a thematic essay which puts their local site in the context of world history by looking at the historical events which took place there, local historical figures and cultural, economic, political, and/or environmental influences that shaped that history, and how it fits into the broader narrative of world history. In the case of the Castillo de San Marcos, a student might choose to examine its role as a site of European colonialism in the New World. Built to protect Spanish trade and possessions from the machinations of its colonial rivals, the fort's construction through coerced native labor also reveals Spanish oppression of the native population. Thus, students should be able to explain how local historical sites and the histories of their local communities have been and are connected to global movements and processes.

The second essay option asks students to write a comparative essay of their site and a site from a similar time period and with a similar function in an entirely different part of the world. Students will be asked to explain the differences and similarities between the two sites based on the historical developments and culture of the two areas. The list of UNESCO World Heritage Sites (<http://whc.unesco.org/en/list>) proves helpful in locating a comparable site.

In seeking to locate a site appropriate for comparison with the Castillo de San Marcos, a simple keyword search of "fort" in the list of UNESCO World Heritage Sites turns up a number of sites which fit the criteria. For example, a student might select the Mughal Empire's Red Fort at Agra, a red sandstone fortress near the Taj Mahal on which construction started in 1565 (the same year St. Augustine was founded) and continued well into the seventeenth century. By comparing the Castillo de San Marcos to this site, students will consider the needs of leaders in both societies to protect their interests from and intimidate rivals. In the case of the Castillo, leaders were less concerned with architectural grandeur than its practical functions as a defensive outpost. However, Agra stood as both a practical defensive structure and as an awe-inspiring artistic endeavor intended to reveal the clout of the leaders who ordered its construction. Students can also draw comparisons between the historical developments taking place in these two societies by noting the changing function of the forts in the 19<sup>th</sup> century. The Castillo continued as a vehicle of colonialism, serving as a prison for Native American leaders such as White Horse during the late 19<sup>th</sup> century Indian Wars in the trans-Mississippi West, and Agra served as an example of the contested nature of British imperial power, serving as a refuge for the British during the Sepoy rebellion of 1857. Through examining the history that took place

## **Special Section: Teaching and Learning the Personal and the Present in World History**

at these sites, students will learn to identify independently created commonalities in form, function, and historical role of their two sites. At the same time, they will become aware of the distinct differences that exist and how people, culture, geography, and historical events influence the development of the sites.

The first part of this project allows students to research their historical site and the local area, and by viewing and commenting on the projects of other students to make cross-regional connections and gain a broader understanding of what internal dynamics affected their own communities. The hope is that, students will come to understand the connections between this history and the realities they perceive daily. Additionally, this will make them “subject matter experts” on their individual sites, and prepare them to write one of the essays in the second part of the project.

The essay projects allow students to make global connections to what they have learned about their site and the local area, thereby helping them relate world history to their own lives and communities. Different sites may be better suited to one of the two prompts, so students should be encouraged to select the essay option that best fits the site they’ve selected. The first essay is best suited to sites which can be tied to world events or movements, while the second option works best with sites for which there is another site with a comparable function in a different area of the world, and from a similar time-period with which to compare and contrast.

This project has the potential to make world history tangible to students. Furthermore, by including this or a similar project in online world history courses, instructors can help distance-learning students make the big historical and global connections to their personal lives that we strive for with students in brick-and-mortar classrooms. Their own lives are indeed shaped by and are part of not only their local communities but also the global historical processes that created them. By integrating local history into discussions about world history, students can begin to see the interconnectivity of the world and the common characteristics expressed in myriad human societies. Moreover, by focusing on local history and a particular public history site, students can gain valuable skills in interpreting their own surroundings by thinking about them both globally and historically.

### **Appendix A**

Presentation instructions: Students will create a multimedia presentation on a historical site in their area. The history that the site interprets must relate to the course content and requires instructor approval. Students should research their site by locating books or articles, visiting the site, speaking with the people who oversee the site (if possible), taking or obtaining images, finding visuals, including relevant maps, and acquiring any other pertinent background information. Students must cite at least two sources at the end of their slides. At a minimum, the presentation should answer the following questions:

- Who created the site?
- When was the site created?

- What was the site used for?
- What are the important features of the site?
- In what ways has the site changed over time?

The presentation will be shared with the class in the “Local History Site” discussion forum. Students will post the presentation, comment on the presentations of at least two others, and respond to comments about their presentation. In commenting on the presentations of peers, students should compare and contrast, focusing on the developments that led to the site’s creation, its historical function(s), and context under which it was used. The rubric below lays out how students will be assessed:

#### **Creativity of presentation design: 10%**

- Use of color
- Use of different slides/transitions

#### **Quality of historical information: 60%**

- Inclusion of required background information
- Inclusion of map/images
- Minimum of two sources cited

#### **Student Response: 30%**

- Quality of responses to other presentations
- Quality of responses to those who comment on presentation
- Effectiveness of comparisons and contrasts

#### **Total: 100%**

### **Appendix B**

Essay instructions: Students will write a 500-word essay in which they place their local site within the context of world history. Students will have two options for the essay:

Option one: Write a thematic essay which puts the site in the context of world history by looking at its development, the people involved in its creation, the movements or cultural influences which had an effect on the site, and how it fits into the narrative of world history. Students can focus on any or all of these aspects. Students should compose one short paragraph summarizing the information in their presentation and then spend the rest of the time making global connections. Examples of “world” movements students may want to consider could include: imperialism, colonialism, religious movements, architectural movements, international commerce, industrialization, immigration, or intellectual movements.

Option Two: Write an essay that compares and contrasts your site with a site from a roughly similar time period and with a similar function, but from an entirely different part of the world. Students are encouraged to consult the list of the UNESCO World Heritage Sites at <http://whc.unesco.org/en/list> to assist in locating an appropriate site. In the essay, identify common patterns across cultures, as well as differences in form and use, and explain these differences/similarities based on the historical developments and culture of the two areas. Thus, students must not only be familiar with the selected sites as public history sites, but also with the historical development of those areas.

## **Special Section: Teaching and Learning the Personal and the Present in World History**

### **It Takes a Group to Make an Oral History Film: Using Windows Movie Maker**

Teresa Booker

*John Jay College of Criminal Justice,  
City University of New York*

#### *Introduction*

According to the Partnership for 21<sup>st</sup> Century Skills (an organization dedicated to promoting educational readiness in American students), “every aspect of our education system—pre-K-12, post-secondary and adult education...must be aligned to prepare citizens with the 21st century skills they need to compete.”<sup>1</sup> This is because “advanced economies, innovative industries and firms, and high-growth jobs require more educated workers with the ability to respond flexibly to complex problems, communicate effectively, manage information, work in teams and produce new knowledge.”<sup>2</sup> These statements are in keeping with my college’s goals to promote student learning with a motivating, educational environment that “includes stimulating and innovative teaching [in]...an attractive, challenging and well coordinated curriculum.”

At some point during or shortly after their four years as undergraduates, most students will be asked how well he or she works with others during their job, internship or graduate school interviews. In Spring 2010, I studied the Partnership for 21<sup>st</sup> Century Skills’ concept of information, communications and technology literacy to find new ways to teach multiple sections of three courses that I have taught over the last six years. In light of college goals to engage 100-level students in research, I set a personal goal to re-structure my culminating assignment to engage students through the use of technology and thereby enable them to reply confidently when asked sometime in the future: “Do you have any experience working on a team?” This essay describes a piloted collaborative project tested in several sections of three existing courses and that served as an example of innovative classroom pedagogy.

During Spring 2010, Fall 2010, and Spring 2011, I taught a total of ten classes. The classes—all of which included multiple sections (with the exception of one)—belonged to one of three courses: Ethnicity in America (EIA), The African American Experience (AAE) and Making Peace, Restoring Justice (MPRJ). The titles alone suggest that the course descriptions of each were different but, in hindsight, it is now clear that the one thing that they had in common was that they did pertain, in some way, to the creation of subordinate group statuses.

Not one for re-inventing a new wheel for each class or section, I required all students to write a short paper on a finite research experience and share their research experiences with others. Whereas the “sharing” was accomplished through traditional oral presentations in previous years, Spring 2010 marked my first attempt to require students to use Windows Movie Maker (WMM) as a means to communicate their ideas and also to collaborate as members of two-person and also four-to-five person teams for their midterm and final projects, respectively.

#### *About the Courses*

EIA is an introductory course that examines issues of race, ethnicity, discrimination and prejudice through the eyes and experiences of three minority groups: African-Americans, Latinos and Asians (although we briefly examined the experiences of Native-Americans, Italian-Americans, and others). The racial demographics of students enrolled in EIA tends to be composed roughly of 80% Caucasians, 10% Hispanics, 5% African or Caribbean Americans, and 5% Asians. Every section averaged the maximum of 40 students, and all sections were composed of students under 25 years old.

Similarly, the history course (AAE) was also an introductory course but one that looked at the history and experiences of African-Americans from slavery to the present. This course had two main purposes: to shed light on the major events that shaped the experiences of African-Americans and to explore the contributions of specific individuals in the areas of art, music and literature. Invariably, the racial composition of AAE is nearly the inverse of EIA: composed roughly of 80% African or Caribbean Americans, 15% Hispanics, 4% Caucasians and 1% Asians. Every section of AAE averaged 40 students, and 90% of all sections were composed only of students under 25 years old. Only on rare occasions were older students present.

Finally, the restorative justice course (MPRJ) was a second-year course. Only one section was taught in Fall 2010. It focused on examples of restorative justice from Africa and the Pacific Islands and explored how the African philosophy of “humanity towards others” influenced Africa’s notions of justice, community and suffering. The racial composition for this course was roughly 45% African or Caribbean Americans, 45% Hispanics and 10% other. The class had about 23 students, ages 18 to 25 years and two students between 30 and 50 years old. Based on ongoing classroom discussions in which nearly everyone participated, the great majority of EIA, AAE and MPRJ students worked full or part time and were from working class backgrounds.

#### *Part I: The Written Assignment*

This collaborative assignment was composed of two parts: a written paper and a group presentation. Regarding the former, I required students to write six to seven page papers on various topics, depending on their course.<sup>3</sup> In order to get students thinking about their projects, they were required to submit a 1-2 paragraph proposal identifying their reasons for choosing their paper topics and also a 1-2 page outline of their papers during Week 8. A draft of their research paper and their final paper were due during Weeks 13 and 14, respectively.

#### Ethnicity in America (EIA)

During the semester, EIA students systematically examined the conditions surrounding each group’s arrival to America as well as the economic, educational, political and housing discrimination they faced. Therefore, their written papers and group presentations were focused on the making of subordinate groups---particularly the push-pull factors that led to the immigration of many of their parents and grandparents. Specifically, students were required to tell their families’

## Special Section: Teaching and Learning the Personal and the Present in World History

immigration stories and to find out more about their pasts.

While “official” oral history projects typically use the latest recording devices to store data, no students in any classes (including AAE and MPRJ) were permitted to use direct subject audio or images. Therefore, as an exercise based on conversations between family members regarding stories that some students had heard several times before, EIA students nevertheless prepared questions and/or outlines based on what they knew of their family’s subgroup experiences. Although some students confessed in their papers that they had “winged” their interviews, many more indicated that they had taken the time to not only prepare questions but also to conduct some type of preliminary research using either their textbook or some other secondary source. Unbeknownst to them, students set about their goals much like other researchers who also focused on the immigrant experiences of their subjects and lives as members of subordinate groups. For example, as in articles by William Wilkinson and Ronald Skeldon, my students began with their own memories and then asked questions in search of little known or hidden facts. Like Wilma Mangabiera, they were able to penetrate their groups’ own Little Italies, Little Haitis, and Germantowns. But, unlike Suruchi Thapar-Björkert, they were not perceived as nosy outsiders.<sup>4</sup>

### The African American Experience (AAE)

During the semester, AAE students learned how political, social, and economic factors led to the creation of trans-Atlantic slaves (pre-cursors to formal colonization) and also how social institutions assisted the dominant group in creating and maintaining an African-American subordinate group within the United States. Students’ written papers and group presentations were designed to highlight the period that we would reach by the end of the semester, the 1950s-1960s. To that end, students were required to interview anyone, 60 years old or older, who lived through the 1950s or the 1960s in the United States or elsewhere. In that way, projects could include the experiences of any interviewee who was able to relate her/his own experiences of racial or ethnic discrimination to that of African Americans during the period.

Interestingly enough, although AAE students could interview *anyone* age sixty or older, many preferred to interview Americans--particularly African Americans. Some had conversations with family members but others spoke to co-workers, church members, acquaintances, and even total strangers. While many indicated that they prepared outlines and questions, a few admitted cutting corners by asking relatives to flip through chapters in their text as a way to jog certain memories about life as a member of a subordinate group or moments of segregation. More than a few people indicated that they had taken the time to talk with family members at “best” times, in special rooms, and while sitting on particular pieces of “comfortable” furniture. According to their papers, students asked basic as well as probing questions. They listened to their subjects, asked follow-up questions, looked for opportunities to ask deeper questions, and redirected subjects when they veered off topic. They felt empathy. They felt pride. AAE students were

unaware that their inquiry into the maintenance and consequences of societal subordination was not unlike Kayoko Yoshida’s when she asked Japanese subjects about their perceptions of an atomic bomb documentary, Pamela Sugiman’s comparison of Japanese-Canadians’ memories with “historical truth,” or Larry Griffin and Kenneth Bollen’s study of their subjects’ memories of the civil rights movement.<sup>5</sup>

### Making Peace, Restoring Justice (MPRJ)

During the semester, MPRJ students drew comparisons between western views of justice and African and African diasporic views of justice - particularly how tribal communities settle disputes. As a result, students were required to write papers and group presentations which focused on a particular country and which highlighted their conflict resolution practices. Papers on countries like Rwanda and Uganda focused on genocide. Since one-on-one interviews were neither appropriate nor possible for this assignment, students were only required to illustrate their papers using Windows Movie Maker.

Despite my assumption that this particular class would be limited in their abilities to conduct “true” oral histories like the EIA and AAE classes, several African MPRJ students used their own memories, family, and national histories to tell stories of genocide-related atrocities. Consequently, those were the presentations that impacted me the most because they applied course theories to examples in their own home countries and because they were somehow linked to an ethnic group that had experienced “recent” genocide. Although Diane Allen noted the importance of Palestinian memories to the identity of Palestinian refugees, Brickman’s Angolan refugees spoke of the torture they experienced in Namibia, and Larson described the stereotyping of Nicaraguans by the Costa Rican press, nothing was more poignant than knowing that one’s own student-colleagues had first- and second-hand knowledge of the types of disputes (and dispute mechanisms) that we had discussed.<sup>6</sup>

While EIA, AAE and MPRJ were all different, they demonstrated a range of subordinate group status experiences. Whether Italian, Irish, Dominican, African-American or Bosnian, all groups had firsthand knowledge to contribute to the topic. Moreover, the written component of the assignment required students, as future graduate students, law students, and job seekers to use little used or unknown network skills to accomplish their goals. To that end, students reported reaching out to family members, friends, the parents of boyfriends and girlfriends, current and former instructors and even a bar buddy in order to shed light on half-remembered stories and hidden past lives. They Skyped aunts and uncles, called grandparents with calling cards, interviewed co-workers, librarians, and even the resident of a senior citizens’ home.

### *Part I: The Group Presentations*

The second part of this assignment, the requirement to make a Windows Movie Maker (WMM) film, consisted of four steps as follows: introducing the project, creating practice presentations, working in small teams, and collaborating with a larger group. Since the process was the same for all courses,

## **Special Section: Teaching and Learning the Personal and the Present in World History**

I will only mention the steps and point out their value to undergraduates as they head off for job, internship, and graduate school interviews in the future.

### Step 1: Introducing the Project

Students were first introduced to WMM using YouTube clips at the beginning of the semester as part of the class overview. During an entire week of four class periods, a department of information technology technician gave a live WMM demonstration for each class, answered questions, and provided on-the-spot assistance in solving technical problems encountered by students who had already begun their projects. (In later semesters, I omitted this step because I became comfortable enough with the technology and could give the presentation to students.)

In law and graduate school, students must be able to capitalize on their own unique learning styles in order to perform their best and ultimately receive their degrees. Similarly, employers may require employees to lead a meeting or address a company problem. The introduction of the project allowed all students a chance to comprehend how WMM could transform traditional, old-fashioned paper presentations to another level. Hence, students immediately began locating their strengths and weaknesses in relation to the visual, auditory, and kinetic needs of the project.<sup>7</sup>

### Step 2: Creating Practice Presentations

Students were required to produce a one-minute presentation on their own neighborhoods by week six. This topic was chosen because it placed very few time or technical demands on the student and required no research. As a result, students were able to concentrate only on learning how to use the WMM software. The only formatting conditions for the first assignment was that the presentations were to be one minute long, contain a title slide, credit slide, and references to any images or music included in the WMM film. The typical film contained Google images of all of the students' respective New York boroughs, their block, and landmarks familiar to them. Once again, the purpose of the exercise was not for the task to tie into the broader themes of ethnic studies, the African American experience or restorative justice but to give students practice with and confidence in creating a short presentation.

Not surprisingly, the majority of EIA, AAE and MPRJ students are drawn to our specific 4-year college because of their desire to secure local, federal and even international law enforcement jobs. For instance, one of the most popular television shows of the day, CSI, has many incoming freshmen dreaming of becoming crime scene investigators. Like their CSI counterparts, my EIA, AAE and MPRJ students needed to have patience and to take a step-by step approach to their investigations.<sup>8</sup> Therefore, creating even one-minute presentations required students to take detailed notes about their environment, gather the evidence necessary to document their neighborhoods, and to become their own expert witnesses.<sup>9</sup>

### Step 3: Working in Small Teams

Students were required to form two-person teams and produce

two-minute presentations (on any one subject of their choosing) by week eight. The conditions for the formatting of the second film were identical to the first. However, films were required to appear as seamless as possible. Team films included individuals' hobbies, pets, hat collections, love of make-up, etc. The best films tended to be on those subjects that featured differences and, therefore, lent themselves to making comparisons.

Working in small groups required students to discuss how much time was going to be spent on certain tasks and how much preparation time would be needed to complete the task.<sup>10</sup> They presented their ideas to each other and undoubtedly negotiated what was and was not appropriate (and what would and would not be included) in their two-person films. Many of them mentioned having to revise their presentations more than once in order to get the finished sample "just right." In the real world, young adults must be able to discuss job and school expectations with their employers and professors, respectively. They must work with their colleagues, one-on-one and in small groups, to resolve anything from minor communication issues to major problems. They must be aware of their roles as members of staff meetings, law school study groups, or graduate school panels. Working in small teams accomplished this.

Although undergraduates may not typically seek to improve themselves via visits to computer and writing labs, many do look to internships as a way to supplement their college experience and boost their prospects with graduate schools, law schools, and employers. The two team groups in my classes unknowingly did exactly what would be expected of them in the real world: familiarize themselves with job and school requirements, work with others, and manage multiple roles. After all, students were not only responsible for their research paper and creating three films but staying current on their readings, taking notes, preparing for their tests, and managing work in their other classes.<sup>11</sup>

### Step 4: Collaborating with a Group

In the final step, students joined teams of four or five to collaborate on four-to-five minute presentations featuring the common theme of group members' individual papers. That is to say, after being assigned to teams that conducted oral histories on related topics (such as Irish Americans, segregation, the Black Power movement, and the Vietnam War), students were required to become knowledgeable enough of each other's finished papers in order to decide upon the content of their group's films. Allowing students to meet with their groups once in class accomplished this. Afterward students met outside of class or online. In addition to the formatting conditions stated above, final films were required to: 1) represent each person's contributions equally; 2) include a "sound track"; 3) contain transitions from frame to frame; and 4) indicate, in the closing credits, the tasks of each student. In order to avoid confidentiality issues, students were not allowed to include any images of their interviewees in their presentations. Many students solved the dilemma of integrating interviewees into the visual and audio aspects of the project by: 1) getting permission to use the interviewees' photographs; 2) using their own self images; or 3) by downloading images of the period from the Internet. The final

## Special Section: Teaching and Learning the Personal and the Present in World History

films were shown during the last two or three class periods of all of the courses.

At some point, both employees and students will be asked to share an idea or solve a problem. Graduate students certainly will be required to design and implement their own original research. In a small way, the final activity allowed these students to do what graduate students do: define their topic, explain its significance, and provide example after example to support their case. They designed their projects and developed their game plans outside as well as inside of class. Like any serious law or graduate student, they became expert managers of time and proceeded with their assignment without the constant reminder of their professor. While they did not “change advisors” (e.g. drop my course), some team members did ask for permission to remove inactive classmates (e.g. extreme absentees, people who had dropped out of school) from their teams. Similarly, as one would hope that all law and graduate students would do, at least two teams found time to “find balance” by including bloopers or “shout outs” to me in their closing credits.<sup>12</sup>

### (Endnotes)

1 While EIA, AAE and MPRJ all created films based on their research, they differed from the one-dimensional research of others. For instance, whereas Barsh used census data to help tell the story of Native Americans in the Puget Sound area,<sup>13</sup> my EIA students went beyond cumbersome and time-consuming census data and, instead, embedded family pictures, images of grandparents’ immigration papers, and other similar documents inside of their WMM projects. My AAE students similarly approached their tasks with interest and curiosity. And, despite the numerous oral histories documenting how Africans and African Americans felt about slavery,<sup>14</sup> participated in the Revolutionary War,<sup>15</sup> navigated Jim Crow,<sup>16</sup> and steered the Civil Rights Movement,<sup>17</sup> my AAE students did something that other studies do not: give their audiences a sense of the period by including period sounds, records, images, poster images, arrest photos, and heroes.

### Findings

WMM presentations produced several unexpected outcomes. On average, by the end of the semester, a typical class containing forty students will yield approximately ten percent of students either officially withdrawing from the course or with severely poor attendance. During the implementation of this activity, fewer than five students either withdrew or stopped coming to class. Moreover, students reported having friends and siblings to help on their films by recording original music or loaning music illustrative of the period. Because some students had experience using software programs that were similar to WMM, their presentations included special effects and visual treatments that resulted in unexpected but very pleasant surprises. However,

the simple use of WMM made even bigger surprises possible. For example, in a one-minute project, one student introduced his neighborhood with an aerial image from Google Earth. Another student used original poetry to narrate the film using rhyme. Still another student provided an original sound track that he and his brother created especially for the film.

As a whole, students helped each other problem solve whenever films did not run as expected. Classmates expressed genuine sympathy whenever their colleagues experienced vexing technical difficulties. After having prepared their own neighborhood films, many students developed film-making instincts and intuitively knew “immediately” when other students’ attempts to play their films would not be successful. While some students told others what they should click on in order to play their films from the comfort of their seats, others - primarily those on the front row - voluntarily left their seats in order to help people who were either confused or just unclear as to what they should do in order to get their film to play properly.

### Recommendations

While this exercise was interesting and educational for the students, there are a few points to keep in mind when planning to implement this activity:

- When possible, show 1-minute, 2-minute and 4-minute examples from excellent student work from the previous year while introducing the activities. Seeing previous examples will help to convince them that their future assignments are achievable.
- If students have access to computers on your campus (or in a lab), know which software they can access. The second time that I implemented this project, WMM was updated to WMM Live. This variation meant that students who created films at home using WMM Live were unable to play their films on campus where only WMM (and not WMM Live) was the loaded software on campus and on the classroom’s smart podiums. Students devised a way to get around the challenge, however, by sending their films to You Tube so that they could be accessed via the smart podium’s internet access.
- Where possible, provide students with a handout on how to create films using WMM. Posting them to Blackboard or a similar platform (or providing students with paper copies) will ensure that they will have access to a dependable set of instructions if they need it.
- While it is possible to include moving film images in WMM, students should know in advance that they might be unable to transfer videos created with their cell phones to WMM.

## Special Section: Teaching and Learning the Personal and the Present in World History

- While conducting their research – and especially when creating their films – students should be reminded that they should not record the physical images of their interviewees without permission. To be on the safe side, they should not be allowed to film or tape interviewees – even with verbal consent. This hard line should also prohibit the use of images with multiple individuals and especially minors, who cannot, by law, give their consent.
- To avoid illegalities, students should be made aware of copyright laws regarding the use of musical segments in their films.
- Be sure to specifically show students how to “publish” their final films so that they will save them to their own computers properly. It is not necessarily enough to tell them to “follow the directions.” The final step should be physically demonstrated.
- Students can prepare to display their work in class through a variety of ways. In the case of 1-minute and 2-minute presentations, I have found it helpful to write the headings “Facebook,” “You Tube,” “thumb drive,” “CD,” and “other” on the chalkboard. I then ask students to list their last names under the appropriate headings of each. Afterwards, I ask all the students under a certain heading to present their work in the order listed. In this way, there is no unnecessary jostling between medium types and presentations can flow more smoothly. I have found that by the time groups create their 4-minute presentations, they usually choose to show their video using Facebook or You Tube since there is at least one person in the group who has an account.
- Students should always have a presentation Plan B (e.g. thumb drive *and* e-mail or CD *and* Facebook account) just in case their first method of delivery fails to play properly.
- Consider creating a free Gmail account for yourself and asking students to send you copies of their films to show for future classes. While students are showing their films, take note of the exceptional ones so that examples worth keeping for the future are noted.
- Allow extra time for students to show their films. Even though, for instance, I had calculated that it would take forty minutes for twenty teams to show their 2-minute films (20 teams x 2 minutes), the overall time spent on the exercise was more. It does take some time for students to write their names on the board, travel to the podium, access their My Space accounts, try another password, access their second mode of delivery, answer questions, clap, etc...
- Insist that students are active listeners. I require all students to clap for each other including those who have technical difficulties (e.g. because they did not save their work correctly). I allowed students who experienced technical difficulties to present their work again during the next class period. As a variation, I have also distributed sheets with every student’s name and asked listeners to evaluate the films (on a scale of 1-5) based on required time lengths, overall organization of the content, the presence/appropriateness of music, and the presence of required film credits with image and audio citations. Although I did not allow student feedback to affect grades, I did give those who

provided feedback a few points towards their own films for participating.

Over the last year and a half, I implemented WMM projects in a total of ten courses. Due to my teaching load, in my heaviest semester, I viewed 104 individual, 52 two-person, and 26 four-to-five person team presentations alone. Admittedly, the major weakness in my current approach is the occasional inability to show films in a single period (due to student absences, technical mishaps, etc.). In the future, I plan to provide a way for students to download their 1- or 2- person films to an internet site dedicated only for class projects. In that way, I could then require students to conduct peer reviews of those films on their own time. This may mean asking presenters to submit one or two questions that an individual could only answer after viewing the film. A list of these questions would be used as a form of homework or extra credit activity towards their films.

### Conclusion

Students who participated in this activity reported that they learned more from interviewing their subjects than they could have by just reading their textbooks. In addition, because they benefited from hearing others’ presentations, the overall learning benefit was multiplied. Students also gained a unique way to present their research to others and learned how to utilize a software program that many did not know existed. Finally, they also gained experience planning, prioritizing, negotiating and collaborating --- face to face and virtually--- something that they are likely do more of in the 21<sup>st</sup> century.

### Notes:

- 1 Partnership for 21st Century Skills, 2009, 1.
- 2 Ibid., 6.
- 3 MPRJ students were assigned seven to ten page papers because they were enrolled in a 200-level course.
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## Special Section: Teaching and Learning the Personal and the Present in World History

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World History Association

### I Would Walk 10,000 Miles: Teaching World History through Travel Planning

Erika L. Briesacher  
*Kent State University*

Travel and cultural transmission permeate contemporary popular culture. *The Amazing Race*, Anthony Bourdain's *No Reservations*, programming featuring perennial traveler Rick Steves, and others like them provide unique ways to engage world history students by introducing them to new places and opening up new avenues of interest, research and understanding. In world history survey courses, the necessity to cover diverse historical material with global proportions challenges teachers to present the material in organized, interesting, and innovative ways to both majors and non-majors. Ulrike Brisson has emphasized the usefulness of travel narratives and literature as a way to engage students, contending that "travel writing can serve important pedagogical missions, namely creating a critical awareness for the constructiveness of representations of other people, their identities, and cultures."<sup>1</sup> Likewise, Valerie Hansen and Ken Curtis's *Voyages in World History* textbook also reveals the value and efficacy of travel in framing world history courses.<sup>2</sup> But it is through the lens of students' personal travel that the content in a survey course can truly open the world to students who may not see the relevance of history to their lives.

One of the challenges of a global or world history course is how best to choose and navigate thematic, chronological,

and geographic approaches to organizing content. Additionally, world history teachers must also take care to avoid Western or Eurocentric approaches that highlight events and experiences that brought Europeans, in particular, in contact with "others." As Theodore Rabb has argued, the impulse has often been to structure a course around topics and characteristics of the traditional Western Civilization course and sort of squeeze in "excursions into other cultures at appropriate moments: Confucianism and Buddhism when discussing Judaism and Christianity, Muslims at intervals when they encounter the West, pre-Columbian America when Columbus arrives, the great Asian civilizations soon thereafter, and Africa in connection with imperialism."<sup>3</sup> As a scholar of European history, I am well aware of my instinctual impulse to present world history in such a manner that reinforces rather than questions Eurocentrism.

With the introduction of communication systems that seem to make the world smaller, the challenge to teach world history is ever greater. On the one hand, debates about how to engage student interest in history courses often center on the use of media or film clips in the classroom.<sup>4</sup> In some ways, students have come to expect the use of media in classroom, not limited to but certainly including PowerPoint, images, and film. Popular culture provides a starting point for teachers to connect with students, whether one uses an example to reinforce or illustrate a point or to explain how popular culture got it wrong. But how does one combat the expectation that media will be used? Can one incorporate media while continuing to cultivate and teach writing skills? Teachers of history run the risk of appearing

## Special Section: Teaching and Learning the Personal and the Present in World History

“cookie cutter,” rendering once-fresh approaches involving media the norm. Additionally, the impulse can be to use media for media’s sake, rather than approaching it in an organized manner. The tension between the desire to use unexpected media to enliven history on the one hand and expose students to traditional documents and content on the other needed to be rectified. The solution, it turned out, was rooted in my own travels.

Following a research trip to Germany in summer 2010, I developed ways to teach global history while allowing students to determine in creative ways the parameters of the course content. What I envisioned was a “trip for the ages” that encompassed 10,000 miles and ten theoretical “stops” of cultural and historical import. Rather than rely on air travel to reach Europe, I decided to travel via ship, train, and auto to Lübeck, my end destination. Also, my sister and travel partner planned to undertake the Pilgrimage of St. James, walking from Saint-Jean-Pied-de-Port, France to Santiago de Compostela, Spain (though she ultimately joined me in Germany earlier than expected). The process of planning for these trips lent itself to the study of the history of these places and cultures. Knowing the historical and cultural background of each location—at which train station to transfer in Paris or which cathedrals were necessary to complete a pilgrim’s passport—inevitably tied past and present culture together, if only to make easier navigating a foreign country. By applying this experience to a classroom project with emphasis on understanding and navigating places outside of familiar geographic or cultural contexts, students can potentially take control of a major element of a survey course and develop their own relationship with the places they study. Another possibility, undertaken by several students, involved discussions with family members and tracing their own history or genealogy. Once personally and academically invested in a particular place, students might even decide to plan and take actual trips!

I first assigned the “10,000 Mile Project,” as it came to be known, in my Spring 2011 world history survey course. Using both Robert Strayer’s *Ways of the World with Sources* and the travel narrative *Long Way Down* by actors Charley Boorman and Ewan MacGregor, students investigated which cultural and historical contexts interested them most.<sup>5</sup> In addition, students constructed an overarching narrative that their trip illustrated; this narrative could be historical in nature or contemporary, following the model of *Long Way Down*. Examples that I provided included the Way of St. James, which was a cultural and often spiritual undertaking with roots in the Middle Ages, and my own journey across the Atlantic Ocean to Europe, which roughly followed the return migrations of European immigrants to the United States. Finally, I emphasized that their travel narratives should be original and reflect a personal engagement with both their journey and destination. The “10,000 Mile Project” provoked and provided a way into a variety of in-class discussion topics. Students linked, for example, historical figures’ preconceived notions of foreign cultures and places to their own, which opened the door to discuss historical bias and subjectivity. One major example is central to the account in *Long Way Down*: MacGregor and Boorman explicitly argue that they wanted to disprove their former contentions that Africa was an inherently dangerous place, and that camping along the road, for example, was basically

courting disaster. In fact, both actors undertook specialty training led by ex-military members in preparation for some perceived imminent conflict.<sup>6</sup> For smaller classes or discussion sections, the preparation of an in-class presentation of individual projects can not only provide a variety of subject materials to grapple with (as well as help students learn to answer questions within the framework of their specific project and support it with research) but give them a forum to show what they’ve learned. In larger classes, however, this is less feasible. Students were able to discuss in class how their projects related to topics we covered in lecture; their final product, however, was seen only by me in the form of a final paper.

The results from the first run of the assignment were encouraging and even inspiring. Students reacted more favorably to a project of this magnitude than to papers and other assignments drawn from documents or historical novels. They felt that they could focus on the topics they were most drawn to. Several students traced the paths of relatives. One, for example, followed his grandfather’s deployment with the United States Navy during World War II, tracing his path from Great Lakes Naval base in Illinois, to Europe and the Mediterranean, and finally to the Pacific Theatre and the Philippines. Other students utilized the framework of immigration to the United States for their project, highlighting not only their own family’s path but also those of other major ethnic groups that formed their childhood communities. In a very concrete way, this type of project underscored personal and genealogical history, causing one student to remark that they had never engaged in conversation with their relative about family history before.

Not all students conducted research about family history and related trends. Some traced the paths of historical events including the expansion of Alexander the Great’s empire and the migration trails of the Celts in early world history. In both of these cases, students focused on locations central to these historical groups. At the same time, they researched sites and groups who came in contact with their primary focus, demonstrating how cultural transmission occurs. One example was the aforementioned project following the Celts, discussing other European tribes who interacted with them in the early history of Europe. One memorable project focused on the philanthropic model presented in *Long Way Down* (particularly the actors’ obligations to UNICEF) and planned a trip that incorporated non-governmental organizations (NGOs) and other service groups to call attention to social issues throughout formerly colonized Latin America and Africa. This is an example of a non-historical narrative, though one that highlights the role history had in global development. Presented as a scrapbook, this student related pertinent information of the specific sites and focused on specific legacies of colonization. One example of this was the Church of San Francisco in Quito, Ecuador and the remains of Cantuna Chapel, demonstrating the Catholic legacy brought to Latin America by Spanish and Portuguese conquistadors. The project emphasized the cultural or hegemonic influences of the colonizer and highlighted concrete post-colonial and neo-colonial social and political issues.

The objectives of this project extend beyond simple exposure to world histories and world cultures. Travel

## Special Section: Teaching and Learning the Personal and the Present in World History

planning requires students to develop geographical and cultural frameworks that mirror thesis statements and roadmaps for traditional history essays. Students included maps to help them and their classmates think about their projects in geospatial terms.<sup>7</sup> In addition, students are required to conduct historical research using peer-reviewed secondary sources. Lastly, a project of this magnitude exposes students to extended writing and argumentation on the survey level, but gives them ownership over their topics. Few students, I found, struggled to reach the minimum ten pages.

Overall, students reacted favorably to this project and vocalized the desire to share their chosen trip with their classmates. While this presents challenges in larger classes, multimedia presentations that incorporate pictures, music, and video only add rich pedagogical dimensions to students' projects. Overall, the project promises to be flexible and adaptable to a variety of classroom or disciplinary contexts. Most importantly, this project allows students to connect with world history and elevate it beyond the pages of a document reader. It has the potential to make historical documents and scholarship new, inspiring, and interesting to students well after the fifteen-week semester is over.

**“10,000 Mile” Project  
Erika Briesacher  
History of Civilization II  
Spring 2011**

**Project Goals:**

The goal of this project is to get you thinking about how history and culture affect your lives outside of the classroom. Using Ewan McGregor and Charley Boorman's *Long Way Down: An Epic Journey by Motorcycle from Scotland to South Africa* as an example, you are to do several things.

1. Plan a trip that spans **at minimum** 10,000 miles.
2. Utilize transportation options **outside of** air travel. If one or more of the destinations you have chosen are reachable only through air, be sure to include (especially taking into account historical and cultural issues) **why** air travel is the only option.
3. Choose a minimum of **TEN** historical and/or cultural sites to “stop” at in your trip, clearly discussing how the sites fit into the overarching story you are telling.
4. Generally, exclude North America. The goal is to investigate places and cultures outside your comfort zone.
5. Include a map of your trip as well as the stops you make (refer to *Long Way Down* for examples).
6. CITE ANY OUTSIDE RESEARCH YOU UTILIZE (a works-cited page, footnotes or parenthetical references, and quotations if you use them). You MUST have at least ONE source per stop.

**Components:**

**1. DUE [APPROXIMATELY MID-SEMESTER]:** By this date, you will turn in a preliminary map, with your chosen stops clearly marked. You need at least **TEN** stops that can fit within a larger narrative. That being said, that narrative could simply be to span, as McGregor and Boorman do, the continent of Africa, discussing differences among nations and how history has shaped these myriad cultures. I suggest that you utilize themes we have addressed in class as your framework (e.g. trade, imperialism, etc.) In addition to the preliminary map, you will include a **2-3** page project overview in which you discuss the story you are telling, your chosen stops, and what you hope to accomplish in your project. Keep in mind, this is preliminary (basically a rough draft), and it is an opportunity for me to help you if you are struggling. This portion of the project will be worth 20% of the final project grade.

**2. DUE [APPROXIMATELY 2 WEEKS BEFORE FINALS]:** This is the final paper portion of your project. In this portion, you will discuss in depth your historical/cultural site stops, the scope of your project, any logistical information (such as, if you have to skip consecutive countries due to passport restrictions, as occurs in *Long Way Down*, etc.). It is in this paper where you will analyze your narrative historically, utilizing your research. For instance, address WHY certain policies (such as passport restrictions) are in place. **Final papers should be 10-15 pages in length;** essentially, you can devote at least a page to each site you choose, its history, and its cultural import, making sure to connect them using appropriate transitions.

**3. NOTE:** Choosing cultural/historical sites will require some outside research, in addition to familiarizing yourself with the nation-states you will be “visiting.” I strongly advise you to consult <http://memory.loc.gov/frd/cs/cshome.html> where you can search for nations by continent. This resource, produced by the United States Library of Congress, provides a good general overview from an authenticated source. In addition, if you want further examples of historical travel narratives, come see me for suggestions (some historical examples include narratives by Evelyn Waugh, Henry James, and Lawrence of Arabia).

**Notes:**

1 Ulrike Brisson, “Teaching Travel Writing: A Voyage of Exploration” in Eileen Groom, ed., *Methods for Teaching Travel Literature and Writing: Exploring the World and Self*, Travel Writing Across the Disciplines Series (New York: Peter Lang Publishers, 2005), 16.

2 Valerie Hansen and Kenneth R. Curtis, *Voyages in World History* (Boston: Wadsworth, 2010).

3 Theodore K. Rabb, “Teaching World History: Problems and Possibilities,” *Historically Speaking* 10, 1 (Feb. 2009), 14.

4 See Dan Lindley, “What I Learned Since I Stopped Worrying and Studied the Movie: A Teaching Guide to Stanley Kubrick’s *Dr. Strangelove*,” *Political Science & Politics* 34, 3

## Special Section: Teaching and Learning the Personal and the Present in World History

(Sept. 2001), 663-667; Jonathan Rees, "Teaching History with YouTube Revisited," *Perspectives in History*, 49, 4 (April 2011); David L. Rowe, "Preachers and Prophets: Using Film to Teach American Religious History," *Teaching Theology and Religion* 7, 4 (Oct. 2004), 230-237.

5 Ewan MacGregor and Charley Boorman, *Long Way Down: An Epic Journey by Motorcycle from Scotland to South Africa* (New York: Atria Books, 2009). This narrative chronicled the overland journey of two well-known celebrities, acting as a sequel to their first round-the-world trip *Long Way Round*. The

overall goal of the trip was to call attention to the beauty and conditions in Africa, representing UNICEF. NOTE: Students were only allowed to include North American locations in their project as a beginning or ending point; North American sites did not count toward their project requirements.

6 MacGregor and Boorman, *Long Way Down*, 74. This episode is also part of the accompanying miniseries that was shot in conjunction with the UNICEF trip.

7 Google Earth is also a possibility for this project, particularly if adapted to an online format.



### Teaching Black Power in Trinidad and Tobago in Global Context

Jerome Teelucksingh

*University of the West Indies, St. Augustine, Trinidad and Tobago*

In 2004, I taught an undergraduate course in Caribbean Studies at the Cipriani College of Labour and Co-operative Studies in Valsayn, Trinidad and Tobago. Of the forty or fifty enrolled in the course, most had a working knowledge of colonialism and slavery in a global context and their relationship to emancipation and Civil Rights movements in the United States. I chose Black Power in Trinidad and Tobago during the 1960s and 1970s as one of the main topics of the course, but rather than examine it in local or national terms, I sought to situate Black Power in Trinidad and Tobago in its proper place in world history.

The spread of Black Power in the English-speaking Caribbean contributed to the strengthening of West Indian regional ties and forged solidarity within Black and West Indian diasporas in Canada, the United States, and Britain against local and global colonialism and apartheid. While most students outside the Caribbean have a working familiarity with the American Civil Rights movement, Black Power figures like Bobby Seale, or decolonization in Africa or Asia, the role of Caribbean actors in this global movement often evades world history curricula, save Frantz Fanon's involvement in Algeria's revolution against France. The involvement of Trinidadians in the riot in Canada and personalities like Stokely Carmichael in the United States and Michael X in England shaped global Black Power movements. The responsive activism of Carmichael and Caribbean students in Canada proved a concerted effort to dismantle the institutions of segregation, colonialism and neo-colonialism. Reintroducing the Caribbean to discussions about Black Power allows students more fully to explore the transnational connections and commonalities among popular uprisings and political movements.

Continental and diasporic Africans and sought to alleviate the deep historical inequalities of slavery, racism, and imperialism. In the United States, Black Power activists responded to centuries

of racism and political exclusion. But America's Black Power participants also realized that their struggles were not confined to the United States but linked to global protests in newly yet struggling independent nations in Africa and the West Indies, where thousands were fighting against neo-imperialism and racism. Also, that turbulent era in the United States was marked by discontent with the state and a rejection of conventional politics. American Black Power activists found brethren in the Caribbean and elsewhere, and the pride and consciousness of persons of African descent in the United States manifested symbolically in the form of dashikis, Afro-hairyles, and clenched fists. These symbols would later be copied by protestors in Trinidad and Tobago during the 1970s.

The term Black Power has been subject to competing interpretations. On 17 June 1966, Stokely Carmichael, a member of the Student Non-Violent Coordinating Committee (SNCC) and later known by his adopted African name Kwame Toure, used the slogan "Black Power" at a rally in Mississippi.<sup>1</sup> Even at that early moment in the American Black Power movement, Carmichael's immigrant experience revealed the transnational nature of black protest. Carmichael was born in Trinidad in 1941 and migrated to United States in 1952. In an address eighteen years later to a crowd of five hundred Afro-West Indians and Afro-Americans at the Brooklyn Community Centre, Carmichael argued that Pan Africanism was the ideal political philosophy for Blacks throughout the world in their struggles against imperialism.<sup>2</sup> In 1970, Brinsley Samaroo, an Indo-Trinidadian and participant in Black Power described the movement as "part of a world-wide struggle for awareness among black people, [seeking] to revive our folklore which the British banned as primitive, our art and our customs brought by our forefathers...It is seeking to make the black man aware of himself and of his capacities and thus enable him to take his future in his own hands and not trust it to people who still doubt that any black man has talent."<sup>3</sup>

Though some West Indian colonies, including Trinidad and Tobago, won independence during the 1960s, Britain, France, and an emergent U.S. super power continued to exploit the region's natural resources through International Monetary Fund structural adjustment programs that forced nationalist governments to privatize lucrative natural resources, industries, and utilities. While independence represented the end of political ties to European countries, West Indians failed to achieve socio-economic freedom. Thus, one of the demands of Black

## Special Section: Teaching and Learning the Personal and the Present in World History

Power was the need for increased local and national ownership of companies operating in the Caribbean and the employment of Caribbean people as managers in these companies and not simply low-wage factory workers and field hands. The relatively high levels of poverty and unemployment made the alternatives espoused by Black Power more appealing to the masses.

Scholars of Africa, slavery, and the Atlantic World have located the origins of Black Power in the mid-1660s when enslaved Africans bravely resisted plantation slavery.<sup>4</sup> Revolts, escapes, and revolutions were all manifestations of Black Power as enslaved Africans boldly sought freedom and demanded human dignity.<sup>5</sup> A globally integrated economy emerged due to a flourishing international slave trade.<sup>6</sup> The rapidly diminishing indigenous West Indian population meant a search by the Spanish, and later British and French, for alternative labor forces. In the seventeenth century, slaves were imported from Africa to work in the Caribbean and while slavery was abolished in the British Caribbean in 1834, many emancipated slaves continued to work on sugar estates until the apprenticeship system was abolished on 1 August 1838. However, the end of slavery and apprenticeship in no way signaled the triumph of what we might consider an early manifestation of Black Power. Afro-Caribbean people continued to battle against oppressive social, political, cultural, religious and economic structures.

Caribbean Black Power was also influenced by the powerful ideology of Pan Africanism. Henry Sylvester Williams, an Afro-Trinidadian, was one of the founding fathers of Pan Africanism. In 1984, the seventh Pan African Conference honored this Trinidadian: “The Pan African Movement was initiated by a West Indian lawyer, Sylvester Williams, in 1900 to combat precisely this ownership of Africa and to declare the principle of ‘Africa for Africans.’”<sup>7</sup> Marcus Garvey, an Afro-Jamaican based in the United States, promoted Pan Africanism and race consciousness during the 1920s and 1930s via branches of the Universal Negro Improvement Association (UNIA) and his *Negro World*. During the 1940s, George Padmore and C.L.R. James, Afro-Trinidadians and Pan Africanists who spent time in the United States and England, also appreciated the importance of race consciousness and African identity and pride in liberating the entire African diaspora from imperial power regimes. Thus, the emergence of Black Power during the 1960s continued the global struggle to reclaim authority, power, identity and respect among displaced and colonized African people.

In the United States, Blacks faced segregation, discrimination, and violent racism in a society dominated by whites. During the 1950s and 1960s a network of vibrant organizations, each armed with charismatic leaders, demanded equality and justice. The Congress of Racial Equality (CORE), the Southern Christian Leadership Conference (SCLC), the Nation of Islam, the National Association of the Advancement of Colored People (NAACP), the Black Panthers, and the Montgomery Improvement Association (MIA) championed anti-racism. The movement reigned a commitment to social justice, and men and women sacrificed their jobs, time, and lives to ensure a better future for all Americans. Personalities including Malcolm X and Dr. Martin Luther King Jr. became the faces of the movement, even if their tactics differed.

King persisted in his efforts to make religion more relevant to the needs of the people. In his classic *Stride Toward Freedom*, he stressed the interrelationship of justice and love as he attempted to combine the spirit and ethic of Jesus with the political nonviolence of Mohandas Gandhi.<sup>8</sup> The Montgomery Bus boycotts of 1955 and 1956, sit-ins and Freedom Rides of 1960, 1961’s Albany protest against segregation and disenfranchisement, and the March on Washington in 1963 deeply influenced the reinvigoration of Black Power in Trinidad and Tobago, the broader Caribbean, and among people of African descent in the British Commonwealth.

In the United States, unionists belonging to the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) participated in the protests of the 1950s and 1960s, which impacted Black Power politics in Trinidad and Tobago. The connections between race and class here offer opportunities for students to realize the ways in which economic and social justice movements frequently coincided, particularly outside the United States, where anti-communism often divided the efforts of organized labor and Civil Rights. In 1967, the outspoken George Weekes, in his President General’s address to the Oilfields Workers’ Trade Union (OWTU) in San Fernando, South Trinidad, signaled an early warning to the politically marginalized governing People’s National Movement (PNM). He connected Black struggles in North America to racism in Trinidad and Tobago: “The Afro-Americans in the U.S.A., are struggling to the death for bread and freedom; therefore, it is necessary for us – the blacks in Trinidad and Tobago—to understand that the liberation of oppressed peoples of the world depends on the liberation of black people in the U.S.A. I hope the delegates are as happy as I am in knowing that Trinidad and Tobago has contributed a noble and famous son to the liberation struggle of the Afro-Americans in the person of Stokely Carmichael. He has given to them the slogan that has electrified the world: ‘BLACK POWER.’”<sup>9</sup>

In England, Trinidadians were also intensely involved in Black Power. In 1967, Tony Martin, Afro-Trinidadian president of the West Indian Society at Hull University in England, heard C.L.R. James delivering a fiery address at a Black Power meeting at Conway Hull and at Speakers’ Corner. Martin was impressed by this fellow Trinidadian’s oratorical skills and knowledge and arranged for James to speak at his university about the topic of “Black Power and the Third World.”<sup>10</sup> Another controversial Trinidadian involved in the Black Power movement in 1960s England was Michael de Freitas (also known as Abdul Malik or Michael X).<sup>11</sup> His notorious actions in England damaged the image of Black Power in the Caribbean and North America. Malik’s return to Trinidad and his involvement in criminal activity resulted in his imprisonment and execution in 1975.

With Stokely Carmichael in attendance, Dominican-born Roosevelt Douglas, chairman of the Congress of Black Writers in Montreal, invited C.L.R. James to address the Congress.<sup>12</sup> Walter Rodney, an Afro-Guyanese academic, also attended this historic event. Rodney was a supporter of Black Power and was genuinely concerned about the poor. Rodney argued that Caribbean poverty was a direct result of continued white control of banking, industry, commerce, and transportation, and that, without black ownership,

## Special Section: Teaching and Learning the Personal and the Present in World History

imperialism would persist even after independence. Jamaican Prime Minister Hugh Shearer used this opportunity to ban Rodney from returning to the Mona campus of The University of the West Indies (UWI). This ban mobilized the Guild of Undergraduates at UWI to close the campus. The students then marched to the prime minister's residence and parliament in Kingston. The ensuing clash with police resulted in the deaths of demonstrators. At the St. Augustine campus in Trinidad and Tobago, students also staged a protest to condemn Rodney's exile.

The involvement of Caribbean-born Blacks in Black Power in United States, Canada, and England was central in not only resisting neo-imperialism in the Caribbean, but their actions also had broader implications for decolonization in the Western Hemisphere. One of the early incidents was the Sir George Williams Computer Riot that began on 29 January 1969. Students protested the university's dismissive handling of reports of a racist professor, who discriminately failed black students at Sir George Williams University in Montreal, Canada (now Concordia University). The protest involved the occupation of the Computer Centre by two hundred West Indian students and one hundred white supporters. Students set the Centre ablaze when the police attacked them. In 1969, Reverend Harold Sitahal, an Indo-Trinidadian and ordained Presbyterian minister of Trinidad and Tobago, was then a postgraduate student at nearby McGill University. His sister-in-law Joy Sitahal provided food for the protestors at the Computer Centre while Rev. Sitahal attended lectures of U.S. Black Power activists speaking in Montreal.<sup>13</sup> The Sitahals participation in the movement indicates a broader religious appeal that moved beyond the Southern United States and SCLC and asks historians and students to rethink the seemingly oppositional relationship between King's non-violence and Black Power.

The 1969 riot was the beginning of the Black Power movement in Canada and immediately influenced the Black Power movement in Trinidad and Tobago. On 26 February 1969, students at the St. Augustine campus prevented Governor-General of Canada Roland Michener from entering UWI. On the first anniversary of the Sir George Williams incident, on 26 February 1970, the National Joint Action Committee (NJAC) and other discontented groups staged a massive demonstration in Port-of-Spain. This march was a sign of solidarity with the protesting students in Canada. Approximately two hundred protestors entered the Roman Catholic Church and staged a sit-in. They chanted 'Power, Power' and occupied the church for an hour. The demonstrators later occupied the Cathedral on Independence Square. There was a minor confrontation when marchers and police encountered each other at the Canadian High Commission in Port-of-Spain. Police also refused entry of protestors to the Royal Bank of Canada on Independence Square. The bank's branch at Park Street was also visited by demonstrators. Along Frederick Street, protestors with loudspeakers condemned businesses as 'exploiters.' Furthermore, the demonstrators made their presence felt in front the Furness Building and Trinidad Chamber of Commerce. Some businesses were afraid of the marchers and decided to close their doors. The historic march ended with a meeting in the evening at Woodford Square (dubbed the 'People's Parliament' by activists in 1970). Nine of the leaders of this historic march were arrested and faced charges including breach of peace and disturbing a place of

worship. Among the groups that condemned the harsh treatment by police and the manner of arrests in Port-of-Spain was the Black Studies Group (based at McGill University), which sent a cable to Trinidad condemning the police action and supporting the action of the demonstrators against "Canadian racist imperialism."<sup>14</sup>

The nine leaders of NJAC, who were arrested in February, were released on 4 March 1970. On that day began the first of several massive demonstrations. Thousands of activists from both rural and urban Black Power groups that included Afro Turf Limers (San Juan), African Unity Brothers (St. Ann's), Southern Liberation Movement (San Fernando) and the African Cultural Association (St. James) converged outside Parliament. They gave the traditional Black Power salute and shouted 'Power.' The demonstration then moved peacefully to Woodford Square where leaders gave speeches before demonstrators proceeded through the main streets of Port-of-Spain and then marched to 'Shanty Town,' one of Trinidad and Tobago's most impoverished slums.

The involvement of university students in revolutionary activity was not unique and remains a crucial component in discussing the similarities of mass movements in the United States and Trinidad and Tobago. In the USA, during the 1960s, the Student Non-Violent Coordinating Committee (SNCC) was a major force in demanding equality and voting rights for disenfranchised Blacks. Thousands of students participated in Civil Rights marches across the United States during the 1960s. College and secondary school students were involved in the Black Power protests in Trinidad and Tobago. Ayesha Mutope Johnson and Josanne Lennard, two female secondary school students, led the National Organization of Revolutionary Students (NORS) during the 1970s. Some women from this group later joined NJAC.

Furthermore, the protests against capitalism in Port-of-Spain were not isolated events. Rather, they reflected a broader global discontent with the imperial order that denied full citizenship and basic access to economic opportunity. In Trinidad and Tobago, the Black Panthers, patterned after their namesake in the United States, participated in the protests and demonstrations in Port-of-Spain. Alwin Primus, the local leader of the Black Panthers, produced a four-page "White Paper" demanding a development strategy dedicated to proper utilisation of land, labor, and capital. Among the Panthers' demands was the development of technical education, government payroll deductions, public savings plans, and national regulation of foreign investors.

There was an intellectual revolution occurring amidst these protests. Many young persons in Trinidad and Tobago became interested in discussing issues of democracy and party politics and reading books by radicals and intellectuals. The experience of political activism among Trinidad and Tobago's university and secondary students sparked a groundswell of intellectual radicalism and discourse. In the early 1970s, OWTU's *Vanguard* routinely printed excerpts from Walter Rodney's *Groundings with my Brothers* and C.L.R. James's *Party Politics in the West Indies*, quotations from Che Guevara, and an article on Frantz Fanon. This growing insistence on political alternatives and access to knowledge revealed that West Indians were acutely aware of Black Power's international appeal.

While specialists may find it difficult to ignore Black Power's global connections during the 1960s and 1970s, teachers

## Special Section: Teaching and Learning the Personal and the Present in World History

of world history must work a bit harder to make clear to students that in many ways, the Civil Rights and Black Power movements in the U.S. and decolonization movements in the British empire were actually parts of the same transnational processes. Black Power activists shared tactics and thought in global terms even though their end goals were local or national. By examining more closely the connections among Trinidadian, Canadian, and American Black Power activists, students can gain a better sense of how local and national movements are also global.

### Notes:

1 C.L.R. James argued that Black Power “is destined to become one of the great political slogans of our time.” See Stokely Carmichael and Ekwueme Michael Thelwell, *Ready for Revolution: The Life and Struggles of Stokely Carmichael (Kwame Ture)* (New York: Scribner, 2003), 580. In 1966, SNCC activist Willie Ricks used the slogan “black power for black people” in rallies. Ricks would shorten the term to ‘black power.’ See Jacqueline Johnson, *Stokely Carmichael: The Story of Black Power* (New Jersey: Silver Burdett Press, 1990), 83.

2 *Express*, May 4, 1970.

3 *The Vanguard*, March 21, 1970. Groups in Trinidad and Tobago that were involved in Black Power demonstrations did not adhere to a fixed notion of Black Power. Members of the National Joint Action Committee (NJAC), one of the major groups involved in the events of 1970, denied ever using the term ‘Black Power’ and claimed that a local newspaper the *Express*, invented the term. See James Millette, “NJAC’s Revisionism,” in Selwyn Ryan and Taimoon Stewart eds., *The Black Power Revolution 1970: A Retrospective* (St. Augustine, 1995), 353. William Riviere, a Lecturer at the University of the West Indies who was jailed for being part of Black Power, believed NJAC’s ideology was “more of race and colour and less of class.” See Bill Riviere, “Black Power NJAC and the 1970 Confrontation in the Caribbean: An Historical Interpretation,” Paper presented to the University of Pittsburgh seminar on The Black Man in the Caribbean, 1972.

4 Lawna E. Tapper, “Whatever Happened to Black Power?” [http://www.ricenpeas.com/docs/black\\_power.html](http://www.ricenpeas.com/docs/black_power.html);

Ron Rhodes “Black Theology, Black Power, and the Black Experience,” <http://www.assatashakur.org/forum/judaic-christian/2842-black-theology-black-power-black-experience.html>; “Black Nationalism,” [http://www.nethelper.com/article/Black\\_nationalism](http://www.nethelper.com/article/Black_nationalism) (accessed on 19 January 2012).

5 See James H. Sweet, *Recreating Africa: Culture, Kinship, and Religion in the African-Portuguese World, 1441-1770* (Chapel Hill: University of North Carolina Press, 2003); Ira Berlin, *Many Thousands Gone: The First Two Centuries of Slavery in North America* (Cambridge, M.A.: The Belknap Press of Harvard University, 1998); Robin Blackburn, *The Overthrow of Colonial Slavery, 1776-1848* (New York: Verso, 1988).

6 Robert Harms, “Early Globalization and the Slave Trade,” YaleGlobal <http://www.yaleglobal.yale.edu/article> (accessed on 5 September 2007).

7 This notice was dated January 4, 1983. CLR James Collection, The University of the West Indies, St. Augustine, Trinidad and Tobago, West Indies.

8 Martin Luther King. *Stride Toward Freedom: The Montgomery Story* (New York, 1958), 96-97.

9 *The Vanguard*, December 9, 1967.

10 Handwritten note from Tony Martin (at Acton) to CLR James, 15 September 1967. James replied to Martin 10 October 1967; Note from Martin to James informing him of the topic, 17 October 1967. CLR James Collection, The University of the West Indies, St. Augustine, Trinidad and Tobago, West Indies.

11 For more information see James Sharp, *The Life and Death of Michael X* (Waterford: Uni Books, 1981), Michael Abdul Malik, *From Michael de Freitas to Michael X* (London: Andre Deutsch, 1968); Derek Humphry and David Tindall, *False Messiah: The Story of Michael X* (London: Hart-Davis, MacGibbon, 1977).

12 He was popularly known as ‘Rosie’ and would later become prime minister of Dominica. He was a Socialist who had close ties with Labour and Socialist political parties in Europe.

13 Author interview with Harold Sitahal, Balmain, Trinidad and Tobago, February 6, 2010.

14 *Express*, March 2, 1970.



World History Association

## Special Section: Teaching and Learning the Personal and the Present in World History

### Teaching Global History through Contemporary Issues

Clif Stratton  
*Washington State University*

During the 2011 Spring semester, the University College at Washington State University asked members of the World Civilizations committee, currently housed in the Department of History, to design a new course that approaches the past from the vantage point of the present and allows students to practice information literacy skills. This request came as part of a university-wide transformation of the general education requirements (now called University CCommon REquirements, or UCORE) implemented last academic year and scheduled for completion by Fall 2013. During the 2012-2013 academic year, approximately four thousand first-year students will take a new one-semester, three-credit course called the Roots of Contemporary Issues (RCI). This first-year experience course will replace the current two-semester, six-credit requirements of World Civilizations I and II.<sup>1</sup> A sub-committee of five that has included Ken Faunce (interim director, World Civilizations program), Jesse Spohnholz (future director of the RCI program), Heather Streets-Salter (now director of the World History program at Northeastern University), Candice Goucher (WSU-Vancouver campus), and myself began designing RCI during the 2011 summer session and finalized the pilot draft just last December. As this goes to press, I am halfway through the initial test-run of RCI with just over five hundred students across four sections of World Civ II.

The Roots of Contemporary Issues presumes that the world has grown increasingly interconnected and complex – descriptions with which many first-year students will certainly agree. But students may not yet have the tools to understand why and how it has become so. In order to make sense of the complexity, RCI focuses on five major themes and their historical roots: humans and the environment, “our shrinking world,” inequality, diverse ways of thinking, and the roots of contemporary conflicts. In a fifteen-week semester, instructors cover all five themes, allotting approximately three weeks for each, with flexibility for syllabus introductions and final conclusions.

By covering these themes in the order described above, the course creates a narrative arch that starts with the broadest scope of humanity’s relationship to the planet and, by the end of the semester, introduces students to very specific contemporary human conflicts. RCI moves from the elemental level (humans and the environment) to big changes over time, specifically increased interconnectedness (“our shrinking world”), to how those changes can and have led to myriad inequalities, to how people understand both real and perceived differences (diverse ways of thinking), to how those inequalities and differences have led to past and present political, military, and social conflicts.<sup>2</sup> The committee initially struggled with how to reconcile the focus on contemporary issues and information literacy skills with a loss of broad world historical coverage and chronology, but after conceptualizing the initial pilot course, we decided that we will revisit our uneasiness only after the pilot run and make any

necessary revisions.

After settling on these themes, each member of the design committee took one theme and developed three-week lesson plans for two specific contemporary issues that relate to that theme. Instructors then have the opportunity to choose which issue they teach under the related theme. Ken Faunce designed three-week lesson plans for the issues of climate change and global water crisis (humans and the environment). Heather Streets-Salter developed globalization and global pandemics for “our shrinking world.” Candice Goucher created racial and gender inequality lessons for the roots of inequality. I contributed clashing civilizations (see Appendix A – an example of the issue submission form the committee used to standardize lesson plans) and economic ideologies for diverse ways of thinking. Jesse Spohnholz created conflict issues around the genocide in Darfur and the Israeli-Palestinian conflict. In order for the course content to remain current, we plan to implement both revision and submission processes so that we both revise or remove issues that no longer fit the mold of “contemporary” and attract new ideas from current and potential course instructors. We intend for RCI to remain highly organic in its content and pedagogical possibilities. The ten issues outlined above represent the inaugural class, and five of them (climate change, globalization, race, clashing civilizations, and Darfur) are part of my pilot this semester.

While the primary content goals of RCI are to promote increased historical literacy in order to understand current global issues, it also seeks to develop students’ information literacy as well. To meet this goal, the course employs two strategies. First, each theme highlights specific kinds of sources, and the assignments, including online discussion posts, in-class discussions, and end-of-theme essays ask students to work with certain types of sources in critical ways. For example, on the first day of the climate change issue, students read and respond to current newspaper and magazine articles that address climate change, and they pay particular attention to the ways in which climate change has become such a politically divisive issue. Issues that fall under the “our shrinking world” theme ask students to use peer-reviewed articles found in both journals and edited collections, again paying attention to argument and the possibilities of bias or political agenda (globalization really brought this to light). The inequality theme introduces students specifically to primary sources and the ways in which they differ from secondary literature. The theme of diverse ways of thinking continues this discussion about secondary literature, and the final assignment for the theme calls on students to locate book reviews of the issues’ chosen text and analyze the review in relation to the book itself (see how this works for clashing civilizations in Appendix A). The roots of contemporary conflicts theme serves as a forum where students integrate all of these sources into their understanding of the historical nature of current conflicts.

Second, RCI includes a series of research assignments that culminate in a final paper on the historical roots of a contemporary issue selected by individual students. In December, the committee came to Corey Johnson, head of library instruction for Holland-Terrell Library on the Pullman campus, with ideas about a series of online research assignments that students

## Special Section: Teaching and Learning the Personal and the Present in World History

would complete to prepare to write a five-to-seven page research paper on an issue of their own choosing. With input from the committee, Johnson created a five-part assignment that requires students to use the library's online catalog and databases to locate the same kinds of sources associated with each course theme, but that further students' individual research projects. Students complete one part of the library research assignment during each of the three-week themes, so that instructors can make clear the connections between the type of sources used in class and those that students locate on their own. Not only do students learn how to locate contemporary and historical sources using scholarly databases and gain an understanding of the differences between, for example, newspaper articles and peer-reviewed journal articles, but they are also asked to describe both how the sources they have chosen provide historical context for their chosen contemporary issue and how their contemporary issue connects to one or more of the themes of the course. Once students complete a component, instructors and teaching assistants provide feedback to students before moving on the next phase. So far, the pilot of this assignment has revealed a range of student abilities in using library resources, distinguishing among different kinds of sources, and thinking historically about the issues they have selected. Though the pilot is not yet complete, we envision decreasing the amount of reading and number of discussion posts related to each specific issue so that students spend more time researching, writing, and receiving feedback about their chosen projects during the course of the semester. Ideally, students develop a working thesis early on and, with instructor and teaching assistant guidance, revise their arguments based on their ongoing research.

Roots of Contemporary Issues does not presume to provide comprehensive historical coverage. It is not intended simply to replace World Civilizations II, and pre-modernists will find its present iteration lacking deep chronological coverage and balance in many spots. Most issues also use a rather broad brush to paint pictures of the past and of historical processes. Conflicts issues above all others provide opportunities for more detailed case studies. The design committee, which consists primarily of world historians, struggled with RCI's identity in light of these shortcomings. But like all survey courses, it employs selected themes, processes, and events. Furthermore, RCI stresses information literacy, and in doing so seeks to liberate students from the pages of textbooks and introduce them to the task of historical research, a skill that will help them in their other college coursework. Our lesson plans (see example in Appendix A) reflect our desire to create an active learning environment in which students regularly discuss and compare different kinds of contemporary and historical sources. We hope that RCI in both its current and future forms help students unpack a range of contemporary global issues that impact their lives in ways big and small, immediate and eventual, obvious and obscure.

### Appendix A

#### Roots of Contemporary Issues Submission Form.

##### Theme Title: "Diverse Ways of Thinking"

While the theme of "Roots of Inequality" is about how

an increasingly connected world has historically created socio-economic disparities along lines of gender and/or race, "Diverse Ways of Thinking" seeks to help students expose the historical roots of how people think about, order, and make sense of that increasingly connected or "shrinking" world and the patterns of disparity that have emerged. This task is important because all individuals develop their own sense of how societies - either their own or someone else's - ought to look and function. These visions stem from varied presumptions people harbor about themselves or others, mental frameworks that suggest right and wrong ways of thinking and acting, and competing visions of world political and economic order. Ultimately, the goal of "Diverse Ways of Thinking" is to understand the historical nature of the ideological foundations that color current global political, economic, and social tensions.

The learning goals are centered on teaching skills that students should be developing in their first year of college. Those include understanding multiple perspectives; critical and creative thinking; information literacy; written and oral communication; and depth, breadth, and integration of learning. The issues should allow global coverage and, if at all appropriate, integrate modern and premodern histories. Issues should also integrate the contributions of multiple disciplines, not just history.

##### Issue Title: Clashing Civilizations?

**Primary Question/Hook:** Is there a fundamental clash between the West and the Islamic World?

##### Rationale for Issue:

After the collapse of the Soviet Union and the bi-polar world order that had existed since 1945, a Harvard political scientist posed a question: is there a clash of civilizations between Islam and the West? Samuel Huntington argued that the next phase of global politics would be colored by conflicts among distinctive civilizations. Specifically, the September 11<sup>th</sup> attacks, two subsequent wars waged by the United States and its allies in the Middle East, greater media exposure of Islamic (and sometimes Christian) fundamentalism, nuclear proliferation, popular and democratic uprisings against authoritarian Middle Eastern and North African regimes (the 'Arab Spring'), a bid for U.N. recognition of Palestinian statehood met with staunch opposition by Israel and the U.S., and the provocative politics of nuclear armament between Iran on one hand and the United States and Israel on the other have revived Huntington's question numerous times over the last ten years. The issue of Clashing Civilizations asks students to examine the historical contexts in which the Western and Arab/Islamic worlds have connected, with particular attention to the cultural geographies of the "West" (Occident) and the "Orient" (East), modern European/American imperialism in the Middle East, and the legacies of the medieval crusades.

##### Justification of Issue Alignment with the UCORE Learning Goals:

These lessons align with the following UCORE Learning Goals: Critical and Creative Thinking, Information Literacy, Communication, Diversity, and Depth, Breadth and Integration of Learning.

## Special Section: Teaching and Learning the Personal and the Present in World History

*Critical and Creative Thinking:* This issue requires students to understand the historical realities behind a debate that has played out in our media since the end of the Cold War: whether or not there exists a fundamental clash among civilizations – with particular attention to conflicts between the West and the Islamic and Arab worlds. Students will use historical evidence and the theories of Edward Said to, if not challenge, at least qualify this proposition. It will ask students to rethink and be critical of the American media's coverage of events in the Arab and Islamic worlds and to think about how Western views of the people there often do not match the reality on the ground.

*Information Literacy:* Students will be asked to use WSU library resources to identify secondary sources that deal with the clash between the West and the Arab/Muslim Worlds. Specifically, students will analyze one book review of the main text assigned for this issue, analyze the scholarly conversation at hand, and situate what they have found into the narrative of clashing civilizations. Students will also complete part four of RCI's library research assignment. They will locate two additional secondary sources for their research projects, including at least one scholarly monograph.

*Communication:* This issue asks students to think, talk, and write about contentious political issues, but to do so in an organized way that demonstrates the use of evidence and reason and an appreciation for historical context and diverse worldviews. Students will have opportunities to hone both writing and speaking skills.

*Diversity:* "Clashing Civilizations" seeks to illuminate how people in the West understand the Arab and Islamic worlds and by extension, themselves. It asks students to confront racist and ethnocentric stereotypes and the historical imperial structures that rely on and perpetuate them. Students will be able to see themselves in relation to others in ways that acknowledge historical differences while attempting to foster mutual respect and real understanding of those differences. Clashing Civilizations prepares students to confront the ways in which preconceived ideas and perceptions can sometimes have disastrous consequences. Students engaged with this issue will have the ability to dispel such perceptions and seek accuracy and nuance in how they understand people that are different from them. This will have repercussions in their personal, professional, and civic lives.

*Depth, Breadth, and Integration of Learning:* Clashing Civilizations achieves depth by asking students to consider whether or not the medieval crusades play a role in the current tensions between the West and the Arab and Muslim Worlds. It achieves breadth by introducing students to the myriad iterations of Islam and to culturally constructed ideas about otherness. It achieves integration by combining historical analysis with the disciplines of political science (specifically Huntington), literature (specifically Said), geography, journalism and media studies, and religious studies.

### Learning Outcomes:

1. Students should be able to identify the historical roots of culturally constructed concepts of Occident and Orient, or West and East, and relate these terms to their spatial geography.

How assessed: Readings have been selected to explore how members of "civilizations" intellectually construct ideas about other "civilizations." Student comprehension and critical thinking will be assessed before every class period through online reading responses.

2. Students will learn to see the ways that mainstream media content and coverage shape how members of their own society perceive others.

How assessed: Students will be asked to use WSU library resources to identify recent media content that address the relationship between the West and the Arab/Muslim Worlds. They will then integrate the content that they have identified and analyzed into their writing assignments and class discussion and to situate what they've found into the narrative of "clashing civilizations."

3. Students will learn how historical actors and policies shape how members of other societies view students' own society.

How assessed: Readings and in-class discussions explore the historical roots of the current crisis of U.S. and European foreign policy in the Muslim and Arab worlds. Student comprehension and critical thinking will be assessed before every class period through online reading responses.

4. Students should be able to communicate to the instructor, the teaching assistant, and their peers the distinction between essentialist claims about cultures and historical explanations for difference.

How assessed: Small group and large group discussions ask students to actively engage the ideas of their peers, the teaching assistant, the instructor, and the readings.

5. Students should be able to compare diverging arguments put forth by authors in secondary sources and realize that history is a process of interpretation and reinterpretation.

How assessed: Articles chosen for lesson one reveal two scholars in conversation with each other about the same topic. Reading post asks students to summarize the second author's response to the arguments put forth by the first author. Book review assignment asks students to analyze one scholar's response to another.

### Recommended Background Readings and Preparation for Instructors:

Edward Said, *Orientalism* (New York: Vintage, 1978), 1-28. Introduction to the groundbreaking critique of Western thought about the Arab world. It is vital for instructors to familiarize themselves with Said's basic thesis and methodologies in order to convey to students that while history and current geopolitics certainly bear out conflict, to consider the clash as something that is fundamental and unchanging ignores historical reality.

## Special Section: Teaching and Learning the Personal and the Present in World History

Martin Lewis and Kären Wigen. *The Myth of Continents: A Critique of Metageography* (Berkeley: University of California Press, 1997), 47-103. Lewis and Wigen contend that the ways in which we categorize and divide the world into “civilizations,” “capitalist” and “communist,” or “first” and “third” worlds are more so intellectual constructions that mask similarities for the purposes of drawing distinctions and highlighting difference. Since this issue asks students to think critically about the oversimplification of Islam in the American (and Western) media, instructors should attempt to convey to them that the common vocabulary that we use to talk about the world’s people in relation to one another has the potential to exacerbate differences and exaggerate fundamental conflicts that are far more complex.

Amin Saikal, *Islam and the West: Conflict or Cooperation?* (New York: Palgrave Macmillan, 2003), 1-41. Short monograph that addresses the fundamental question students will attempt to answer in this issue. Saikal warns against over simplifying the clash of civilizations and that political decisions, economics, and history complicate Huntington’s assertions.

### Week by Week Plan for Course Activities, Assignments, and Readings:

**Week Ten:** Is there a fundamental clash between the West and the Islamic World? AND Connecting and disconnecting the War on Terror and the Medieval Crusades

**Lesson One:** What is the theory of Clashing Civilizations?

#### In class:

15 min. Warm-up focused writing and discussion. Ask students to write at least three characteristics of Islam and its adherents and three characteristics of Westerners or Western culture. Then discuss. Ask them to recall where they might have gotten that information. Call on students (taking care to include students who do not voluntarily participate) and generate their responses on the board.

25 min. Short lecture and interactive discussion of Huntington’s “Clash of Civilizations?”: What is the clash of civilizations theory? Who put it forth and when? Why might this theory have emerged when it did? Main points that need to be illuminated either by students or instructor:

- That Huntington’s thesis emerges after a 45-year standoff between two global superpowers.
- That these superpowers heralded their own economic ideologies as the primary ways of organizing the world.
- That the international policies of both the U.S. and Soviets during the Cold War were often extremely disruptive to the cultural traditions of the societies in which they interceded (more on this in week three).

15 min. Watch: 1998 Interview with Osama bin Laden. <http://www.youtube.com/watch?v=UnhJwxYsomw&feature=related> (6:18). Discuss: What are Osama bin Laden’s demands? Did he, as the narrator suggests, declare war on the United States? Does he identify a fundamental clash between the West and the Muslim

world? Why or why not? What were his reasons were for going to war with the United States? (3-day week schedules save this for Wednesday).

20 min. Small group discussion: Is there a fundamental clash between the West and Arab/Muslim worlds? Instructor or students generate list of responses on the board (This discussion should be saved for Wednesday in a 3-day week schedule).

#### Reading (to be completed the evening before class):

Huntington, Samuel. “The Clash of Civilizations?” *Foreign Affairs* 72, 3 (Summer 1993): 22-49.

Saikel, Amin. “September 11 and its Aftermath” in *Islam and the West: Conflict or Cooperation?* New York: Palgrave Macmillan, 2003, 6-23.

#### Assignment (to be completed the evening before class):

Post to a discussion thread. After reading Samuel Huntington’s article, what is the clash of civilizations theory? Summarize Huntington’s main points. In “September 11 and its Aftermath,” Amin Saikel critiques Huntington’s clash of civilizations theory. What is Saikel’s primary critique? Which author do you agree with? Why or why not? Respond to another’s post.

**Lesson Two:** What are the historical origins and developments of Islam?

#### In class

10 min. This lesson will open with a discussion that seeks to uncover what students already know or think they already know about Islam: What do you know about the Middle East? The Arab world? Islam? Instructors should ask them to refer to the lists they developed during the previous class period. Generate a list of student responses on the board.

15 min. Primary Source exercise. Hand out passages from the Qur’an (passages compiled in activities folder). Give students 2-3 minutes to read and take notes. Instructor may have students work in groups.

Then ask: What does the Qur’an say about Jews and Christians? According to the Qur’an, how should Muslims respond to aggression? How might we describe the nature of Islam based on these passages from its holy book?

25 min. The lesson then moves to an interactive lecture with PowerPoint presentation to provide students with the lay of the land: Islam’s historical origins and role in world history from Muhammad through the fall of the Mongol empire. This is not meant to be comprehensive but should highlight the expansion of Islam and the various ways in which people interpreted it.

- Chronology should only provide a framework for understanding the wide appeal of Islam throughout Afro-Eurasia. Show *Islam: Empire of Faith*, which portrays

## Special Section: Teaching and Learning the Personal and the Present in World History

Islam's earliest expansion not as a brutal conquest, but one of universal appeal, growth of the state, and technological advancement. After showing this clip, ask students: how did the earliest Muslims spread their message? Was it through violence, non-violence, or both? Ask students to consider the source.

- Presentation should reveal Islam's connections to Judaism and Christianity as religions of the Book. Instructors should make very clear that despite the presence of distinct texts within each of these faiths, they share common historical grounding and that religions themselves are historical.<sup>3</sup> That is, they are belief structures that change over time. They are not static.
- Presentation should allow students to understand Islam as a faith that can include a great deal of flexibility, adaptation, interpretation, and change. Instructors should draw parallels between diversity within Islam (Wahabbism<sup>4</sup> and Sufism<sup>5</sup>) and diversity within Christianity (Ethiopian Christians<sup>6</sup> and evangelicals<sup>7</sup>).
- Presentation should also indicate that while Islam originated on the Arabian peninsula its spread beyond Arabia to central Asia,<sup>8</sup> sub-Saharan Africa,<sup>9</sup> and Southeast Asia<sup>10</sup> means that people living there developed their own interpretations of Islam.
- Students should come away not with visions of a monolith, but with concrete evidence of Islam's complexities.

25 min. Discussion of assigned readings should reinforce this view. Assign each group of 4-5 one of the three readings. Allow them to discuss for 5-7 minutes (they have already read all three). Groups provide descriptive responses to the following questions (generate on the board):

Reading 1. Briefly describe at least three examples of the Qur'an's mythic origins.

Reading 2. Describe the three stages of Islam in West Africa. In which stage do you notice changes in Islam and what were the changes?

Reading 3. How did Central Asians adapt Islam to their own cultural traditions?

All groups: These sources are about adaptation and cultural borrowing. What would Samuel Huntington say about this? Would he see Islam in this way, based on what you know about his clashing civilizations theory?

### **Reading (to be completed the evening before class):**

Tim Callahan, "The Mythic Origins of the Qur'an" *Skeptic Magazine* 16,3 (2001), 14-21.

The Spread of Islam in West Africa. [http://spice.stanford.edu/docs/the\\_spread\\_of\\_islam\\_in\\_west\\_africaContainment\\_mixing\\_and\\_reform\\_from\\_the\\_eighth\\_to\\_the\\_twentieth\\_century/](http://spice.stanford.edu/docs/the_spread_of_islam_in_west_africaContainment_mixing_and_reform_from_the_eighth_to_the_twentieth_century/).

Xinru Liu, "A Silk Road Legacy: The Spread of Buddhism and Islam" *Journal of World History* 22, 1 (2011), 73-81.

### **Assignment (to be completed the evening before class):**

Post to a discussion thread on Angel (Washington State University's Learning Management System). The readings for today are secondary sources that attempt to move beyond cultural essentialism and look at how people from a variety of cultures have adapted Islamic teachings and practices to suit their own ideas and lives. Indeed, the first reading examines how Muhammad himself borrowed heavily from the cultures around him when he began his career as a prophet. Respond to each of the questions posed for these three readings:

Reading 1. Briefly describe at least three examples of the Qur'an's mythic origins.

Source: Tim Callahan, "The Mythic Origins of the Qur'an" *Skeptic Magazine* 16,3 (2001), 14-21.

Reading 2. Describe the three stages of Islam in West Africa. In which stage do you notice changes in Islam and what were the changes?

Source: The Spread of Islam in West Africa. [http://spice.stanford.edu/docs/the\\_spread\\_of\\_islam\\_in\\_west\\_africaContainment\\_mixing\\_and\\_reform\\_from\\_the\\_eighth\\_to\\_the\\_twentieth\\_century/](http://spice.stanford.edu/docs/the_spread_of_islam_in_west_africaContainment_mixing_and_reform_from_the_eighth_to_the_twentieth_century/).

Reading 3. How did Central Asians adapt Islam to their own cultural traditions?

Source: Xinru Liu, "A Silk Road Legacy: The Spread of Buddhism and Islam" *Journal of World History* 22, 1 (2011), students read section on Islam during Mongol rule, 73-81.

### **Week Eleven:**

**Lesson One:** Why do we even have a cultural category called the "West"?

#### **In class:**

One of the goals of this theme is to help students understand that history changes constantly because different people have different interpretations of the past. It is important to convey to students that much of what we might consider as unique to or indicative of the West is a product of history writing and historical interpretation. Most important for them to consider is that the ways in which history is told or written often say more about the historian's own perspective, identities, and time than they do about the historical subject in question.

10 min. Warm-up discussion. Ask students to write at least three characteristics of Westerners or Western culture. Ask them to recall where they might have gotten that information. Call on students (taking care to include students who do not voluntarily participate) and generate their responses on the board. Instructors can ask students to refer to the first day of the issue when they did this same exercise.

10 min. Define the term historiography and relate it to constructing sets of ideas about particular societies. (In other words, why historians are relevant in shaping international relations).

## Special Section: Teaching and Learning the Personal and the Present in World History

30 min. Interactive lecture with PowerPoint presentation that weaves small group discussions about each of the previous night's readings.

- Students begin with a five-minute small group discussion (4-5) of the historical origins of “the West” that Lockman identifies. Ask for several groups to respond. Chart this on the board or embed it into a PowerPoint presentation.
- Reveal that the “West,” as many Westerners define themselves is a directional and geographic identity that has, at specific historical points, been used to argue that there are distinct “civilizations” in the world whose differences are natural, innate, and unchanging.<sup>11</sup>
- Relate that, geographically, the West includes Europe but also its settler societies in the United States, Canada, Australia, Argentina, South Africa, and many other places where there are large contingents of people descended from Europeans (the expanded West that took shape from the 16<sup>th</sup> through the 19<sup>th</sup> centuries). Also relate that prior to the idea of the West, or even the idea of Europe, Christians living in Europe (now considered part of the West) connected their own identities to the realm of Christendom. While Western societies are largely secular, many who identify as Western argue that Christianity is an important historical component of that identity.
- Relate that politically, culturally, and economically, Western identity is rooted not only in what many self-identified Westerners consider as inherent in their own culture, but also in what they consider to be innate to other cultures, including Islam, or Asia, or the East, or the Orient, or whatever differential marker is ascribed to people living outside of Western cultural norms.<sup>12</sup>

25 min. Book review sharing. Students return to their groups and share with group members the essential critique that the reviewer has about Lockman’s book (some group members will likely have the same review). 10 minutes. Instructor selects at least 4 different critiques (time permitting) from among the groups. Final question: Did any of the reviewers selected differ with Lockman on the historical origins of the idea of the West? 15 min.

### **Reading (to be completed the evening before class):**

Zachary Lockman, *Contending Visions of the Middle East: The History and Politics of Orientalism* (New York: Cambridge University Press, 2004), 9-27, 55-65.

Students also seek out one book review using WSU library resources and summarize the “conversation” that the reviewer has with Lockman.

### **Assignment (to be handed in during class):**

In this assignment, you will first attempt to understand the historical origins of the idea of the West as related by Zachary Lockman.

Secondly, you will investigate how one other scholar has responded to Lockman’s book as a whole.

You will submit a one page single-spaced assignment (along with a copy of your book review) that accomplishes both of these goals. This is in lieu of a reading post for this lesson.

To begin, read pages 9-27 and 55-65 in *Contending Visions of the Middle East* and respond to the following questions (about ½ page, single-spaced): What is the “West”? Where and when does Lockman locate the historical origins of the *idea of the West*?

Second, go to [www.wsulibs.wsu.edu](http://www.wsulibs.wsu.edu). In the top right corner, click “Find Journal Articles.” In the quick search box, type “contending visions of the middle east,” using quotation marks. Select “general” as your subject. Once the search engine populates a list, select a review that has full text access. There is an icon that reads “ft” on the far right. Print out this article and attach it to your assignment.<sup>13</sup>

Read the review you’ve selected and answer the following questions: 1. Who is reviewing *Contending Visions*? What institution is s/he associated with? Hint: You may need to do a web search on this person. In which academic journal does the review appear? What strengths of *Contending Visions* does the reviewer identify? What weaknesses does s/he discuss?

**Lesson Two:** Is the origin of the clashing civilizations theory the Medieval Crusades?

### **In class:**

Supporters of the clashing civilizations theory often invoke the medieval crusades of Christian Europe as evidence that current conflicts between Muslims and the West have deep and unbroken connectedness to the ancient past. While there certainly are historical connections here, historical evidence suggests that there is nothing inevitable about conflicts between Christianity and Islam.<sup>14</sup>

Before class, students read crusade accounts from a European (not a crusader) and an Arab Muslim. The goal of this lesson is to put the idea of crusades into its historical context. In particular, students should be able to understand that holy war was not the only factor determining the relationship between Christians and Muslims during the medieval period and that despite bloodshed, a great deal of non-violent interaction, collaboration, understanding, and appreciation also occurred. The readings bear this out.

30 min. Interactive lecture with PowerPoint presentation using maps should cover four main points:

- Not all of the Crusades targeted the “Holy Land.”

## Special Section: Teaching and Learning the Personal and the Present in World History

- Crusading Catholics (Franks) targeted Eastern Orthodox Christian sites too.
- Inability of Franks to secure territory and the necessity of collaboration with Jewish and Muslim residents in the Holy Land and elsewhere.<sup>15</sup>
- Instructors may choose to briefly relate the chronology of the Crusades and then focus on the Fourth Crusade that targeted Constantinople.

30 min. Small group discussion of “Usâma: from Memoirs” and “To Go Among the Saracens.” Students work in groups of 4-5 to produce a list of 4 examples from each document that demonstrate how this Muslim and this Christian think about each other’s religions and cultures. Groups then share their examples with the class. Lists are handed in for credit.

Do students have a sense that either Usâma ibn Munqidh (1095-1188 CE) or Francis of Assisi (Robinson article) perceived a fundamental clash of civilizations between Muslims and Christians?

What do you think matters more for understanding current problems: the very deep past or more recent phenomena? In other words, are the Crusades helpful in understanding why there is tension between the West and the Arab/Muslim world? Why or why not?

### ***Reading (to be completed the evening before class):***

“Usâma: from Memoirs” in William McNeill and Marilyn Robinson Waldman, *The Islamic World* (Chicago: University of Chicago Press, 1973),

Scott Robinson, “To Go Among the Saracens: A Franciscan Composer’s Journey into the House of Islam,” *Crosscurrents* (Fall 2006), 413-423.

Zachary Lockman, *Contending Visions of the Middle East: The History and Politics of Orientalism* (New York: Cambridge University Press, 2004), 27-37.

### ***Assignment (to be completed the evening before class):***

Post to a discussion thread on Angel. First read “Usâma from Memoirs” and “To Go Among the Saracens.” Then respond: Did either Usâma ibn Munqidh (1095-1188 CE) or Francis of Assisi (Robinson article) perceive a fundamental clash of civilizations between Muslims and Christians? Why or why not? Use at least two specific examples from each account to support your argument. Finally, do Usâma’s and Francis of Assisi’s experiences during the Crusades either support or

challenge the narrative of the Crusades discussed by Zachary Lockman? Why or why not?

**Week Twelve:** Understanding Orientalism and its Relationship to Foreign Policy

**Lesson One:** Is the West’s view of the Arab and Muslim worlds based on reality or perception?

#### ***In class:***

The overarching goal for today’s class is to introduce students to the concept of Orientalism as articulated by Edward Said in his 1978 book of the same name and to help students apply that theory to how Arabs and Muslims are represented through different media outlets. Orientalism seeks to answer the question of why and how Westerners have preconceived notions of the Middle East and the people that live there.<sup>16</sup>

10 min. Students work in groups of 4-5 to define and describe the idea of Orientalism (they read about it for their reading post). What adjectives does it conjure up? Instructor generates a list on the board.

10 min. Mini-lecture to define the term Orientalism and to situate it in its historiographical context. Key points include:

- That Said argues that the construction of knowledge about an Eastern other was closely linked to the projection of power through foreign policy (empire).
- That Said did not argue that there exists an inherent or fundamental clash of cultures between the Islamic and Arab worlds and the West. Rather, he argued the West has historically ascribed its own simplistic, base, and self-serving interpretations of who Muslims are or who Arabs are and, in doing so, has greatly distorted Arab and Muslim culture and perpetuated the myth of inherent difference(s).
- That Said serves then, for our purposes, as a counter-narrative to Huntington’s claim that the clash of civilizations is innate, even if Huntington does not openly or blatantly ascribe to some of the more crude Orientalist visions of Muslims and Arabs.

25 min. Knowing and Representing Orientals in the 19<sup>th</sup> century. Interactive Lecture with PowerPoint Presentation and interview with Edward Said. Ask students what emotions, ideas, and descriptions 19<sup>th</sup> century European Orientalist art is supposed to conjure up. In other words, what do these paintings say about the East and its people? (images available in a PowerPoint presentation in the Visuals Folder).

- *Massacre at Chios* (1824) - Eugène Delacroix (1798–1863)
- *Death of Sardanapalus* (1827-28) - Eugène Delacroix (1798–1863)
- *Turkish Bath* (1862) - Jean-Auguste-Dominique Ingres (1780–1867)
- *The Snake Charmer* (1870) – Jean-Léon Jérôme (1824–1904)

## Special Section: Teaching and Learning the Personal and the Present in World History

Instructors may consult the Metropolitan Museum of Art for more examples:

[http://www.metmuseum.org/toah/hd/euor/hd\\_euor.htm](http://www.metmuseum.org/toah/hd/euor/hd_euor.htm)

Then show: On Orientalism. Interview with Edward Said, Part 1. [http://www.youtube.com/watch?v=xwCOSkXR\\_Cw](http://www.youtube.com/watch?v=xwCOSkXR_Cw). (10:36) End here for 3-day a week format.

30 min. How have Arabs and Muslims been depicted in the news media in the last 30 years?<sup>17</sup>

Show:

Colbert Report. "Norwegian Muslum Gunman's Islam-Esque Atrocity" [www.colbertnation.com](http://www.colbertnation.com). July 25, 2011. <http://www.colbertnation.com/the-colbert-report-videos/393042/july-25-2011/norwegian-muslum-gunner-s-islam-esque-atrocity> (accessed October 12, 2011).

On Orientalism. Interview with Edward Said, Part 2.

<http://www.youtube.com/watch?v=n0HYX9JRH8o&feature=related>. Instructors will want to qualify Said's statement that the United States has never directly occupied the Middle East. The interview pre-dates the invasion and occupation of Afghanistan in 2001 and Iraq in 2003. (9:55)

On Orientalism. Interview with Edward Said, Part 3. <http://www.youtube.com/watch?v=tLF5ED-gE5Y&feature=related>. (10:46)

If time permits, students spend 5 minutes either discussing or writing down other examples of Orientalist representations that they can think of (movies, recent news).

### **Reading (to be completed the evening before class):**

Zachary Lockman. *Contending Visions of the Middle East: The History and Politics of Orientalism* (New York: Cambridge University Press, 2004), 66-98, 182-201.

### **Assignment (to be completed the evening before class):**

Post to a discussion thread in Angel. Using the assigned chapters from *Contending Visions*, answer the following questions.

1. What is Orientalism? Identify at least two mediums through which it has been expressed.
2. What is the relationship between Orientalism and European empire in the 19<sup>th</sup> and 20<sup>th</sup> centuries as related by Lockman?
3. How and why do Lockman and Edward Said consider Orientalism to be a system of knowledge, or a lens through which one might view and act upon the world? Respond to one other student's post.

### **Lesson Two: What is the relationship between Orientalism and American foreign policy?**

This final lesson examines the role of foreign policy in both creating and responding to the perceptions and realities covered during the previous lesson. It also returns to the final question about clashing civilizations. Since American foreign policy and its reactions could certainly be conceived as "clashes" between two civilizations, the idea here is for students to think critically about whether or not these actual encounters have anything to do with some perceived innate difference or whether they simply

reinforce the Orientalist body of knowledge that has colored this relationship.

### **In class:**

5 min. Show short excerpts from George W. Bush's September 20, 2001 address to a Joint Session of Congress, in which he outlines the goals and strategies (albeit vaguely) of the coming "war on terror." The speech is available at <http://www.americanrhetoric.com/speeches/gwbush911jointssessionsspeech.htm>.

10 min. Class discussion (write questions on the board before starting the speech). Does the former president borrow from the clash of civilizations theory? If so, how? Does Bush's language and choice of words reflect an Orientalist perception of Muslims and Arabs? Why or why not?

30 min. Interactive lecture with PowerPoint presentation. Lecture should cover:

- British and U.S. support of Israel after 1917.
- The 1953 CIA coup that ousted democratically elected Iranian leader Mohammed Mossadeq.
- U.S. support of Osama bin Laden's mujahadeen campaign against the Soviets in Afghanistan in the 1980s.
- 1991 U.S. invasion of Iraq.
- 9/11 as an example of blowback.<sup>18</sup>

25 min. Final small group (4-5) discussion. Given what you now know about the history of how the West has "known" the East (or the Orient), does a fundamental or essential clash of civilizations exist between the West and the Muslim world?

Groups provide at least 3 specific reasons to support their answers using the body of knowledge that they have constructed throughout the course of this issue. Groups turn in their list of reasons.

### **Reading (to be completed the evening before class):**

Chalmers Johnson. "Blowback." *The Nation*. October 15, 2001, 13-15.

John Perkins "Civilization on Trial," in his *Confessions of an Economic Hit Man* (San Francisco: Berrett-Koehler Publishers, 2004), 42-46.

Jeremy Scahill, "Blowback in Somalia: How US proxy wars helped create a militant Islamic Threat." *The Nation*. September 26, 2011. 11-22.

Zachary Lockman, *Contending Visions of the Middle East: The History and Politics of Orientalism* (New York: Cambridge University Press, 2004), 233-236.

### **Assignment (to be completed the evening before class):**

Post to a discussion thread in Angel. What does the term "blowback" mean? Where did the term originate? Give at least three specific and descriptive examples of blowback from at least three of the four readings, keeping in mind that two of the

## Special Section: Teaching and Learning the Personal and the Present in World History

readings do not use the term blowback specifically and it is up to you to identify it using critical thinking skills. Respond to another's post.

### Complete List of Student Readings:

- Zachary Lockman. *Contending Visions of the Middle East: The History and Politics of Orientalism* (New York: Cambridge University Press, 2004), 9-27, 27-37, 55-65, 66-98, 182-201, 233-236. \*Students purchase this book.
- Huntington, Samuel. "The Clash of Civilizations?" *Foreign Affairs* 72, 3 (Summer 1993): 22-49.
- Saikel, Amin. "September 11 and its Aftermath" in *Islam and the West: Conflict or Cooperation?* New York: Palgrave Macmillan, 2003, 6-23.
- Tim Callahan, "The Mythic Origins of the Qur'an" *Skeptic Magazine* 16,3 (2001), 14-21.
- Xinru Lui, "A Silk Road Legacy: The Spread of Buddhism and Islam" *Journal of World History* 22, 1 (2011), students read section on Islam during Mongol rule, 73-81.
- "Usâma: from Memoirs" in William McNeill and Marilyn Robinson Waldman, *The Islamic World* (Chicago: University of Chicago Press, 1973), excerpts.
- Scott Robinson, "To Go Among the Saracens: A Franciscan Composer's Journey into the House of Islam," *Crosscurrents* (Fall 2006), 413-423.
- Chalmers Johnson. "Blowback." *The Nation*. October 15, 2001, 13-15.
- John Perkins "Civilization on Trial," in *Confessions of an Economic Hit Man* (San Francisco: Berrett-Koehler Publishers, 2004), 42-46.
- Jeremy Scahill, "Blowback in Somalia: How US proxy wars helped create a militant Islamic Threat." *The Nation*. September 26, 2011. 11-22.

### Complete List of Assignments:

1. Discussion post on Clash of Civilizations.
2. Discussion post on multiple Islams.
3. Discussion post on the Crusades.
4. Book review assignment.
5. Discussion post on Orientalism.
6. Discussion post on Blowback.
7. Final group discussion on clashing civilizations.

### Complete List of Visual Materials:

- 1998 Interview with Osama bin Laden. <http://www.youtube.com/watch?v=UnhJwxYsomw&feature=related>
- George W. Bush, Speech to Joint Session of Congress. September 20, 2001. <http://www.americanrhetoric.com/speeches/gwbush911jointsessionspeech.htm>
- On Orientalism. Interview with Edward Said, Part 1. [http://www.youtube.com/watch?v=xwCOSkXR\\_Cw](http://www.youtube.com/watch?v=xwCOSkXR_Cw).

On Orientalism. Interview with Edward Said, Part 2. <http://www.youtube.com/watch?v=n0HYX9JVH8o&feature=related>.

On Orientalism. Interview with Edward Said, Part 3. <http://www.youtube.com/watch?v=tLF5ED-gE5Y&feature=related>.

Colbert Report. "Norwegian Musligh Gunman's Islam-Esque Atrocity" [www.colbertnation.com](http://www.colbertnation.com/the-colbert-report-videos/393042/july-25-2011/norwegian-musligh-gunman-s-islam-esque-atrocity). July 25, 2011. <http://www.colbertnation.com/the-colbert-report-videos/393042/july-25-2011/norwegian-musligh-gunman-s-islam-esque-atrocity> (accessed October 12, 2011). (5:08)

PowerPoint Presentation on Orientalist art. [http://www.metmuseum.org/toah/hd/euor/hd\\_euor.htm](http://www.metmuseum.org/toah/hd/euor/hd_euor.htm)

### Complete List of Lecture and Discussion Topics:

#### Week Ten, Lesson One:

- Warm-up writing and discussion: 3 characteristics of Islam and the West.
- Small group discussion: Is there a fundamental clash between the West and Arab/Muslim worlds?

#### Week Ten, Lesson Two:

- Warm-up discussion about characteristics of Islam.
- Primary source exercise using excerpts from the Qur'an.
- Interactive Lecture on Islam, highlighting its flexibility, adaptation, interpretation, and change over time.
- Small group discussion of two readings on Islam.

#### Week Eleven, Lesson One:

- Interactive Lecture on the Medieval Crusades.
- Small group discussion of "Usâma: from Memoirs" and "To Go Among the Saracens."
- Class discussion: Do Usâma's and Francis of Assisi's experiences during the Crusades either support or challenge the narrative of the Crusades discussed by Zachary Lockman?

#### Week Eleven, Lesson Two:

- Warm-up discussion about Westerners and Western culture.
- Interactive Lecture on the construction of the idea of the West.
- Book review sharing in groups.

#### Week Twelve, Lesson One:

- Small group discussion of Orientalism.
- Mini-lecture on Orientalism and its historiographic context.
- Interactive lecture/discussion of 19<sup>th</sup> century Orientalist art.

#### Week Twelve, Lesson Two:

- Discussion of GWB September 20, 2001 speech.
- Interactive lecture on U.S. foreign policy in the Middle East

## Special Section: Teaching and Learning the Personal and the Present in World History

since WWII.

- Final discussion (small groups and as a class): Given what you now know about the history of how the West has “known” the East (or the Orient), does a fundamental or essential clash of civilizations exist between the West and the Muslim world?

### Notes

- 1 For an overview of the curriculum change process ongoing at Washington State University, see <http://universitycollege.wsu.edu/genedrevise/index.html>. The history department’s 100-level course offerings will absorb World Civ. I and II and these courses will - pending approval - fulfill UCORE Diversity elective requirements.
- 2 Jesse Spohnholz articulated this narrative arch best in our committee meetings.
- 3 Instructors can refer to Tim Callahan, “The Mythic Origins of the Qur'an” *Skeptic Magazine* 16,3 (2001), 14-21. Students read this the night before, but instructors can use parts of it for lecture and model the use of secondary sources for the class.
- 4 See Natana J. Delong-bas, *Wahhabi Islam: From Revival and Reform to Global Jihad* (New York: Oxford University Press, 2004), 7-17.
- 5 See Mark Sedgwick, *Sufism: The Essentials* (Cairo: American University of Cairo Press, 2000), 1-16, 103-107 (glossary).
- 6 See Gerald Hausman, *The Kebra Nagast* (New York: St. Martin’s Press, 1997), 11-21.
- 7 See George A. Rawlyk and Mark A. Noll, *Amazing Grace: Evangelicalism in Australia, Britain, Canada, and the United States* (Grand Rapids, M.I.: Baker Books, 1993), 15-25; Daniel G. Reid, ed., *Dictionary of Christianity in America* (Downers Grove, I.L.: Intervarsity Press, 1990), 413-416.
- 8 Xinru Lui, “A Silk Road Legacy: The Spread of Buddhism and Islam” *Journal of World History* 22, 1 (2011), students read section on Islam during Mongol rule, 73-81.
- 9 David Robinson, *Muslim Societies in African History* (New York: Cambridge University Press, 2004), 27-59.

10 See Ahmad Ibrahim, Sharon Siddique, and Yasmin Hussain, eds., *Readings on Islam in Southeast Asia* (Singapore: Institute of Southeast Asian Studies), 3-4, 36-41, 45-47; Luis Filipe Ferreira Reis Thomaz, “the Malay Sultanate of Melaka,” in Anthony Reid, ed., *Southeast Asia in the Early Modern Era* (Ithaca: Cornell University Press, 1993), 67-90; <http://www.seasite.niu.edu/crossroads/russell/islam.htm>

11 See, Martin Lewis and Kären Wigen, *The Myth of Continents: A Critique of Metageography* (Berkeley: University of California Press, 1997), 47-103.

12 For more on this see, Lewis and Wigen, *The Myth of Continents*, 47-103; Alastair Bonnett, *The Idea of the West* (New York: PalgraveMacmillan, 2005).

13 Instructors should of course adapt this assignment to their own libraries.

14 For analysis of this historical problem, see Amin Saikal, *Islam and the West: Conflict or Cooperation?* (New York: Palgrave Macmillan, 2003), 24-39.

15 Instructors may consult Jonathan Riley-Smith, ed., *The Oxford Illustrated History of the Crusades* (New York: Oxford University Press, 1995); Jonathan Riley-Smith, *The Crusades Christianity and Islam* (New York: Columbia University Press, 2008). For a specific example of the diversity of intentions and motivations among Crusading Christians, see Solomon bar Samson, “The Crusaders in Mainz, May 7, 1096,” <http://www.fordham.edu/halsall/source/1096jews-mainz.asp>.

16 It will be important for instructors to become conversant with the introduction to Edward Said, *Orientalism* (New York: Vintage, 1978), 1-28.

17 See Edward Said, *Covering Islam: How the Media and the Experts Determine how we see the rest of the World* (New York: Vintage, 1997 [1981]), 3-68; Jack Shaheen, “Reel Bad Arabs: How Hollywood Vilifies a People” *Annals of the American Academy of Political and Social Science* 588, Islam: Enduring Myths and Changing Realities (July, 2003), 171-193.

18 See Chalmers Johnson, *Blowback* (New York: Owl Books, 2004), Introduction: after 9/11.



World History Association

## Special Section: Teaching and Learning the Personal and the Present in World History

### Globalization, Past and Present: Is History Repeating Itself?<sup>1</sup>

Richard Weiner

*Indiana University-Purdue University Fort Wayne*

An academic dispute over the origins of globalization is settled. Today's globalization is not as unique as the analysts that first coined the term maintained.<sup>2</sup> The word emerged in business and economic literature in the 1970s, an era during which free market ideology became more pronounced. During the 1980s and especially the 1990s the term globalization became more widely used in the social sciences and popular literature. Business studies that coined the word and social scientists that followed in their footsteps contended that globalization described current and unprecedented global interconnectedness. Since the 1990s, however, numerous studies have challenged the claim that globalization is unique to contemporary society. Much of this revisionist literature locates globalization's origins in the late nineteenth and early twentieth centuries, and has argued that global trade, production, and investment were as significant a century ago as they are today.<sup>3</sup> Hence revisionism has demonstrated that today's globalization is not unprecedented, for its historical origins are a century old.<sup>4</sup>

But settling *that* debate begs a new question: how similar are these two chapters in globalization? This is the query that this essay tackles. It examines Mexico, a developing nation.<sup>5</sup> It is a particularly intriguing example for several reasons. First, it provides a case study of a developing country's relations with advanced nations, for Mexico has significant ties with the U.S. and leading European nations.<sup>6</sup> Second, Mexico's contemporary and historical globalization experiences are both very prominent. Mexico's nineteenth-century episode corresponded with Porfirio Díaz's long tenure as president (1876-1911). During this 35 year period—termed the “Porfiriato” in reference to the president's name—Mexico and Diaz attracted worldwide attention because of the nation's high economic growth rate and booming exports.<sup>7</sup>

The Porfiriato then became notorious when it ended violently with the 1910 Mexican Revolution, which lasted a decade and claimed perhaps half a million Mexican lives. Beginning in the 1920s, the revolutionary government insulated Mexico from the global economy, a status maintained through the 1970s. Mexico's current globalization era, which began in 1982 and is still on-going, is termed the “neoliberal” period since in some respects it harkens back to nineteenth century liberalism.<sup>8</sup> Mexican neoliberalism is an especially noteworthy Latin American case since it is a break with Mexico's protectionist and statist brand of capitalism that evolved in the aftermath of the Revolution.<sup>9</sup>

Five presidents have ruled over the neoliberal era, but the one who did the most to integrate Mexico into the global order was Carlos Salinas, who served as president from 1988 to 1994 and negotiated NAFTA in 1994. Finally, comparisons between the neoliberal era and the Porfiriato are commonplace in Mexican political discourse today. Both critics and supporters of Mexico's neoliberal market opening suggest that its roots lie in the Porfiriato. Critics who argue that current inequality harkens back to the Porfiriato term contemporary Mexico as “neo-Porfirian.” Some contemporary critics have strengthened

the association between the two eras by naming their protest movements after contemporary critics of the Porfiriato system.<sup>10</sup> Supporters, in contrast, locate the roots of Mexico's recent economic modernization in the Porfiriato era. Revised Mexican history textbooks contest older versions—in which the repressive Díaz regime ended in a Revolution for justice—by redefining the Porfiriato era as the origin of modern Mexico.<sup>11</sup> Hence, even if critics and supporters have different attitudes about the Porfiriato, they both connect it with the neoliberal era.

Are they right? This is an effective question for world history teachers to engage in class lectures and discussions, for it highlights the issue of change over time. To answer it I compare the two eras in terms of the cases they made for increasing global economic ties, the ways they forged stronger links, and the consequences of those ties. The tendency is to make smooth, fluid historical parallels with the contemporary world with which students are likely more familiar. But that approach can lead to inaccuracy, even if it gets students invested in or excited about history. I argue that simply stating that the two eras are similar since they both reveal strong links between Mexico and the world obscures more than it reveals. Mexico changed significantly over the past century, and thus the process and consequences of Porfiriato and neoliberal globalization deserve more careful attention than simple parallels provide.<sup>12</sup>

#### *Justifying Globalization*

Mexicans have championed the forging of strong global economic ties as a means to safeguard sovereignty, thus Mexican justifications for globalization afford world history teachers the opportunity to explore power disparities between advanced and developing nations with their students. Furthermore, since Porfiristas and neoliberals faced unique challenges to national independence, my comparison between the two eras enables educators to make contrasts between the threats developing nations faced a century ago and those they face today.

During the Porfiriato era a small but highly influential group of regime insiders known as the *científicos* (“scientists”) raised the issue of sovereignty. Given Mexico's history it is unsurprising that sovereignty was paramount. Mexican won independence from Spain in 1821. Over the next three decades Spain tried to retake Mexico militarily, France invaded, Texas declared its independence, and Mexico lost half its territory to the United States in the Mexican-American War (1846-48). In the 1860s France invaded again with 30,000 troops and established the Second Empire, but a Mexican liberal resistance movement prevailed and Mexico regained sovereignty in 1867.<sup>13</sup> Though European nations established formal colonies in Africa and Asia and Mexico had been invaded repeatedly, *científicos* stressed economic sovereignty. Their focus is unsurprising since they lived during the Second Industrial Revolution, an era characterized by new technologies and unprecedented levels of productivity. In fact, the Second Industrial Revolution largely created the export boom in Porfiriato Mexico and other parts of Latin America. North American and European demand for Latin America's industrial raw materials (including henequen, oil, nitrates, copper, etc.) and agricultural goods (coffee, sugar, beef, etc.) ballooned.<sup>14</sup> Not only were *científicos*

## Special Section: Teaching and Learning the Personal and the Present in World History

well aware of economic advances, they were also economic determinists and social Darwinists. They envisioned the global stage as a Darwinian survival-of-the-fittest battle waged on an economic front. Things did not bode well for Mexico, since *científicos* deemed their homeland an economically backward nation. Indeed, economic stagnation dispelled early-national-era predictions of Mexican grandeur.<sup>15</sup> *Científicos* warned that Mexico might perish or be absorbed by more powerful economies, particularly its northern neighbor. The solution, *científicos* maintained, was material progress, which would fortify Mexico and thereby enhance sovereignty.

*Científicos*, who were mestizos with indigenous and Spanish heritage, articulated a form of racialist evolutionism and contended that “backward” Mexico needed to assimilate “advanced” external forces in order to be propelled forward. More specifically, *científicos* maintained that an influx of foreign capital, technology, and blood (in the form of European colonists) would be a source of national advance. This embrace of foreign economic elements departed from some previous formulations of Mexican identity. For example, President Sebastián Lerdo de Tejada (1872–76) associated economic ties between the U.S. and Mexico with loss of sovereignty and thus favored isolation, a position his motto “between strength and weakness, the desert” clearly articulated.<sup>16</sup> In contrast *científicos* championed railroads to link the countries together. Critics of the Díaz regime also depicted the main threats to sovereignty as economic but contended that closer ties with the U.S. were more of a danger than an asset. These critics claimed that the U.S. had begun a new “peaceful conquest” on economic fronts. *Científicos* too were concerned about foreign economic domination. But rather than reject external forces, they hoped to assimilate them in order to propel Mexico forward, and they believed that they could take measures against foreign domination. These included pitting American investors against Europeans so the former could not become too dominant, and nationalizing industries in which foreigners became too powerful.<sup>17</sup>

A century later, Salinas also saw globalization as a means to safeguard sovereignty, but the late-twentieth-century economic threats to national survival he identified were distinct.<sup>18</sup> One might wonder why Mexico was still preoccupied with sovereignty since it had not been invaded since the 1910s. Safeguarding sovereignty remained at the forefront owing to Mexico’s nineteenth-century legacy of foreign interventions, the nationalist rhetoric of the Revolutionary state, and America’s rise to global dominance in the twentieth century. In the decades preceding the neoliberal period Mexico’s recipe for sovereignty vis-à-vis the world powers was state regulation of foreign interests. Conversely, Mexicans associated a diminished role for the state (precisely what Salinas advocated) with loss of sovereignty since without it powerful foreign interests would subjugate Mexico. Consequently, Salinas made novel arguments to associate open markets with sovereignty, for his position countered Mexico’s revolutionary nationalist discourse.

Salinas contended that the late-twentieth-century world posed novel threats to sovereignty. The Cold War and the bi-polar world it had created in the aftermath of WWII had finally come to an end with the collapse of the Soviet Union. The new reality

was one of international pluralism in which nations were more connected than before. In this new context the old statist model of development was no longer viable, which, Salinas maintained, the demise of the Soviet Union clearly demonstrated. Salinas argued that Mexico needed to transition to a market system in order to remain strong. His claim not only explicitly challenged Mexico’s revolutionary nationalism but also a strand in Western anti-globalization discourse that associated globalization with the loss of national sovereignty at the powerful hands of global capital and international corporations. Salinas countered that increased global ties strengthened sovereignty. Foreign trade and investment would bolster Mexico by modernizing, diversifying, and growing the economy, and by creating jobs, an imperative in the face of a swelling population.

### Constructing Globalization

Contrary to neoliberal theory, which associates international trade with the natural order of things, global markets are forged by human actions.<sup>19</sup> Mexicans’ efforts to link their nation to the world provide instructors with historical examples to teach their students about constructing world markets. The Mexican case is compelling since the process of forging global ties during the Porfirian and neoliberal eras is a study in contrasts. Additionally, teachers can use Mexico as a case study to delve into issues of neoliberalism versus state-sponsored economics since the state’s role fluctuated considerably over the course of the twentieth century.

The international business community hailed Díaz and Salinas as heroes, yet the two presidents had contrasting strategies to link Mexico to the global economy.<sup>20</sup> Salinas’ strategy was primarily one of scaling back the state’s role, and the Porfirian method was one of building it up.<sup>21</sup> Not only the policies, but also the rhetoric of the two eras reflected this difference. Salinas associated the market with freedom and productivity and the state with inefficiency and repression. Hence Salinas rejected the revolutionary era discourse that associated the state with development. For Salinas, a civil society that operated in a free market economy was the basis of Mexico’s modernity. By depicting Mexicans as active and productive members of market society Salinas was able to associate the market system he embraced with social justice and uplift, prominent themes in Mexican discourse since the 1910 Revolution.<sup>22</sup> Even if *científicos* were not “statists” of the twentieth-century variety, they nevertheless contradicted Salinas’ formula by placing more faith in the state than civil society.

*Científicos*, who were influenced by scientific racism, placed little faith in Mexico’s population, particularly the nation’s large indigenous community. Also in contrast to Salinas, *científicos* did not celebrate the free market. This was not a unique stance. In the late nineteenth century, classic economic liberalism—with its strong laissez faire position—was rejected for a more eclectic, flexible, and pragmatic economic liberalism. *Científicos* lack of deference to the free market was rooted in their rejection of abstract economic theory and their belief that the power of the state was needed to construct an environment in which capitalism would develop in “backward” Mexico. Salinas’ ideals were actually more in keeping with a classic

## Special Section: Teaching and Learning the Personal and the Present in World History

liberal economic ideology of early nineteenth-century Mexico. Both sought to free the market from constraints—the former from a corporate colonial era heritage and the latter from a statist Revolutionary era heritage.

Let us now turn to Porfirian construction of globalization. During the nineteenth century—particularly after mid-century—global economic ties increased dramatically, as demonstrated by significantly higher levels of world trade and investment. The Second Industrial Revolution and the transportation revolution (which made hauling goods across land and water cheaper and faster than ever before) increased global ties. From the age of independence (1820s) until the Porfiriato (1870s) Mexico's participation in this new global economic order was limited, and the Mexican economy stagnated. According to *científicos*, greater ties to the world economy presented opportunities for trade, investment, the introduction of new technologies, industrialization, increased productivity, and, more broadly, material progress.

But linking Mexico more fully into the world order would be no easy task, for numerous conditions worked against integration.<sup>23</sup> The environment—a mountainous topography and lack of navigable rivers—proved to be a physical obstacle to commercial ties and exploiting natural wealth, particularly in remote regions. Land tenure patterns proved to be another impediment. Despite the liberal Reform Laws of the 1850s, which outlawed corporate property (that belonged to indigenous communities and the Catholic Church) and strengthened private property, rural Mexico (particularly in the center and southern regions) was still dominated by Indian villages. Furthermore, Mexico had vast public lands that had not been surveyed. Mexico also had a labor scarcity, for after independence the nation had experienced little population growth and self-sufficient Indian villagers did not need full wages. Mexico also faced social problems. Power transferred via military coup rather than the ballot box (following the traditional practice, Díaz came to power via a military uprising), and recalcitrant Indian groups still existed.

Porfirian Mexico overcame these obstacles to global integration. The state played a critical role by constructing a physical, legal, and social climate conducive to international capitalism. The state provided subsidies to private companies to build railroads, and later (after 1900) when the companies failed to build a comprehensive network the state nationalized the railroads and took control of construction. State “spending on new sectors of the economy grew more than 10 percent a year from 1867 to 1910, with the result that federal outlays to develop transportation and communication infrastructures reached 10 percent of GDP in 1905-10.”<sup>24</sup> To turn land into a commodity state and local governments hired surveyors who surveyed public lands and Indian villages, which were then sold as private property. To create stable social conditions for capitalist development, the Porfirian state enhanced the police force and army, carried out Indian wars to defeat resistant ethnic groups, and financed a global public relations campaign to entice foreign investment.<sup>25</sup> To encourage trade and investment the state revised its commercial code and mining laws and placed Mexico on the gold standard. To construct a labor force to produce for the export

economy the state passed colonization laws to attract foreigners and vagrancy laws to compel natives to work, and also created technical schools to train workers.<sup>26</sup>

Neoliberals faced different obstacles in their endeavor to forge strong international ties. Impediments were constructed in the decades after the 1910 Revolution, which ushered in a new era of statism, nationalism and corporatism. After post-revolutionary national “reconstruction” in the 1920s, a corporatist political system directed by a strong state emerged in the 1930s. State capitalism strengthened during the so-called “Mexican miracle,” a three-decade era (1940-1970) characterized by high economic growth rates and rapid industrialization. Scholars label growth in Mexico (and Latin America more generally) during the “miracle” inward-directed development. The state regulated foreign investment and trade. Subsidies for national industries and high tariffs (Mexico had some of the highest tariffs in the world) protected Mexican industry. Further reflecting this nationalist sentiment, Mexico nationalized foreign enterprises, most notably the oil industry. Thus, the state not only supported private Mexican industry, but also became a major industrial power itself. By 1980 there were over 1,000 state enterprises, including oil, airlines, steel, and telephones.<sup>27</sup>

Facilitating Mexico’s neoliberal globalization required a dismantling of the Revolutionary state that was constructed in the six decades after the Mexican Revolution. Material and ideological factors both played a role in this disassembling project.<sup>28</sup> On the ideological level neo-classical economic ideas came back into vogue, and Mexican leaders since the 1980s (many of whom studied in the U.S.) have been drawn to them. On the material plane, Mexico’s external debt restructuring in the 1980s gave international agencies (particularly the IMF and World Bank) some leverage, and they strongly promoted liberalization, especially lowering tariffs and shrinking the welfare state.<sup>29</sup>

In terms of timing, liberalization started during Miguel de la Madrid’s presidency (1982-88), culminated during Salinas’ tenure (1988-1994), and underlies Mexico’s economy today. This dismantling project had several components, one of which was tariff reduction. In 1986 Mexico joined GATT (membership in this international commercial group required substantial tariff reduction). In 1994 NAFTA ended all tariffs between Mexico, the United States, and Canada (some tariffs ended immediately, others were scheduled to be eliminated later). Dismantling also entailed lifting governmental restrictions on foreign capital, notably the requirement that a firm be at least 51% nationally owned, and requirements that foreign firms use local suppliers/inputs, regulations that had been put in place to encourage technology transfer and linkages between foreign firms and the Mexican national economy. Dismantling also required “liberating” land from state control, thereby strengthening private property and encouraging private investment.

Salinas’ 1992 reform of Article 27 of the 1917 Constitution achieved this goal. By re-creating the pre-Columbian *ejido* land system—under which lands could not be alienated or circulated on the market—as one form of Mexican land tenure, Article 27 remedied Porfirian land privatization and concentration, which had displaced Indians from their villages.

## Special Section: Teaching and Learning the Personal and the Present in World History

Salinas' 1992 Reform legalized transforming ejidos into private property to be sold on the market. Finally, dismantling released industries from state control, thereby creating more opportunities for the private sector to invest and own Mexican businesses.<sup>30</sup> By the 1990s almost all state industries were privatized, including banks, telecommunications, and airlines. Currently there is a heated debate surrounding the privatization of the last major state industry—oil.<sup>31</sup>

### *Globalization's Consequences*

Do globalization's consequences differ in rural undeveloped countries and urban modern nations? The comparison between Porfirian and neoliberal Mexico provides teachers an ideal example to explore this question with their students, for the former was agrarian and the latter urbanized. Globalization impacted Mexico on three important socio-economic fronts: Mexican industry, Indian society, and labor markets. Globalization had a distinct impact in each period; hence this section further develops my point that historical contexts—which change over time—shape the specific contours of globalization.

The first example examines globalization's consequences on Mexican industrialization. During the Porfirian era Mexico industrialized and during the neoliberal period Mexico de-industrialized. Changing historical conditions explain the antithetical outcomes. Even if there were antecedents, modern Mexican industry emerged in the Porfirian era, during which Mexico developed manufacturing industries, such as beer, cement, explosives, and steel.<sup>32</sup> What accounts for Porfirian industrialization? On the ideological level there was a strong desire to create national industry since manufacturing was a hallmark of modernity and sovereignty, as powerful industrial nations like Britain and the U.S. demonstrated.<sup>33</sup> Furthermore, *científicos* were not rigid laissez-faire ideologues. Consequently, rather than letting the market dictate, they championed pro-industrial policies with government direction. Hence, even though tariffs were generally reduced during the Porfiriato, a blend of industry-specific tariffs and government subsidies to targeted sectors aided in Porfirian industrialization.<sup>34</sup> Porfirian modernization, urbanization, class formation, and consumer culture all bolstered Mexican demand for domestically-produced manufactured goods.

The historical context of the neoliberal era was distinct. It was preceded by Mexico's so-called "golden age" of industrialization (the "Mexican miracle"), which was driven by interventionist governmental policies—termed "import substitution industrialization" since domestic manufactured goods replaced imports—to develop national industries. By 1970 Mexico was a modern industrial country. In the 1980s, free market ideology and international pressure led to a dramatic lowering of protectionist tariffs and other forms of government support to Mexican industry. The result? De-industrialization.<sup>35</sup> Without government aid and protection, many Mexican industries failed. The irony is that today—in contrast to the Porfirian era when Mexico exported primary goods—Mexico is mainly an exporter of finished goods, and "manufacturing" consists mainly of low-skilled and poorly paid laborers assembling products using imported parts. These assembly plants, known as maquiladoras,

have very limited connection to the domestic economy since parts are imported, domestic inputs are not required, and products are exported. Unsurprisingly, the maquiladora industry has not aided in the transfer of modern technologies, a hallmark of successful industrialization.<sup>36</sup>

The second example is globalization's impact on rural Mexico. My argument is not that the consequences were distinct in each period (as in the previous example), but rather that the degree of the impact was much greater in the Porfirian era. The difference in magnitude was so large that it is perhaps misleading to compare the eras. Indeed, when measuring the impact that external forces had on indigenous Mexico, a case can be made that the Porfiriato was more of a watershed than the Spanish Conquest (sixteenth century) or national independence (1821).<sup>37</sup> Notwithstanding the tremendous changes wrought by conquest and colonization, during the colonial era (1521-1821) Indians continued to live in villages, as they had done before the Spanish Conquest.<sup>38</sup> After Independence the Reform Laws (1850s) outlawed corporate property, but Indians mostly remained in their villages since economic pressures were insufficient to change established land tenure patterns.

This all changed in the Porfiriato, a prolonged era of high economic growth during which communal villages were transformed into private land, some of which was used for export production.<sup>39</sup> Displacement from communal lands profoundly altered Indians' existence; Mexico began to transition from a caste society to a class society. The magnitude of this change can be seen in Mexican Revolution of 1910, which in some ways was a reaction to Porfirian excesses. One element in it was revolutionary agrarianism, symbolized by Emiliano Zapata's famed 1911 Plan de Ayala, which called for the return of Indians' ancestral lands.<sup>40</sup> Article 27 of the 1917 Constitution further reflected this impulse since it made the pre-Columbian village ejidos a legal form of land tenure. Reversing Porfirian policies—and thus illustrating their great impact on Indians—Indians received ejidos over the twentieth century (albeit intermittently) until Salinas reformed Article 27 in 1992.

Neoliberalism's impact on indigenous Mexico has not been nearly as significant. Despite the re-introduction of ejidos in the aftermath of the Mexican Revolution, today Mexico is primarily urban, whereas in the Porfirian era it was mostly a rural country. Since rural Mexico is less prominent today the neoliberal global episode has been less consequential for Indian villagers than was its Porfirian predecessor. Furthermore, the Porfirian episode targeted rural Mexico more than the neoliberal era did. The Porfirian export boom was rural (primarily mining and agriculture), but during the neoliberal era exports have been a combination of rural products and assembled goods produced in urban settings. Thus, even though displacement occurred during both eras (neoliberalism displaced Indian and mestizo farmers since their crops could not compete with cheap agricultural imports<sup>41</sup>), the Porfirian export boom had a much greater impact on rural Indians.

Unsurprisingly, indigenous social movements against neoliberalism have not been as powerful as their Porfirian predecessors, which is another indicator of the larger impact that globalization had on Indians in the Porfirian era. The new

## Special Section: Teaching and Learning the Personal and the Present in World History

indigenous “Zapatista” movement that emerged in Chiapas in 1994 is a case in point.<sup>42</sup> While it took its name from Emiliano Zapata, the hero of agrarian reform in Revolutionary Mexico, it has not been nearly as powerful a movement as its revolutionary era predecessor. The new “Zapatismo” of the neoliberal era has been in existence for almost two decades, but it poses no significant threat nor has it made any real gains. Its continued existence is perhaps an indicator of its weakness: it can be allowed to exist since it does not challenge the status quo. Part of the reason for its weakness can be attributed to the fact that the size of the indigenous population living in villages is much smaller today than it was at the onset of the Porfiriato.

Globalization’s consequences for workers—the last example—differed in each era since the contexts were distinct. In the Porfirian era the national problem was a labor shortage, and in the neoliberal period the dilemma is a labor surplus. Hence the conditions for labor in each episode were, in some ways, antithetical. The Porfirian labor shortage was a consequence of limited foreign immigration to Mexico, high mortality rates, the continued viability of Indians’ subsistence economy, and deaths caused by more than a half century of warfare. The neoliberal era worker surplus was a consequence of high birth rates and low mortality rates (owing to improved health). In the 1960s and 1970s Mexico had one of the highest population growth rates in the world.<sup>43</sup> The discourses of the Porfirian and neoliberal eras reflected these different labor problems.

*Científicos* sought European colonists (*científicos* looked down on Asians and Africans and did not trust Yankees) since Mexico was a vast but sparsely populated territory whereas Salinas sold NAFTA as a job creator that would slow the flood of Mexicans migrating to the U.S. in search of work (which was on the upswing in the 1980s) since there were insufficient jobs in Mexico. Porfirian governmental initiatives to entice foreign immigrants largely failed, so the solution—especially in the countryside in central and southern Mexico—was labor coercion, which took the shape of vagrancy laws and debt peonage. Thus, even if the privatization of Indians communal lands gradually created a rural proletariat, obtaining sufficient workers to meet the production needs of the export boom required labor coercion. Indians groups defeated in the government’s pacification campaigns (especially the Yaquis from Sonora) became compulsory laborers on henequen plantations in southern Mexico. Salinas and other neoliberals maintained market opening would create jobs, but their predictions proved false. The 1990s were especially disappointing. Not only were insufficient jobs created, but NAFTA displaced rural Indian and mestizo farmers. Consequently, in the decade after NAFTA’s passage record levels of Mexicans migrated to the US in search of work.<sup>44</sup> Contemporary discourses advertised these divergences between labor issues in the Porfirian and neoliberal eras. The Porfirian era became notorious for labor coercion, and a dominant theme in the neoliberal period has been the plight of Mexicans migrating to the U.S. to work.<sup>45</sup>

### Conclusion

The cases of Porfirian and neoliberal Mexico offer world history teachers the opportunity to help students make historically

informed comparisons, to recognize the nuances of globalization, and to connect the past to contemporary Mexican-U.S. economic relations. A central point that students should take away from the Porfirian and neoliberal cases is that the historical context in which globalization takes place matters. Mexico changed considerably over the century that divides the two cases. Even though colonial Mexico was economically robust (the world’s leading silver producer and a substantial textile producer), it is not inaccurate to characterize Mexico at the onset of the Porfirian era as a rural country that was somewhat sparsely populated and largely undeveloped, in which Indians mostly lived in villages. At the start of the neoliberal period, Mexico was a modern urban and industrial country with a swelling population. No wonder globalization’s justifications, constructions, and consequences contrasted in the Porfirian and neoliberal periods.

### Notes:

1 The author thanks Alan Sandstrom, Clif Stratton, and Steven Topik for their helpful suggestions for revisions.

2 On the emergence of the concept of globalization and the debate over its origins see Michael Lang, “Globalization and its History,” *The Journal of Modern History*, vol. 78 no. 4 (December, 2006): 899-931.

3 Lang, “Globalization,” 914-24.

4 Some push the historical origins of globalization all the way back to the early sixteenth century. See, for example, Andre Gunder Frank, *ReOrient: Global Economy in the Asian Age* (Berkeley: University of California Press, 1998).

5 Mexico’s economic development, despite setbacks, has largely been successful. Mexico is a member of the Group of Twenty (G 20), which includes the world’s largest economies. In keeping with much of Latin America, Mexico’s problem is not insufficient national production, but rather inequitable distribution. As Paul Gootenberg explains, “Neither the poorest nor the most culturally divided region of the world, Latin America is by far the most unequal.” Paul Gootenberg, “Latin American Inequalities: New Perspectives from History, Politics, and Culture,” in Paul Gootenberg and Luis Reygadas, eds., *Indelible Inequalities in Latin America* (Durham: Duke University Press, 2010), 3.

6 There is extensive literature on Mexico’s and Latin America’s economic relations with advanced countries and regions. For a “dependency theory” approach see Eduardo Galeano, *The Open Veins of Latin America: Five Centuries of the Pillaging of a Continent* (25<sup>th</sup> Anniversary Edition) trans. Cedric Belfrage (New York: Monthly Review Press, 1997). For a more recent “commodity chains” approach see Steven Topik, Carlos Marichal, and Zephyr Frank, eds., *From Silver to Cocaine: Latin America Commodity Chains and Building the World Economy, 1500-2000* (Durham: Duke University Press, 2006). For a work that maintains that Latin America will become a dominant world region in the twenty-first century see Oscar Guardiola-Rivera, *What if Latin America Ruled the World? How the South will take the North through the 21<sup>st</sup> Century* (New York: Bloomsbury, 2010).

7 For an overview of the Porfirian period see Paul Garner, *Porfirio Díaz* (London: Longman, 2001).

## Special Section: Teaching and Learning the Personal and the Present in World History

- 8 On neoliberalism's continuing dominance in Mexico and Latin America today see Barbara Stallings and Wilson Peres, "Is Economic Reform Dead in Latin America? Rhetoric and Reality since 2000," *Journal of Latin American Studies* 43 (2011): 755-786. Their article provides a counterpoint to work that discusses the re-emergence of a Latin America left. See Nikolas Kozloff, *Revolution! South America and the Rise of the New Left* (New York: Palgrave, 2008).
- 9 For an overview of Latin American neoliberalism see Peter Kingstone, *The Political Economy of Latin America* (New York: Routledge, 2011). For a contemporary critique of neoliberalism see Osvaldo Sunkel, "The Unbearable Lightness of Neoliberalism in Latin America," in Charles Wood and Bryan Roberts, eds., *Rethinking Development in Latin America* (University Park: Penn State Press, 2005), 55-78.
- 10 See the discussion of 1910 Revolutionist Emiliano Zapata and Mexico's present-day "Zapatistas" below.
- 11 On the textbook controversy see Dennis Gilbert, "Rewriting History: Salinas, Zedillo and the 1992 Textbook Controversy," *Mexican Studies/Estudios Mexicanos* 13: 2 (summer 1997): 271-297.
- 12 For a study that examines the ways that historical contexts shape globalization's impact see Carol Smith, "Local History in Global Context: Social and Economic Transitions in Western Guatemala," *Comparative Studies in Society and History* 26: 2 (April, 1984): 193-228.
- 13 For a summary of foreign invasions and their global consequences see Richard Weiner "The Scramble for Mexico and Alexander von Humboldt's *Political Essay on the Kingdom of New Spain*," *World History Connected* 7: 3 (October, 2010). <<http://worldhistoryconnected.press.illinois.edu/7.3/weiner.html>>
- 14 On Latin America's nineteenth-century export boom see Steven Topic and Allen Wells, eds., *The Second Conquest of Latin America: Coffee, Henequen, and Oil during the Export Boom, 1850-1930* (Austin: University of Texas Press, 1998); and Victor Bulmer-Thomas et al., eds., *The Cambridge Economic History of Latin America*, vol. II (Cambridge: Cambridge University Press, 2006).
- 15 On early national era optimism see Richard Weiner, "Economic thought and culture in revolutionary Mexico: Carlos Díaz Dufou's Critique of the Humboldtian idea of Mexico's legendary wealth," *História e Economia* 2:1 (2<sup>nd</sup> Semestre, 2006): 13-31.
- 16 Quoted in Richard Sinkin, *The Mexican Reform, 1855-1876* (Austin: University of Texas Press, 1979), 165.
- 17 On *científicos'* ambivalence about foreign interests see Richard Weiner "Battle for Survival: Porfirian Views of the International Marketplace," *Journal of Latin American Studies* 32:2 (2000): 645-70.
- 18 This paragraph and the following one are based on Gavin O'Toole, *The Reinvention of Mexico: National Ideology in a Neoliberal Era* (Liverpool: Liverpool University Press, 2010), 103-130.
- 19 On humans' role in the construction of markets in Latin America see Steven Topik, "The Construction of Market Society in Latin America: Natural Process or Social Engineering," *Latin American Perspectives* 26:1 (January 1999): 3-21. For a broad discussion of the role states played in constructing nineteenth-century globalization see Lang, "Globalization," 915-18.
- 20 Díaz received high praise, and the world's wealthiest financiers, for example the Rothschilds, invested in Porfirian Mexico. See Steven Topik, "The Emergence of Finance Capital in Mexico," in *Five Centuries of Mexican History*, eds. Virginia Guedea and Jaime Rodríguez (Mexico and Irvine: Instituto de Investigaciones Dr. José María Luis Mora and University of California, Irvine, 1992), 227-242.
- Similarly, international business worshiped Salinas, and many predicted he would be selected as President of the World Trade Organization after his tenure as president.
- 21 The Mexican case was in keeping with broader Latin American trends. On the contrasting ways that Latin American governments constructed global ties in the nineteenth century and today see Marcello Carmagnani, *The Other West: Latin America from Invasion to Globalization*, trans. Rosanna M. Giannamico Frongia (Berkeley: University of California Press, 2011), 278-82.
- 22 O'Toole, *The Reinvention of Mexico*.
- 23 John Coatsworth, "Obstacles to Growth in nineteenth-century Mexico," *American Historical Review* 83 (February 1978): 80-100.
- 24 Carmagnani, *The Other West*, 161.
- 25 Mexico spent considerably more than other Latin American nations on a global public relations campaign to entice foreign investors. See Paolo Riguzzi, "México Prospero," *Historias* 20 (April-September, 1988): 136-57; Gene Yeager, "Mexico in the World Industrial Expositions," *The Americas* 34 (Oct., 1977): 230-43; and Mauricio Tenorio-Trillo, *Mexico at the World's Fair: Crafting a Modern Nation* (Berkeley: University of California Press, 1996).
- 26 On foreign investment see Kennett Cott, "Porfirian Investment Policies, 1876-1910," (Ph.D. diss., Albuquerque, University of New Mexico, 1978). On land policy see Robert Holden, *Mexico and the Survey of Public Lands* (Dekalb: Northern Illinois University Press, 1994). On the police force see Paul Vanderwood, *Disorder and Progress: Bandits, Police, and Mexican Development* (Lincoln: University of Nebraska Press, 1981).
- 27 On the origins of the Mexican Miracle see Susan Gauss, *Made in Mexico: Regions, Nation, and the State in the Rise of Mexican Industrialism, 1920s-1940s* (University Park, PA: Penn State University Press, 2010). For an overview of the "miracle" see Moreno-Bird and Ros, *Development and Growth in the Mexican Economy: A Historical Perspective* (Oxford: Oxford University Press, 2009), 93-123.
- 28 On Mexico's transition to neoliberalism see Sarah Babb, *Managing Mexico: Economists from Nationalism to Neoliberalism* (Princeton: Princeton University Press, 2001), 171-198; Moreno-Bird and Ros, *Development and Growth*, 176-205; and O'Toole, *Reinvention of Mexico*.
- 29 On foreign advisers' and institutions' influence on Latin American economic policy see Paul Drake, ed., *Money Doctors, Foreign Debts, and Economic Reforms in Latin America from the 1890s to the Present* (Wilmington, DE: Scholarly Resources, 1994).
- 30 Selling state industries, in some instances, has led

## Special Section: Teaching and Learning the Personal and the Present in World History

to private monopoly control rather than a competitive system. The most glaring case in point is Carlos Slim's control over the Mexican telecommunications industry. Slim is the richest man in the world today.

31 On the debate over oil privatization see Moreno-Bird and Jaime Ros, *Development and Growth*, 244-45.

32 Stephen Haber, *Industry and Underdevelopment: The Industrialization of Mexico, 1890-1940* (Stanford: Stanford University Press, 1989).

33 On *científicos'* ideas about manufacturing see Richard Weiner "Blurred Boundaries: Porfirian Mexico and the International Division of Labor," in *Explorations in Subjectivity, Borders, and Demarcations: A Fine Line*, eds. Raúl Galoppe and Richard Weiner (Lanham, MD: University Press of America, 2005), 69-87.

34 On industrial policies see Edward Beatty, *Institutions and Investment: The Political Basis of Industrialization in Mexico before 1911* (Stanford: Stanford University Press, 2001).

35 For Mexican industrialists' perspectives on de-industrialization and the dilemmas posed by economic liberalization see Judith Hellman, *Mexican Lives* (New York: New Press, 1995).

36 Moreno-Bird and Ros, *Development and Growth*, 226-230. Recently maquiladoras have been losing out to the Chinese who produce for less, which is yet another problem that plagues Mexican industry.

37 For an essay that argues that 1492 was not the watershed for indigenous people that conventional wisdom has assumed it to be see Olivia Harris, "'The Coming of the White People.' Reflections on the Mythologisation of History in Latin America," *Bulletin of Latin American Research* 14:1 (1995): 9-24.

38 European diseases killed off the majority of the natives, and many of the remaining ones were forced to convert to Catholicism, pay tribute, and work in mines and agricultural estates.

39 Emilio Kourí's study of Veracruz demonstrates this point. See *A Pueblo Divided: Business, Property, and Community in Papantla, Mexico* (Stanford: Stanford University Press, 2004).

40 The classic work on Zapata is John Womack, *Zapata and the Mexican Revolution* (New York Vintage, 1968.) A broader study on the agrarian Mexican Revolution is Alan

Knight, *The Mexican Revolution*, 2 vols. (Lincoln: University of Nebraska Press, 1990).

41 On neoliberalism in the countryside see Richard Snyder, ed., *Institutional Adaption and Innovation in Rural Mexico* (La Jolla: Center for U.S.-Mexican Studies, 1999); and Hellman, *Mexican Lives*. Several of the chapters in *Mexico in Transition: Neoliberal Globalism, the State and Civil Society* (New York: Zed Books, 2004), edited by Gerardo Otero, also examine neoliberalism's impact on rural Indians. For a discussion of Salinas' 1992 agrarian reform and its possible consequences for rural Mexico see Laura Randall, ed., *Reforming Mexico's Agrarian Reform* (London: M.E. Sharpe, 1996).

42 The group's complete name is the Zapatista Army of National Liberation (EZLN). See "The Indigenous People of Chiapas and the State in the time of Zapatismo: Remaking Culture, Renegotiating Power," *Latin American Perspectives* 28:2 (March 2001): 1-172; and John Womack, ed., *Rebellion in Chiapas: An Historical Reader* (New York: New Press, 1999). Especially see Womack's lengthy introductory essay.

43 On population growth in Mexico and Latin America see Joseph Potter and Rodolfo Tuirán Gutiérrez, "Population and Development: Then and Now," in Wood and Roberts, eds., *Rethinking Development in Latin America*, 249-68.

44 Frank Bean and Lindsay Lowell, "NAFTA and Mexican Migration," in *NAFTA's Impact on North America: The First Decade*, Sidney Weintraub, ed. (Washington, DC: CSIS Publishers, 2004), 263-284. For a historical perspective see Mark Overmyer-Velázquez, ed., *Beyond the Frontera: The History of Mexico-U.S. Migration* (Oxford: Oxford University Press, 2011).

45 Liberal opponents of the Díaz regime complained about labor coercion. See Richard Weiner, *Race Nation and Market: Economic Culture in Porfirian Mexico* (Tucson: University of Arizona Press, 2004), 85-101. John Kenneth Turner, an American who strongly critiqued Porfirian Mexico, stressed the problem of coerced labor. See his work, *Barbarous Mexico* (Austin: University of Texas Press, [1909] 1969). In the neoliberal-era, discourse has highlighted the dangers of crossing the border and the plight of undocumented workers—about 7 million Mexicans, which is an unprecedented number—in the US. On the unique problems faced by Mexican workers in the US today see Douglas Massey, "The Past and Future of Mexico-US Migration," in Overmyer-Velázquez, ed., *Beyond the Frontera*, 227-50.



World History Association

## Special Section: Teaching and Learning the Personal and the Present in World History

### Bringing *Casta* Paintings into the Classroom

Sally Stanhope  
Georgia State University

#### *Introduction: The Intersection of Identity Politics, Past and Present*

Since the age of twelve, Jose Antonio Vargas passed as American and participated fully in its society. He graduated from college and became a renowned journalist who won a Pulitzer Prize for his coverage of the Virginia Tech shootings. Now thirty, he recently disclosed he was an undocumented immigrant. He had discovered this when he tried to get a driver's license with his green card at the age of 16 and found out it was fake. According to United States law, he must go back to the Philippines and formally request admission to reside in the U.S. Many other American residents face the same paradox that Vargas does. For years, they have participated as members of American society; yet, officially the government denies their participation and contributions and often actively seeks to thwart their efforts.<sup>1</sup>

Politicians, capitalists, and others often use images of undocumented workers to contrast a lower class of unassimilable criminals who steal tax dollars for social programs and jobs with some idyllic and fictional culture of "true" Americanism.<sup>2</sup> After spending three years working at a school that serves many undocumented immigrant students, I struggle with the rhetoric and images that have created such a simplistic dichotomy of legal versus illegal immigration. My students and their families consistently fail to fit the stereotypes that the media and policymakers ascribe to undocumented immigrants. Nonetheless, the legalities and media portrayals of immigration hang over my students and me like a specter.

During the colonial era, the Spanish monarchy faced a situation in New Spain much like the United States faces today. Legally, only those of pure Spanish blood had access to the highest professions, luxury clothing, and educational and religious institutions. Others, including indigenous peoples, Africans, and those of mixed ancestry, or *castas*, had fewer privileges, paid tribute, and followed elaborate sumptuary laws. Many denizens of New Spain, however, refused to accept the limitations of their legal identity and occasionally took on another in order to improve their quality of life. Just as Vargas developed strategies to survive as an unofficial American, the *castas* of New Spain found way to navigate around laws and customs that limited their social and economic opportunities.

As an increasing number of *castas* made their way to the upper echelons of the society of New Spain through marriage, economic success, or denial of their heritage, Spanish elites reacted with panic and subterfuge. To ease their growing anxiety over the breakdown of social hierarchy and convince the metropole that New Spain functioned as an orderly society, eighteenth-century Spanish elites commissioned *casta* cycles, series of paintings that documented families of the various mixed lineages each in their appropriate economic and social niche.

The identity politics of eighteenth-century New Spain that lurk beneath the *casta* paintings touch upon many

of the issues that present-day immigration debates raise, yet they are somewhat safely entrenched in the past to view with greater objectivity and detachment. Still, *casta* paintings provide teachers an invaluable way to stimulate students to consider the breach between the media and the experiences of ordinary people. The incorporation of *casta* paintings in the secondary and undergraduate classroom exemplifies how history can prepare students to read texts critically, questioning the biases of the author, the validity of the evidence, and the potential ramifications of the discourses and politics of race and immigration in the past and the present.<sup>3</sup>

#### *Casta Paintings: A Record of the Colonial Imagination*

In 1774, Pedro Alonso O'Crouley, a rich Spanish merchant, bemoaned that "many pass as Spaniards who in their own hearts know that they are mulattos."<sup>4</sup> Most Spanish elites agreed with O'Crouley that *mulattos*, individuals of African and Spanish ancestry, as well as other *castas* had gained too much social mobility and had begun to enter professions and positions once reserved only for those of pure Spanish ancestry. Elites feared the consequences that such social mobility could produce.

Sixteenth century Spanish elites imagined and attempted to construct New Spain as a society with strict boundaries and binaries. Native nobles, *caciques*, would control the *república de indios* and the Spanish crown the *república de españoles*, which included African slaves. Colonizers planned cities with separate living areas for the Indians and the Spaniards.<sup>5</sup>

Each group, Africans, Indians, and Spanish, would fulfill specific economic roles. Africans provided manual labor for mines and plantations, served as domestic servants for Spaniards, and paid tribute under the governance of the Crown. Indians paid tribute to the Crown, produced food under the governance of the *caciques*, and provided unskilled urban labor. Spaniards filled the bureaucracies of the Church and government, owned the industries, shops, and land, controlled trade, and formed the master class of artisans. The government promulgated laws to discourage marriages between the three groups, dictate dress codes and professions appropriate for each group, and attempted to limit contact, especially miscegenation.<sup>6</sup>

However, the limited number of Spanish women and African women in Mexico led to an increasing number of *castas* that failed to fit within *república de indios* or *república de españoles*. In an attempt to control the increasing numbers of *mestizos*, individuals of Spanish and Indian ancestry, and *mulattos*, colonizers developed the *sociedad de castas* or *sistema de castas* that assigned identity to each person based on blood lineage or level of *limpieza de sangre*, "purity of blood." These social engineers hoped that all individuals of New Spain fit neatly into a hierarchy of wealth and morality that reflected the amount of Spanish blood they had gained from their parents. The government and Church created regulations that granted those of pure Spanish blood more privileges and thus reinforced the hierarchy.<sup>7</sup>

By the eighteenth century, few of the colonizers' hopes and designs had actualized. Throughout Europe, Spain had

## Special Section: Teaching and Learning the Personal and the Present in World History

gained the reputation as a backwards nation. The Black Legend that had originated in the sixteenth century to discredit Spanish claims to the Americas and strengthen the claims of the British and the Dutch gained new life when mixed with the discourse of the Enlightenment. Many non-Spanish Europeans spoke of the colonizers of New Spain as “backward, superstitious, and ill-mannered.” Spain’s dismal performance in the War of Spanish Succession (1700-1713) and the economic morass of Charles II only justified such negative views of imperial Spain.<sup>8</sup>

Faced with loss of territory, economic stagnation, and a reputation as a backwards empire of mix-raced heathens, Spain needed a publicity campaign to validate its imperial dominance and ambitions in the eyes of its competitors. *Casta* paintings proved ideal. New Spain historian Susan Dean-Smith has argued that Spanish imperialists hoped that the paintings showed that “even racially miscegenate populations might be made productive and orderly under the guiding, civilizing hand of their Spanish imperial masters.” Colonial bureaucrats and Spanish elites collected *casta* series to display not only the clear class divisions between various *castas*, but also the foodstuffs, flora and fauna, and other objects representative of the wealth of New Spain.<sup>9</sup>

*Casta* paintings depict an ordered taxonomy of classes produced from various mixtures of “Spanish,” “African,” and “Indian” blood.<sup>10</sup> Mostly painted by members of the artist guilds in New Spain, *casta* paintings usually show twelve to sixteen families presented in a predetermined order on distinct panels. Each family represents three different *castas*; two parents, each of a different *casta*, posed with their offspring of another. Inscriptions name each *casta* and occasionally identify the moral characteristics associated with the *casta* of the child.<sup>11</sup>

Many historians interpret each *casta* as a distinct racial category, yet *casta* referred to far more than race. Even though skin complexion, hair texture, and eye color served as overt symbols of one’s *casta*, social standing, heritage, and economic position carried equal if not greater weight than appearance in the process of identification. Thus, *calidad* offers a more accurate portrayal of what *casta* meant during the seventeenth and eighteenth centuries. According to Magali Marie Carrera, “*Calidad* represented one’s social body as a whole, which included references to skin color but often also encompassed, more importantly, occupation, wealth, purity of blood, honor, integrity, and place of origin.” In the *casta* paintings and in the minds of Spanish elites the *calidad* of *castas* should be the antithesis of that of a Spaniard. While Spanish characteristics included wealth, nobility, legitimacy, pure bloodlines, and honor, *casta* characteristics were impure blood, illegitimacy, poverty, manual labor, criminality, and immorality.<sup>12</sup>

The first vignettes of most *casta* cycles present what colonial society and the metropole considered the purest bloodlines of impeccable *calidad*: Spanish and Indian. These *mestizaje* (mixed) families wear sumptuous clothing and often appear with props that indicate a life of leisure or an occupation of high status. Spanish and black family sets follow, then Indian and black. The last *casta* cycles usually represented unassimilated Indians. Clothing, body language, and background indicate that as families become more racially mixed with less or no Spanish heritage their social and economic status drop accordingly.<sup>13</sup>

During the late 17<sup>th</sup> and 18<sup>th</sup> century, many colonizers believed *calidad* could be discerned with diagnostic strategies from physiognomics, a new “science” that used an individual’s outward appearance to discern the content of his inner character.<sup>14</sup> *Casta* paintings, especially those produced after 1750, remind the male viewer of the futility of physiognomics and the danger of coupling with a woman who had any African ancestry no matter how Spanish she appeared. While a *mestiza*, a woman of Spanish and Indian ancestry, could have a grandchild of pure Spanish blood within two generations, African heritage, no matter how distant, precluded a woman from bearing children of pure Spanish lineage.<sup>15</sup>

This means an *albino*, the child of a Spaniard and *morisco*, a person of distant African ancestry, appeared white but did not have legal access to the privileges and opportunities reserved for Spaniards. In *casta* paintings, Spanish men who marry *albinas*, white women with African ancestry, spawn offspring labeled *torna atras*, or return-backwards. The name of the child’s *casta* emphasizes the lesser social status and impure nature that any amount of African ancestry brought.<sup>16</sup>

A few *casta* cycles include one violent scene where the husband or wife of African heritage, usually the wife, attacks the other. Katzew explains, “The incorporation of this type of [violent] scene in a number of *casta* sets serves to highlight the positive traits associated with mixtures that excluded Blacks, which bore the promise of a return to a pure racial pole.” Far more common, artists used covert means, torn clothing, tools needed for manual labor, or engagement in labor to point out the degenerated nature and lower social status of more racially-mixed families and to warn Spanish men from weakening their bloodlines.<sup>17</sup>

While *casta* paintings reminded the Spanish male of the dangers of mixed race unions, they simultaneously revered his power and virility. Most *casta* cycles pose a Spanish man with a wife of mixed ancestry. The Spanish man represents “the Edenic ideal” and omnipotent authority figure. As the patriarch of the *casta* family, Spanish men commanded the sexuality of all women and thus emasculated other men. Martínez describes, “Sexual subordination essentially functions as a metaphor for colonial domination.” The *casta* genre asserts that Spanish blood, represented in the body of the Spanish male, offers redemption only to those of Indian descent; those of African descent can never be redeemed from their impurity.<sup>18</sup>

Many *castas* refused to accept the *calidad* and appellations that *casta* paintings depicted. Herman Bennett, a scholar of Afro-Mexico, shows that *mulattos*, who colonial elites assumed illegitimate and dishonorable, used ecclesiastic institutions to assert their legitimacy. Historian Patricia Seed’s study of the Mexico City census of 1753 confirms that *castas* took on elite positions once reserved for Spaniards. Some *mulattos* became officers of segregated militia units. *Castas* with Indian ancestry formed the lower rungs of the religious and civil bureaucracies. A significant number of all *castas* entered the artisan class.<sup>19</sup>

Because one’s appearance did not faithfully represent a person’s lineage, many individuals used legal, economic, and social channels to change the *casta* designation assigned to them

## Special Section: Teaching and Learning the Personal and the Present in World History

at birth. Economic expansion prompted by the Bourbon Reforms passed during the second half of the eighteenth century allowed some families from even the lower *castas* to gain enough wealth to emulate the lifestyles legally reserved for the Spanish. By the late eighteenth century various *castas* had gained access to educational institutions and ecclesiastical posts even though formal statutes barred their entry.<sup>20</sup>

The Crown developed numerous methods to facilitate individual social mobility. Archival records show that individuals used the court system to change their *casta* designation. In fact, many of the artists who produced *casta* paintings were either *mulatto* or *mestizo*, yet eventually became classified as Spanish on the census. Others simply changed their labels in official documents to better reflect their economic status.<sup>21</sup>

Demographic evidence and material evidence demonstrate that the elites of New Spain also transgressed the strict divisions they professed as necessary to separate the *castas* and Spanish. Ecclesiastical records show that Spaniards often interacted in the same social space as *mestizos* and *mulattos*. By the end of the eighteenth century, the number of Spaniards who married *mulattas*, *mestizas*, or *castizas* had increased significantly.<sup>22</sup>

Though Charles III attempted to curb “unequal marriages” with the Real Pragmática of 1776, the law had little effect on marriage patterns. In 1804, the Crown again unsuccessfully tried to prevent marriages between those of pure Spanish blood and those of mixed ancestry. Clearly, even though Spanish colonial elites complained that those of the lower *castas* too often pursued a social status and profession inappropriate of their class and *calidad*, they themselves facilitated this process as they chose to patronize the businesses and marry individuals of mixed descent.<sup>23</sup>

*Casta* paintings depicted the imaginings of the metropole and colonial elite and held little meaning to most of the denizens of New Spain. During the eighteenth century, artists, patrons, and viewers rarely identified these painting as *casta* paintings, considered them less important than portraiture and religious paintings, and did not hold them to the orthodox prescriptions of the Inquisition or the artist guilds. After Mexican independence in 1821, artists no longer produced *casta* paintings, but they remained popular in Europe as idealized representations of colonial order.<sup>24</sup>

### Teaching and Historiographic Debates

Because “historical fundamentalism” imbues secondary curricula, secondary and even college-level teachers often avoid scholarly debates in the classroom. The result, explains Robert Berkhofer, who has written extensively on pedagogy, is that most students end up viewing “their assigned readings and textbooks, if not their teachers, as divinely inspired.” Discussions based on excerpts from the historiography of *casta* paintings are provoking ways to start to break students’ habit of viewing textbooks and depictions of historical events as objective and true.<sup>25</sup>

In the last two decades *casta* paintings have become a topic of interest for scholars. In 1989, art historian María Concepción García Sáiz published a groundbreaking study of fifty-nine sets of *casta* paintings from both private and public

collections. She documents the evolution of *casta* paintings over the eighteenth century and asserts that colonial aristocrats and European elites were the primary audience for such paintings as they saw the images as objects of curiosity far removed from their own lives.<sup>26</sup>

Ilona Katzew, associate curator of Latin American art at the Los Angeles County Museum of Art, has published multiple studies that argue that *casta* paintings served to quell the social anxiety of elites who viewed the increasing social mobility of *castas* as a threat to social order. Furthermore, according to Katzew, the objects, clothing, and backgrounds of *casta* paintings emphasize the wealth of the colony and the social status of the individuals depicted.<sup>27</sup>

In *Imagining Identity in New Spain*, Magali Marie Carrera, an expert on the visual culture of colonial Mexico, examines the evolution of *casta* paintings over the eighteenth century as a reflection of the increasing renovations and regulations that Spain attempted to institute in its colonies. *Casta* paintings, according to Carrera, became a strategy of colonial surveillance and control that ordered colonial bodies into spaces, professions, and clothing appropriate to their *calidad*.<sup>28</sup>

Susan Deans-Smith explores audience reception. She confirms that colonial bureaucrats, Spanish elites, and clergy collected *casta* paintings in order to advertise the wealth and order of the Empire as well as the patron’s enlightened sensibilities. Patrons rarely displayed *casta* paintings in New Spain. In Europe, the public could view sets of *casta* paintings on display at the *Gabinete de Historia Natural* in Madrid, a royally patronized institute of scientific learning that exhibited plant and animal specimens and objects d’art. Europeans would have also seen versions of *casta* paintings as illustrations in books.<sup>29</sup>

Diana DiPaolo Loren, an archeologist, has used material evidence gathered from Los Adaes, an outpost of 18<sup>th</sup> century New Spain that now sits in present day Texas, to prove that the clear-cut categories portrayed in *casta* paintings were a prescriptive myth of the colonizers that had little bearing to the daily realities of the colonized. In *casta* paintings, each individual dresses appropriate to his or her *calidad*. Artifacts suggest that Spaniards, *castas*, and Indians regularly broke sumptuary laws. Spaniards dressed down often incorporating indigenous styles such as glass and seed beads while *castas* often dressed above their station wearing silk and belt buckles.<sup>30</sup>

Most recently, in 2009, Evelina Guzauskyte, an expert in colonial Latin American literature, reexamined *casta* cycles with violent imagery and asserts, “gender, rather than race or *casta*, is viewed as an element destructive of the peace of everyday life.” She contrasts *casta* paintings to periodicals, literary works, Inquisition records, and civil records and concludes that the majority of *casta* cycles, idyllic visions of *mestizaje*, fail to correspond to the realities revealed in written records. She explains, “Though they are fewer in number than the peaceful images, the violent *casta* paintings offer an altogether more realistic and more accurate picture of New Spain Society.”<sup>31</sup>

### Teaching Strategies for *Casta* Paintings

The popularity of *casta* paintings across disciplines within the academy makes them an ideal teaching tool in the

## Special Section: Teaching and Learning the Personal and the Present in World History

secondary classroom. Too often teachers neglect to integrate primary sources into the classroom. Consequently, many students learn history as a singular linear teleology of facts and dates centered on the nation-state. When reading texts, students often take its claims and conclusions at face value rather than consider the research, selection, analysis, and interpretation behind various historical accounts. *Casta* paintings provide an ideal method to demonstrate the difference between history “as a past event and history as an interpretive account” because students, regardless of their reading level, can critically consider the validity and purpose of the paintings. Moreover, *casta* paintings fit within both the American and World History curricula and connect with real issues that American students face today.<sup>32</sup>

Figure 5, *Casta Painting* of 1750, provides a captivating way to hook students’ attention. Before teachers review the necessary background information and model strategies of analysis, students should interpret what they see. Then, students should read Appendix III, an excerpt from Pedro Alonso O’Crouley’s *Idea compendiosa del reyno Nuevas España* and look over Appendix V, one version of the many *sistema de castas*.<sup>33</sup>

With *Casta Painting* of 1750 as the focal point, the teacher can model for students how to analyze the painting as a historical document, compare it to O’Crouley’s account, and contextualize the painting within regional and global trends and events.<sup>34</sup> Then, students can form groups, discuss a different *casta* painting, and independently complete an analysis guide. Finally, the class can come back together to consider the discussion questions provided in Appendix IV. For a follow up activity, students can choose one person within a *casta* painting and create a story of that individual’s life that integrates the demographic and economic realities of New Spain or draft an analytical essay from their completed Primary Source Analysis Guide. Of course teachers should adapt the appendices and suggested activities to the culture of their classroom and particular curricular content.

*Casta* paintings are an ideal way to globalize American History, incorporate primary materials, study race as a social construct that changes according to period and location, localize World History, gain insight into present-day debates, and incorporate historical thinking into the secondary classroom. Educational psychologist Samuel Wineburg contends that “school history must move from a context variable, peripheral to the topic being investigated, to a site of inquiry in its own right, a place to explore the complex cognitive processes we use to discern pattern and significance in the past.”<sup>35</sup> *Casta* paintings push students to consider the subtexts of historical records and the disconnect between what may have actually happened in the past and how contemporaries recorded and constructed meaning from those events and processes.

As O’Crouley and other elites observed, the clearly-defined hierarchies and loyal docile subjects depicted in *casta* paintings held little semblance to the social realities of New Spain. Material culture, civil court proceedings, census records, and ecclesiastical records reveal the porosity between *castas* within New Spain and the fiction *casta* paintings captured. Just as Vargas passed as an American in order to pursue an education

and career in journalism, denizens of New Spain transgressed the boundaries of their *casta* to improve their quality of life.<sup>36</sup>

### Notes:

- 1 Jose Antonio Vargas, “My Life as an Undocumented Immigrant,” *New York Times Sunday Magazine*, June 22, 2011.
- 2 Leo R. Chavez, *The Latino Threat: Constructing Immigrants, Citizens, and the Nation* (Stanford, CA: Stanford University Press, 2008), 21-44.
- 3 Samuel S. Wineburg, “On the Reading of Historical Texts; Notes on the Breach between School and Academy,” *American Educational Research Journal* 28, no. 3 (1991): 518. Wineburg explains they everyone must be an historian: “We are all called on to engage in historical thinking-called on to see human motive in the texts we read; called on to mine truth from the quicksand of innuendo, half-truth, and falsehood that seeks to engulf us each day; called on to brave the fact that certainty, at least in understanding the social world, remains elusive and beyond our grasp.”
- 4 Pedro Alonso O’Crouley, *Idea compendiosa del reyno Nuevas España* (A Description of the Kingdom of New Spain) 1774, translated and edited by Sean Galvin (San Francisco: John Howell Books, 1972), 21.
- 5 Ilona Katzew, *Casta Painting: Images of Race in Eighteenth-Century Mexico* (New Haven: Yale University Press, 2004), 40; J. Jorge Klor De Alva, “Mestizaje from New Spain to Aztlán: On the Control and Classification of Collective Identities,” in *New World Orders: Casta Painting and Colonial Latin America*, ed. Katzew (New York: Americas Society, 1996): 65. We would also like to thank the Americas Society for their kind permission to reprint the images included in this essay and the appendix.
- 6 Magali Marie Carrera, *Imagining Identity in New Spain: Race, Lineage, and the Colonial Body in Portraiture and Casta Paintings* (Austin: University of Texas Press, 2003), 4, 41; Patricia Seed, “Social Dimensions of Race: Mexico City, 1753,” *The Hispanic American Historical Review* 62, no. 4 (Nov. 1982): 569, 582; Carrera, 118-121; Katzew, *Casta Painting*, 40; Alva, 65.
- 7 Katzew, *Casta Painting*, 40-41; Herman L. Bennett, *Colonial Blackness: A History of Afro-Mexico* (Bloomington: Indiana University Press, 2009), 162; Carrera, 34-37; María Elena Martínez, *Genealogical Fictions: Limpieza De Sangre, Religion, and Gender in Colonial Mexico* (Stanford: Stanford University Press, 2008), 1-16; Bennett, 212. Bennett shows that the shortage of African women led many black male slaves to engage in sexual relations with Indian women. Because the mother’s status determines her child’s, Indian women, who were free, gave birth to free children, which increased the number of freemen. By the end of the eighteenth century, 25% of the population of Mexico fit in the *casta* category, and therefore, according to the ideology of the *sistema de castas* they had lesser *calidad* than Spaniards or Indians.
- 8 Carrera, 32; Martínez, 8-11; Susan Dean-Smith, “Creating the Colonial Subject: *Casta* Paintings, Collectors, and Critics in Eighteenth-Century Mexico and Spain,” *Colonial*

## Special Section: Teaching and Learning the Personal and the Present in World History

*Latin American Review* 14, no. 2 (December 2005): 176. Many European scholars commented on the degeneration of Spanish society and race. Examples include Montesquieu's *Lettres persanes* (1721) and Buffon's *Histoire naturelle* (1749). European elites supported the sentiments of such well-known scholars. In 1774, Edward Long, an Englishman described, "Let any man turn his eyes to the Spanish American dominions, and behold what a vicious, brutal, and degenerate breed of mongrels has been there produced, between Spaniards, Blacks, Indians, and their mixed progeny."<sup>9</sup>

9 Dean-Smith, 176; Ilona Katzew, "Casta Paintings: Identity and Social Stratification in Colonial Mexico," in *New World Orders: Casta Painting and Colonial Latin America*, ed. Katzew (New York: Americas Society, 1996), 9, 21-23.

10 Diana DiPaolo Loren, "Corporeal Concerns: Eighteenth-Century *Casta* Paintings and Colonial Bodies in Spanish Texas." *Historical Archaeology* 41, no. 1 (2007): 23; Patrick Manning, *The African Diaspora: A History Through Culture* (Oxford University Press, 2007), 139; Romero de Tejada y Pilar Picatoste, *Frutas y castas ilustradas* (Madrid: Ministerio de Educación, Cultura y Deporte, Secretaría de Estado de Cultura, 2003), 13; Katzew, *Casta Painting*, 15; Katzew, *New World Orders*, 6. Nearly all *casta* paintings originated in New Spain. There is one known Peruvian set of *casta* paintings that the Viceroy of Lima sent to the Charles IV in 1770. There have been a few sets from Bolivia and Ecuador. Because the vast majority of *casta* paintings come from New Spain, historians consider the paintings in the context of the society of New Spain.

11 Katzew, *Casta Painting*, 69; Carrera, 36-37, 48; Evelina Guzauskyte, "Fragmented Borders, Fallen Men, Bestial Women: Violence in the *Casta* Paintings of Eighteenth-century New Spain," *Bulletin of Spanish Studies* LXXXVI, no. 2 (2009): 177; Guzauskyte, 186. See Appendix V. Drawing from the nomenclature of plants and animals, colonizers developed a taxonomy based on Spanish conceptions of lineage. Originally, Guzauskyte explains, "It seemed possible to organize and present the races in the series of *casta* paintings in ways similar to those in which plants and animals were organized and presented in museums, encyclopaedias and bestiaries."

12 Katzew, *Casta Painting*, 44-45, 57; Guzauskyte, 186; Martínez, 11-13, 247; Katzew, *New World Orders*, 12; Carrera, 6, 37; O'Crouley, 20-21; Dean Smith, 181. Because race shifts meaning across cultures and periods, historians disagree whether the term race can be applied to periods prior to the nineteenth century. Before the nineteenth century, the concept of race lacked the biological connotations it took on during nineteenth century and still holds today. Thus many scholars like Carrera contend that the term race fails to capture the historically specific conceptions that race held during different historical periods and cultures. Other historians like Martínez believe that race adequately captures its various historical manifestations and simultaneously emphasizes the constructed nature of racial discourse.

13 See Figure 3, 5, 12; Katzew, *New World Orders*, 9, 25; Jose F. Buscaglia-Salgado, *Undoing Empire: Race and Nation in the Mulatto Caribbean* (Minneapolis: University of Minnesota Press, 2003), 173; Guzauskyte, 177-178, 184-185;

Carrera, 68; Carrera demonstrates that artists in the second half of the eighteenth century developed more complex backgrounds and scenes in *casta* painting that overtly indicates the *calidad* of the subjects. In order to emphasize the aberrant nature of *casta* women, artists began to include one violent *casta* scene. Guzauskyte has uncovered twenty four sets of *casta* paintings that contain a violent scene out of a survey of one hundred *casta* paintings not only from New Spain, but also from Ecuador, Peru, and Bolivia. See Figures 4-6, 11-16.

14 Carrera, 9.

15 Martínez, 235; Carrera, 83; Guzauskyte, 186-187. See Figures 2, 4-7, 9-12, 14, 17 & Appendix V. If a *mestiza* mated with a man of Indian, African, or *casta* ancestry she would produce children of degenerate *calidad* often with darker skin. Many of the *casta* appellations of these mixtures suggested the lesser social status. Some like *lobo* (wolf), *coyote*, and *mulatto* (mule) referred to animals; others, like *no te entiendo* (I don't understand you), *torna atras* (return-backwards) and *tiente en el aire* (tempting the air), emphasize the impure nature of the *casta*. Thus, those with Indian heritage had the potential to produce pure Spanish descendants.

16 Martínez, 233, 249; Katzew, *Casta Painting*, 49; Guzauskyte, 187-188. See Figures 9, 13, 14. Katzew labels the process where Indian and Spanish mixtures eventually resulted in a child of pure Spanish blood "blood mending." See Figure 10.

17 Katzew, *New World Orders*, 114-115; Carrera, 87 Guzauskyte, 179, 189. Guzauskyte contest Katzew's conclusion and suggest that most of the violent *casta* paintings intend to show the danger of women rather than a specific race. Nonetheless, Guzauskyte's evidence backs Katzew's assertion. Out of the twenty-four violent *casta* scenes, twenty include an individual with African heritage. Eight of the twenty-four show the man attacking the woman; eight depict mutual violence. Nine show a woman beating the man.

18 Martínez, 233, 235.

19 Martínez, 238; Katzew, *Casta Painting*, 42; Bennett, 184, 215; Seed, 579-582, 587-588. Seed specifies, "Substantial numbers of *castizos*, *mestizos*, and *mulattoes* were artisans: 72 percent of the *castizos*, 54 percent of the *mestizos*, and 43.6 percent of the *mulattoes*." Even though *castas* could improve their economic and social position, it was very difficult. *Castas* of African ancestry faced the greatest number of obstacles to social mobility; according to the census, 50% worked as servants. Women and girls had less opportunity to escape the economic niche assigned to their *casta*; most worked as domestic servants.

20 Katzew, *Casta Painting*, 45; Seed, 591; Carrera, 41; Loren, 23-36; Carrera, 41; Katzew, *Casta Painting*, 56; Bennett, 184, 186, 211-212. Bennett criticizes historians who focus only on the social mobility of various *castas*: "Scholars of colonial Mexico have focused narrowly on upward social mobility and framed their eighteenth century social history exclusively in relation to the Bourbon Reforms; this perspective loses sight of how mulattos, like the other segments of New Spain's population, channeled their experiences and history through their private lives. Thus, he warns, "It would be misleading, however, to conclude that mulattos merely replicated the elite culture of honor. Since their ancestors had been denied honor, eighteenth

## Special Section: Teaching and Learning the Personal and the Present in World History

century mulattos manifested novel and therefore modified social practices.”

21

George Reid Andrews, *Afro-Latin America, 1800-2000* (Oxford: Oxford University Press, 2004), 47-49; Guzauskyte, 177; Katzew, *Casta Painting*, 202; Seed, 597-598 Even before the Crown legalized the purchase of *gracias al sacar*, a formal certificate that granted the privileges reserved for Spaniards to *casta* personages, in 1795, many non-Spaniards successfully petitioned to the king or the viceroyalty for the privileges reserved for the Spanish. An attorney in 1770 complained, “the liberty in which the plebs have been allowed to choose the [racial] class they prefer ... They often join one or the other as it suits them or a they need to ... A Mulatto, for instance, whose color helps him somewhat to hide in another caste says, according to his whims, that he is Indian to enjoy the privileges as such and pay less tribute ... or, more frequently, that he is Spaniard, Castizo, or Mestizo, and then does not pay any [tribute] at all.”

22 Carrera, 37, 39-41; Bennett, 188, 195, 200 208; Seed, 595. Occasionally, when Spaniards married *castas* marriage registers would redefine the Spaniard as a *casta*. Seed discovered this trend by comparing the census of 1753 to a marriage registry from the parish of Sagrario of 1752-53. She finds, “Spanish elite prejudices about the marriage of light men and dark women and about the socioracial identity of the criminal element altered the usual upward tendency of racial classification in marriage registers.”

23 Carrera, 118; Bennett, 19, 202. Bennett explains, “Designed to stave off “unequal” unions among distinct castes, the Pragmatic granted parents the authority to challenge the marital selection of their children...By instilling the decree, Bourbon policymakers signaled their concurrence with the sentiments of elite Spanish settlers that unbridled freedom constituted a threat to the social order.”

24 Katzew, *Casta Painting*, 9 Martinez, 256; Katzew, *New World Orders*, 17; Dean-Smith, 169, 192; Carrera, 48-49, 54. In 1822, the Mexican government banned *casta* designations, and the 1824 Mexican constitution declared that all citizens were equal.

25 Robert F. Berkhofer, Jr., “Demystifying Historical Authority: Critical Textual Analysis in the Classroom,” *Perspectives: Newsletter of the American Historical Association* (February 1988): 13-16; Wineburg, 512-513. Students may read excerpts of Guzauskyte that explore the differing historical views towards violence in *casta* paintings and then discuss the merits of each perspective (See Appendix VI). Excerpts from Susan Deans-Smith’s article can help students connect the European Enlightenment to the building of empires and the growth of capitalism (See Appendix VII).

26 Katzew, *Casta Painting*, 7-8; Carrera, 50-51; María Concepción García Sáiz, *The Castes: A Genre of Mexican Painting = Las Castas Mexicanas: Un Género Pictórico Americano* (Olivetti, 1989). In addition, to the outpouring of scholarship from scholars based in the United States, there have been many studies published in Spanish that have not yet been translated. See *Frutas y castas ilustradas*, a catalogue compiled

and published by the Museo Nacional de Antropología (Madrid: Ministerio de Educación, Cultura y Deportes, 2004) and Elena Isabel Estrada de Gerlero *El arte y la vida cotidiana: XVI Coloquio Internacional de Historia del Arte* (México: Univ. Nacional Autónoma Inst. de Investigaciones Estéticas, 1995). Gerlero links *casta* paintings to the *Relaciones geográficas*, questionnaires issued by the Council of the Indies in order to gather information on the colonies of México. Katzew challenges Gerlero’s thesis: “There is no evidence that the large corpus of *casta* paintings remotely responded to the requests of Relaciones geográficas.”

27 Katzew, *New World Orders; Casta Painting*; Carrera, 51-52; Abby Sue Fisher, *Mestizaje and the Cuadros De Castas: Visual Representations of Race, Status, and Dress in Eighteenth Century Mexico*, (Ph. D Thesis, University of Minnesota, 1992). Even before Katzew’s seminal study, Abby Sue Fisher wrote a dissertation that examines how clothing emphasized the *calidad* of each individual in the *casta* paintings.

28 Carrera.

29 Dean Smith, 169-204; O’Crouley, 18-19.

30 Loren, 23-36.

31 Guzauskyte, 192.

32 Wineburg, 500, 519; Robert Bain, “Into the Breach: Using Research and Theory to Shape History Instruction.” *Journal of Education* 189, no. ½ (2008/2009): 160. Wineburg explains, “Texts come not to convey information, to tell stories, or even to set the record straight. Instead, they are slippery, cagey, and protean, and reflect the uncertainty and disingenuity of the real world. Texts emerge as ‘speech acts,’ social interactions set down on paper that can be understood only by trying to reconstruct the social context in which they occurred. The comprehension of text reaches beyond words and phrases to embrace intention, motive, purpose, and plan—the same set of concepts we use to decipher human action.” He concludes, “Language is not a garden tool for acting on inanimate objects but a medium for swaying minds and changing opinions, for rousing passions or allaying them.”

33 Frederick Drake and Sarah Drake Brown, “A Systematic Approach to Improve Students’ Historical Thinking,” *The History Teacher* 36, 4 (August 2003). <http://www.historycooperative.org/journals/ht/36.4/drake.html> (Accessed June 28, 2011); Andrews, 48-49; Carrera, 36-37, 147; Guzauskyte, 186-188; Edward R. Slack, “The Chinos in New Spain: A Corrective Lens for a Distorted Image,” *Journal of World History* 20, no. 1 (March 2009): 58. See Appendix I & II. Students can complete most of the question number 2 asks without background information.

34 See Appendix I.

35 Wineburg, 518.

36 Katzew, *Casta Painting*, 44-45, 57.

## Special Section: Teaching and Learning the Personal and the Present in World History

### Figures

1. Ramón Torres, 1770-1780. *Spaniard and Morisca Makes Albino/ De español y morisca, sale albino*. Oil on copper, 32 x 42.5 cm. [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



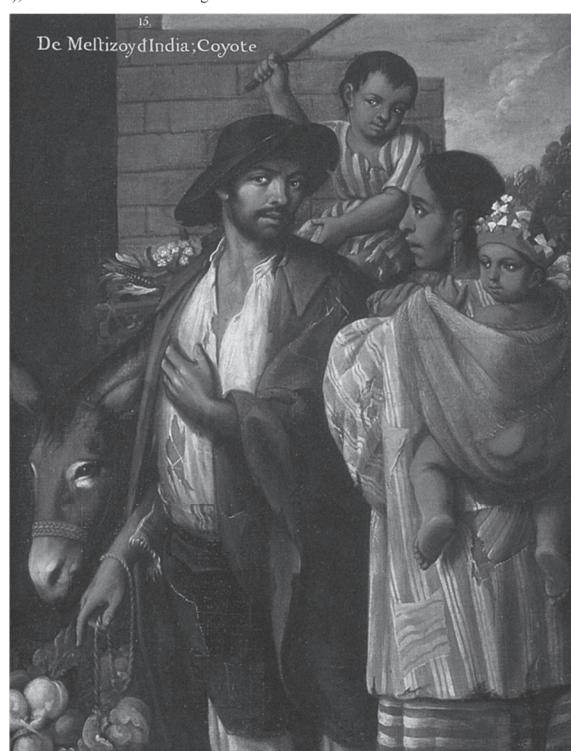
3. Juan Rodríguez Juárez, 1715. *Spaniard and Indian Produce a Mestizo/ De Espanol y de india, produce mestizo*. Oil on canvas, 104.1 x 147 cm. [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



2. José de Ibarra, 1725. *From Black and Indian, Wolf/ De negro y india, lobo*. Oil on canvas, 164 x 91 cm. [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



4. Miguel Cabrera, 1763. *From Mestizo and Indian, Coyote/ De mestizo y de india, coyote*. Oil on canvas, 132 x 102.9 cm. [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



## Special Section: Teaching and Learning the Personal and the Present in World History

5. *Casta Painting*, 1750. Oil on canvas, 67 x 56.2 cm. [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



6. Francisco Clapera, 1785. From *Mulatto and Spaniard, Morisco/ De mulato y española, morisco*. Oil on canvas, 54 x 40.5 cm, Denver Art Museum [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



7. Jose Buenaventura Guiol, 1770-1780. From *Spaniard and Castiza, a Spaniard is Born/ De español y castiza nace española*. Oil on canvas, 71.5 x 50.5 cm, [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



8. Jose Buenaventura Guiol, 1770-1780. From *Spaniard and Indian, a Mestiza is Born/ De español y india nace mestiza*. Oil on canvas, 71.5 x 50.5 cm [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



## Special Section: Teaching and Learning the Personal and the Present in World History

9. José de Paez, 1770-1780. *From Spaniard and Albino, Return-Backwards/ De español y albina, torna atrás*. Oil on copper, 50.2 x 63.8 cm [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



10. José de Paez, 1770-1780. *From Spaniard and Morisca, Albino/ De español y morisca, albino*. Oil on copper, 50.2 x 63.8 cm, [database on-line] (ARTstor, accessed 21 July 2011); available at [www.artstor.org](http://www.artstor.org).



11. *Caste: From Albino and Spaniard, a Return-Backwards is Born/ De Albina y Espanol Nace Tornatas*, 1790. Oil on canvas 62.6 x 83.2cm from Katzew, Ilona, *New World Orders, Casta Painting Colonial Latin America* (New York: Americas Society, 1996), pl. 52.



12. *Caste: From Spaniard and Black, a Mulatto is Born/ De Espanol y Negra Nace Mulato*, 1790. Oil on canvas, 62.6 x 83.2cm from Katzew, Ilona, *New World Orders, Casta Painting Colonial Latin America* (New York: Americas Society, 1996), pl.49.



**Special Section: Teaching and Learning the Personal and the Present in World History**

13. *Caste: From Spaniard and Albino, Return-Backwards*, 1780. Oil on canvas, 58 x 75cm from Katzew, Ilona, *New World Orders, Casta Painting Colonial Latin America* (New York: Americas Society, 1996), pl. 28.



14. *Caste: From Albino and Spaniard, a Return-Backwards is Born/ De Albina y Espanol Nace Tornatas* 1790. Oil on canvas, 62.6 x 83, from Katzew, Ilona, *New World Orders, Casta Painting Colonial Latin America* (New York: Americas Society, 1996), pl. 52.



15. Jose de Bustos, 1725. *Caste: From Indian and Wolf-Return- Backwards, Wolf Again De Indio y Lobo Torna Atras, Lobo otra vez*. Oil on canvas from Katzew, Ilona, *New World Orders, Casta Painting Colonial Latin America* (New York: Americas Society, 1996), pl. 6.



16. De Espanol y Negra, Mulato.



16. *Caste: From Spaniard and Black, Mulatto/ De Espanol y Negro, Mulato*. 1760-70. Oil on canvas 78.8 x 97.2cm from Katzew, Ilona, *New World Orders, Casta Painting Colonial Latin America* (New York: Americas Society, 1996), pl.12.

## Special Section: Teaching and Learning the Personal and the Present in World History

17. Caste: From Albarazada and Mulatto, a Barcino is Born/ De Albarazada and Mulatto Nace Barcino, 1790. Oil on canvas. 62.6 x 83.2cm from Katzew, Ilona, *New World Orders, Casta Painting Colonial Latin America* (New York: Americas Society, 1996), pl. 56.



18. Caste: From Barcino and Wolf, a Coyote is Born/ De Barsino y Lova Nace Coyote, 1790. 62.6 x 83.2cm from Katzew, Ilona, *New World Orders, Casta Painting Colonial Latin America* (New York: Americas Society, 1996), pl. 57.



**Appendix I: Example of Primary Source Analysis Guide to Historical Thinking: Images** (adapted from Figure 2 of Frederick Drake and Sarah Drake Brown, “A Systematic Approach to Improve Students’ Historical Thinking.”)

### 1. Identify the Document

*Artist (if known):* Unknown

*Title:* Casta Painting

*Date:* 1750

*Attributes of Document (medium, size, numbers of panels):* Oil on canvas, 67 x 56.2 cm. one panel

### 2. Analyze the Source

*Main idea of the source:* As O’Crouley and other elites observed, the clearly defined hierarchies and loyal docile subjects depicted in *casta* paintings held little semblance to the social realities of New Spain.<sup>1</sup> Material culture, civil court proceedings, census records, and ecclesiastical records reveal the porosity between *castas* within New Spain and the fiction captured in *casta* paintings.

*What people or objects do you see in the image?* Family sets separated by small frames labeled and numbered beneath in Spanish. Number eight shows the father threatening to beat his son. The father in number 11 hides a hook from his son and wife. In number 12, the father drinks. Material wealth descends as the eyes move down the painting. In the top register, each family member wears an elaborate outfit and carries decorative props. In number 1, the father carries an instrument and the mother a blossoming flower. In number 3 the man holds a gold box and the woman a jeweled sword. In 4, the mother holds a lace handkerchief. The poorest families are those on the bottom register. These families are engaged in work and wear simple clothing without shoes. In number 15, the child is naked.

*What are people, if anything, doing in this image?* The first four families pose dressed well and standing in nondescript locales. The artist portrays the families following the first four engaged in action. In number 5-8, the artist portrays a domestic moment of tenderness or brutality. For example in number 5, it seems the father has just stopped sweeping in order to hand his son some sort of tool. The mother looks as if she is about to take the broom from her husband. The tone of number 8, is far more sinister. In the bottom register, the families engage in some sort of economic activity that they can profit from. In number 14, the mother sews and the father comforts the child in a room filled with hay.

*Who do you think these people could be?* Idealized denizens of New Spain

*What does this image tell you about ways of living?* People dressed according to their status and culture. In number 1, the mother mixes Indian and Spanish fashions. Women of mixed ancestry were more likely to adopt European dress than men of mixed ancestry.

*When do you think this image was created?* In 1750, the Spanish Crown no longer carried the reputation of the most powerful empire. In fact, many Europeans believed that Spain had lost authority over its people and did not have the capability to rebound. The theories of the Enlightenment had become trendy across Europe and stimulated the Spanish Crown to implement reform in the metropole and colonies.

*Why do you think this image was created?* It displays the diversity of New Spain strictly divided into neat, self-contained boxes and denied the reality that few denizens of New Spain followed legal and governmental regulations that enforced the *sistema de castas*.

## Special Section: Teaching and Learning the Personal and the Present in World History

*Preceding conditions that motivated the producer of the image:*  
By 1750, casta paintings had become popular in the metropole and among the elite in New Spain.

*Intended audience and purpose:* Intended for elite male viewers, the painting celebrates the power of Spanish domination, yet also warns of the danger of further diluting of Spanish bloodlines. In Europe, the patrons often kept castas paintings in curiosity cabinets along with other oddities they collected from around the world.

*Relationship to other sources:* Written just twenty-four years after this painting was produced, O'Crouley's descriptions differ considerably from the neat taxonomy presented by the vignettes. First, O'Crouley records a different *sistema de casta* than the one that the painter followed. Second, O'Crouley suggests that many of those of mixed ancestry passed as Spaniards. In Casta Painting, each individual is labeled and confined to his or her *casta*; clothing, gestures, and props hint at the *calidad* of each *casta*.

*Biases of image's producer:* The artist most likely produced this for an elite male patron who wanted to believe that New Spain was an ordered fixed society where the Spanish male would always be on top with those of mixed ancestry under his command. Most artists were of mixed ancestry. Some of the artists who became prominent escaped the casta designation and legally became Spanish. Because artist guilds held no authority over artistic depictions of secular subjects, unexamined artists outside the guild system created casta paintings as well as prominent artist.

*Questions to ask the image's producer:* What *casta* do you identify as? What prompted you to produce this painting? Are you a member of an artist guild?

### 3. Historical Context

*Important people, events, and ideas at the time of the images creation*

*Local/Regional: people, events, and ideas of the time*

- Increasing marriages between Spaniards and *castas*
- Bourbon reforms
- Economic and social mobility of *castas*
- Rising anxiety among elites over the image of New Spain across Europe and the increasing breakdown of the *sistema de castas*

*National: people, events, and ideas of the time*

- Enlightenment
- Gabinete de Historia Natural in Madrid, a testament of Bourbon efforts to promote intellectual and scientific inquiries, allowed Europeans to view casta paintings in the context of other curiosities collected from around the world.
- The terminology of *sistema de castas* reflects trend among enlightened intelligentsia to classify and order the natural world into taxonomies and hierarchies. Carl Linnaeus

published *The System of Nature* in 1735.

*World: people, events, and ideas of the time*

- Spanish imperial loss
- War of the Spanish Succession (1700-1713)- lost national and international territories
- African Diaspora
- Most of colonies of the Americas and Caribbean depended on slave labor. Millions of Africans came against their will to America to work as slaves in a variety of trades. The conditions of slavery differed according to region and period. In the eighteenth century, New Spain had a large number of free Afro-Mexicans.

*Conclusions about local/regional, national and world context at the time:* Spain had gained a reputation as intellectually and economically backwards. Many European travelers interpreted the increasing number of castas and free Afro-Mexicans as evidence of Spanish degeneracy. Spanish elites wanted to improve their reputation internationally and sought to take part in the Enlightenment's focus on natural science.

### 4. Relationship to the Discipline in the Social Sciences/Social Studies

*Discipline:* History (many possibilities including archaeology, sociology, anthropology)

*Evidence of Relationship:* Produced during the eighteenth and early nineteenth centuries, casta paintings serve as primary evidence of how Spanish elites ideally envisioned the society of New Spain.

*Field/ National Curriculum Standards for Social Studies (NCSS)*

*Theme:* Power, Authority, and Governance (Other NCSS themes include 1) culture, 2) time, continuity, and change, 3) people, places, and environment, 4) individual development and identity, 5) Individuals, groups, and institutions 6) production, distribution, and consumption, 7) science, technology, and society, 8) global connections, and 9) civil ideals and practices; additionally teachers can use themes of their curricula)

*Evidence:* Casta paintings depict a reality that never existed. They show that Spain held firm control over its colonies and strict social hierarchy differentiated each casta to an appropriate economic niche.

### Appendix II: Primary Source Analysis Guide to Historical Thinking: Images (adapted from Figure 2 from Frederick Drake and Sarah Drake Brown, "A Systematic Approach to Improve Students' Historical Thinking.")

#### 1. Identify the Document

Artist (if known):

Title:

Date:

Attributes of Document (size, numbers of panels):

## Special Section: Teaching and Learning the Personal and the Present in World History

### 2. Analyze the Source

Main idea of the source:

- What people or objects do you see in the image?
- What are people, if any, doing in this image?
- Who do you think these people could be?
- What does this image tell you about ways of living?
- When do you think this image was created?
- Why do you think this image was created?
- Preceding conditions that motivated the producer of the image?
- Intended audience and purpose?
- Relationship to other sources?
- Biases of image's producer?
- Questions to ask the image's producer?

### 3. Historical Context

*Important people, events, and ideas at the time of the image's creation*

- Local/Regional: people, events, and ideas of the time?
- National: people, events, and ideas of the time?
- World: people, events, and ideas of the time?
- Conclusions about local/regional, national and world context at the time?

### 4. Relationship to the Discipline in the Social Sciences/Social Studies

Discipline?

Evidence of Relationship?

Field/ NCSS Theme?

Evidence?

Notes

- 1        Patrick Manning, *The African Diaspora: A History Through Culture* (Oxford University Press, 2007), 139; Romero de Tejada y Pilar Picatoste, *Frutas y castas ilustradas* (Madrid: Ministerio de Educación, Cultura y Deporte, Secretaría de Estado de Cultura, 2003), 13; Katzew, *Casta Painting*, 15; Ilona Katzew, "Casta Painting: Identity and Social Stratification in Colonial Mexico," in *New World Orders: Casta Painting and Colonial Latin America*, ed. Katzew (New York: Americas Society, 1996): 6. Nearly all casta paintings originated in New Spain. There is one known Peruvian set of casta paintings that the Viceroy of Lima sent to the Charles IV in 1770. There have been a few sets from Bolivia and Ecuador. Because the vast majority of casta paintings come from New Spain, historians consider the paintings in the context of the society of New Spain.

### Appendix III: Source Analysis: "Many pass as Spaniards who in their own hearts know that they are *mulattos*."

Excerpted from Pedro Alonso O'Crouley, *Idea compendiosa del reyno Nuevas España* (A Description of the Kingdom of New Spain) 1774, translated and edited by Sean Galvin (San Francisco: John Howell Books, 1972), 19-21.

Introduction: "Pedro Alonso O'Crouley (1740 - 1817). O'Crouley, a Spanish merchant from Cadiz included a set of illustrations in his *A Description of the Kingdom of New Spain* (1774) that resemble the casta genre. He eventually settled in Cadiz where he acquired a large collection of antiquities, coins, paintings, and geological specimens collected in Mexico. A renowned antiquary, O'Crouley became a member of the "Real Academia de Historia, the Real Sociedad Vascongada, the Real Sociedad Economica Matritense, and a corresponding member of the Society of Antiquaries of Edinburgh." His interest in the natural history, cultures, and economic resources of New Spain demonstrate the mentality of the Enlightenment.<sup>1</sup>

#### Racial Mixtures

Parentage	produce a	Offspring
Spaniard and Negro		<i>mulato</i>
<i>mulato</i> and Indian		<i>chino grifo*</i>
Negro and Indian		<i>lobo</i> , or <i>sambayo</i>
Spaniard and Indian		<i>mestizo</i>
Spaniard and <i>mestizo</i>		<i>castizo</i> , or <i>albino</i>
Spaniard and <i>castizo</i>		<i>Spaniard</i>
Spaniard and <i>mulato</i>		<i>morisco</i>
Spaniard and <i>morisco</i> , or rather an <i>albino</i>		<i>saltas atrás**</i>
Spaniard and <i>salta atrás</i>		<i>tente en el aire***</i>
Indian and <i>lobo</i>		<i>chino cambujo</i>
Indian and <i>mestizo</i>		<i>coyote</i>
Indian and <i>coyote</i>		Indian
Indian and <i>chino</i>		<i>albarazado</i>
Indian and <i>mulato</i>		<i>lobo</i>
Spaniard and <i>morisco</i>		<i>albino</i>

## Special Section: Teaching and Learning the Personal and the Present in World History

\* *Chino*, a word with various meanings, is used by O'Crouley in connection with racial mixtures only. A *chino grifo* is a frizzly-headed *chino*; a *chino cambujo*, a very swarthy one.

\*\*Literally, a 'jump backward'; i.e., away from Spanish stock

\*\*\*Literally, 'very much in the air'; i.e., of very dubious standing

Finally, there are the heathen Indians.

As has already been mentioned, conditions of race and lines of descent from which these mixed-bloods originate are Spanish, Indian, and Negro. It is known that neither Indian nor Negro contends in dignity and esteem with the Spaniard; nor do any of the others envy the lot of the Negro, who is the "most dispirited and despised." Likewise, basic stocks and their compounds uniformly rate lowest among mixed-bloods the *mulato*, notwithstanding the characteristic high spirit with which he customarily performs his duties with a gallant air and (even though humbled in service to a Spaniard) at the same time aims to establish his position on a higher level than the rest, in which ambition he has in large part succeeded, especially as regards the Indians, whom he treats as inferiors, using them as servants.

If the mixed-blood is the offspring of a Spaniard and an Indian, the stigma disappears at the third step of descent because it is held as systematic that a Spaniard and an Indian produce a *mestizo*; a *mestizo* and a Spaniard, a *castizo*; and a *castizo* and a Spaniard, a Spaniard. The admixture of Indian blood should not indeed be regarded as a blemish, since the provisions of law give the Indian all that he could wish for, and Philip II granted to *mestizos* the privilege of becoming priests. On this consideration is based the common estimation of descent from a union of Indian and European or creole Spaniard. From the union of a Spaniard and a Negro the mixed blood retains the stigma for generations without losing the original quality of the *mulato*.

Because it is agreed that from a Spaniard and a Negro a *mulato* is born; from a *mulato* and Spaniard, a *morisco*; from a *morisco* and a Spaniard, a *torna atrás*; and from a *torna atrás* and a Spaniard, a *tente en el aire*, which is the same as a *mulato*, it is said, and with reason, that a *mulato* can never leave his condition of mixed blood, but rather its is the Spanish element that is lost

and absorbed into the condition of a Negro, or a little less, which is that of a *mulato*. The same thing happens from a union of Negro and Indian, the descent being as follows: Negro and Indian produce a *lobo*; *lobo* and Indian, a *chino*; and *chino* and Indian, an *albarazado*; all of which incline toward the *mulato*.

When Spanish stock is mixed with Indian several times over, there is also a return to Indian. Thus, from a Spaniard and an Indian comes a *mestizo*; from a *mestizo* and an Indian, a *coyote*, and from a *coyote* and an Indian, an Indian.

In any event a pure-bred Indian is as untainted in blood as a Spaniard, with whom there is no incompatibility as there is with the Negro; although their mixture continues, it is uncontaminated through all the degrees of descent and back to the original starting point. Consequently, it would be useless to attempt to discuss the wide series of mixtures that are ultimately absorbed back into the Indian and the Spaniard.

It only remains to say a last word on the mixture with the Negro, in whatever degree it may be. To those contaminated with the Negro strain we may give, over-all, the name of *mulatos*, without specifying the degree or the distance direct or indirect from the Negro root or stock, since, as we have clearly seen, it colours with such efficacy, be it the first union with an Indian or Spaniard or a mixture of these, that it always results in some kind of *mulato* mixture, which even the most effective chemistry cannot purify. Many pass as Spaniards who in their own hearts know they are *mulatos*, and those known to be such are sometimes, more leniently, called *pardos* just as Negroes are sometimes called *morenos*.

### Notes:

- 1 Dean Smith, 181; Pedro Alonso O'Crouley, *Idea compendiosa del reyno Nuevas España* (A Description of the Kingdom of New Spain) 1774, translated and edited by Sean Galvin (San Francisco: John Howell Books, 1972): vii-xi

### Appendix IV: Discussion Questions

1. Why do you think artists stopped producing casta paintings in the early 19<sup>th</sup> century?

Consider...

- 1821: Colonial Independence
- 1822: Mexican government banned casta designations
- 1824: Mexican constitution declared that all citizens were equal<sup>1</sup>

2. How do you think casta paintings and the discourse surrounding *castas* and *calidad* affected social practices, self-identities, and conceptions of community among denizens of New Spain?

3. According to O'Crouley, why did the union of a *castizo* and

Spaniard produce offspring with pure Spanish lineage and no Indian ancestry?

4. Study the casta paintings that contain individuals with African ancestry. How do these depictions compare to O'Crouley's observations?

5. Diana DiPaolo Loren, an archeologist, has found material evidence at the former *Los Adaes*, an outpost of 18<sup>th</sup> century New Spain, in present day Texas, that shows that Spaniards, Africans, *castas*, and Indians regularly broke sumptuary laws and transgressed beyond the economic and social niche assigned to an individual of their lineage. Do casta paintings support Loren's findings? Why or why not?

## Special Section: Teaching and Learning the Personal and the Present in World History

6. During the eighteenth century, boundaries between *castas* became more permeable than ever before. Spaniards married castas in increasing numbers. Many individuals of lower *castas* took advantage of economic, legal, and social opportunities to choose a more beneficial *casta* designation. How do *casta* paintings portray or contradict these trends? Why do you think *casta* paintings were so popular among the elites?

10. Zambaigo + indio = cambujo
11. Cambujo + mulata = albarasado
12. Albarasado + mulata = barcino
13. Barcino + mulata = coyote
14. Coyote woman + indio = chamiso
15. Chamisa + mestizo = coyote mestizo
16. Coyote mestizo + mulata = ahí te estás

### Appendix V: Sistema de Castas<sup>2</sup>

Introduction: Appellations of various castas varied according to region and context.<sup>3</sup> Censuses and colonial records used the terms inconsistently. The more mixed an individual the greater number of names used to identify his or her casta within legal documents. Court records document that witnesses frequently disagreed on which *casta* the accused belonged to.<sup>4</sup>

1. Español + india = mestizo
2. mestizo + española = castizo
3. castizo + española= español
4. española + negro = mulatto
5. española + mulatto = morisco
6. Morisco + español = albino
7. Español + albina = torna-atrás
8. Indio + torna-atrás woman = lobo
9. Lobo + indio = zambaigo

### Notes:

- 1 Carrera, 54.
- 2 Carrera, 36-37.
- 3 Katzew, *Casta Paintings*, 43
- 4 Andrews, 48-49; Carrera, 37, 147; Guzauskyte, 186-188; Edward R. Slack, "The Chinos in New Spain: A Corrective Lens for a Distorted Image," *Journal of World History* 20, no. 1 (March 2009): 58. Slack offers the most compelling example. Many casta paintings suggest that Asians or "chinos" did "not arrive to the shores of New Spain via the Philippines, but were the offspring of the viceroyalty's inhabitants, specifically between mulattos and indios." For examples see Ilona, Katzew and John A. Farmer, Roberto Tejada, and Miguel Falomir, *New World Orders: Casta Painting and Colonial Latin America* (New York: Americas Society, 1996) 14, 39, 40, and plates 23, 60.

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### Pioneers in World History Awards 2012 Michele Foreman and Ross E. Dunn

The World History Association is pleased to announce that Ross E. Dunn and Michele Foreman are the recipients of the 2012 Pioneer in World History Award. World historians are in great debt to Ross E. Dunn not only for his ground-breaking work on Ibn Battuta, but also for his service at the National Center for History in the Schools. Michele Foreman drew national attention to world history as the 2001 National Teacher of the Year and thereafter as President of the World History Association, 2006-2008. Past recipients include Alfred Crosby, William H. McNeill, Heidi Rupp, Kevin Reilly, Jerry Bentley and President Liu of Capital Normal University. It is fitting to acknowledge the contributions of these men and women to our lives as teachers and scholars. This award will be presented at the World History Association's annual conference in Albuquerque (June 27-30, 2012).

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Albuquerque High School, Albuquerque, New Mexico  
June 27-30, 2012**

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## **Differences Between High School U.S. and World History Teachers in Kansas**

Thomas W. Barker & Joseph O'Brien  
*University of Kansas, Department of Curriculum and Teaching*

### Introduction

The educational landscape has drastically changed with the enactment of the No Child Left Behind (NCLB) legislation a decade ago. Research reveals that social studies instruction has substantially decreased in relation to math and English language arts.<sup>1</sup> In addition, many states have adopted standards and assessments in social studies that typically focus on a student's content knowledge and which assume that instructional practices, content emphasis, notions of citizenship, rational for teaching social studies and professional development is similar amongst social studies teachers. Living in Kansas, which has adopted content focused standards and assessment, we were interested in how U.S. and world high school teachers were similar and different in this regard, particularly since little research has examined how, if at all, these two types of teachers might differ in their classroom habits. For this reason we have analyzed data collected as part of the National Study of the State of Social Studies to determine how Kansas's U.S. and world high school history teachers differ in their instructional practices, content emphasized, rational for teaching social studies, notions of citizenship and education environment. We hope not only to inform history educators, but also to help highlight the importance of history education in an era of NCLB.

### Overview of Study

In the Fall of 2010, researchers with the National Study of the State of Social Studies Teachers surveyed K-12 social studies teachers nationwide to gain a sense of their thinking about the state of social studies. They developed survey items to better understand the context in which respondents work, characteristics of class organization and curriculum, instructional practices and social studies concepts, impact of state mandated testing, and professional development needs. Several of the researchers piloted the survey in Spring 2009 in North Carolina and Indiana and then revised and finalized the survey instrument. The survey consisted of Likert-type items, ranking items, select type items, and two open-ended discussion questions. In the Fall of 2009, researchers in each state formed teams that assumed responsibility for establishing a sample population, conducting the survey statewide, and analyzing the data collected. We have worked as the research team for Kansas. Jeff Pasie at Towson University, who first envisioned this project and who coordinated efforts in the various states, is overseeing the analysis of the national data.

During the Spring and Summer of 2010 we established a database of emails of Kansas elementary and secondary social studies teachers to complete the online survey. We developed a random-stratified sample based on the school district's size, the students' ethnic makeup and SES level within each district, and whether the teachers' email directory was public. When looking at selected district we chose those teachers that were listed by the Kansas Department of Education as either being credentialed to teach elementary grades or social studies in grades 6-12. In the

Fall and Winter of 2010, we invited via email 3,337 elementary teachers and 676 secondary social studies teachers to take the online survey. 423 teachers completed the survey for a total response rate of 10.5%. However, the response rate for secondary teachers was much higher at 21.7% or 147 responses.

### Comparison of U.S. & World History Teachers

In answering the questions of how U.S. and world history teachers were different and similar, we decided to focus on three specific areas: 1) instructional activities and content; 2) why social studies was important; and 3) professional development. Of the 147 secondary respondents 77 came from middle schools and 70 came from high schools. The survey only asked respondents at the high school level what specific subjects they taught. Of the 70 high school respondents 57 of those either taught U.S. history (31), world history (14) or both (12). As with any statistical analysis we hoped to secure a large enough sample to make inferences about the population. Though we both feel that the total sample of secondary teachers of 147 is high enough to make these inferences about secondary social studies teachers in Kansas, we are more cautious about speaking in such terms with the lower responses from the subpopulations of U.S. and world history teachers. Because of this we provide our findings in terms of reference for future research that might be able to rely upon a larger sample size of U.S. and world history teachers. When we conducted a statistical analysis we accounted for demographic characteristics, such as gender, student SES level, highest degree obtained, whether the teacher taught in an urban, suburban or rural district, and U.S. history teachers was held as the constant.<sup>2</sup> Thereby, our analysis is comparing those that taught world and both history classes to that of U.S. history teachers.

When looking at what types of instructional activities teachers reported using, there are several similarities when looking at U.S. and world history teachers. Respondents were provided with five choices of how frequently they used each of eleven different instructional activities: 1) Almost daily; 2) Frequently (1-2 times per week); 3) Occasionally (2 -3 times/month); 4) Rarely (2-3 times/year); & 5) Never. The eleven activities are listed in their order of greatest to least frequency in Table 1. Though the top five instructional activities vary in their ranking between the three groups, all three groups reported using lecturing, examining primary source material, and writing assignments. The only item that was found to be statistically significant was working with maps & globes. Both world history teachers and those that taught both subjects were more likely to use this instructional approach than U.S. history teachers. Our analysis also looked to see if there was an interaction effect that might increase the use of maps or globes in classroom instruction, but we found nothing. While it makes sense those that report teaching world history use globes and maps more frequently than those that only teach U.S. history, we still are still curious if the use of them is different or varies from how they may be used by U.S. history teachers.

When looking at the topics that teachers emphasized, respondents had the choice to rank eleven different content themes based on how frequently they discussed them: 1) Almost daily; 2) Frequently (1-2 times per week); 3) Occasionally (2 -3 times/month); 4) Rarely (2-3 times/year); & 5) Never. The

eleven content themes are listed in their order of greatest to least frequency in Table 2. All the groups reported political and social history, current events, and core demographic values within the top five items they emphasized during instruction. When we conducted a statistical analysis we found that there was a significant statistical difference with world and U.S. history teachers when

emphasizing issues of race and class and civic responsibility. Here world history respondents reported they were less likely to discuss these two topics than those that taught U.S. history classes. Though issues of race and class is an appropriate topic for world history courses, our previous research on state U.S. history standards concluded that African-Americans' struggle to achieve equality was one of the key narratives in U.S. history standards, which might help explain this finding. Nonetheless, we cannot provide a concrete answer to this question based on the survey

results we analyzed. But, this is an interesting topic that we hope to further explored.

Though initially slightly puzzled why world history teachers

reported not emphasizing civic responsibility as much as U.S. history teachers, our analysis of the history teachers' response why social studies is important helped shed some light on the subject. Respondents were asked to rank on a scale of 1-6 (1 being most important and 6 being least important) five reasons for teaching social studies: 1) To prepare good citizens; 2) Because it is required by state standards; 3) To teach students content knowledge; 4) To teach students life skills; 5) To prepare students for the next grade level; & 6) To develop skills in language arts/reading. All three groups of teachers indicated that the most

important reason for teaching social studies was "to prepare good citizens." Additionally, all three groups listed "because it is required by state standards" as the least important reason for teaching social studies. The three groups were similar in the rationale for teaching social studies, which appears to convey this universal premise that the basis of social studies education is citizenship. In two separate questions respondents then were asked how

Rank	U.S.	Both	World	All High School
#1	Lecture	Lecture	Lecture	Lecture
#2	Primary Sources	Writing Assignments	Cooperative Learning Assignments	Cooperative Learning Assignments
#3	Writing Assignments	Primary Sources	Maps & Globes	Writing Assignments
#4	Cooperative Learning Assignments	Maps & Globes	Writing Assignments	Primary Sources
#5	Watch Videos	Watch Videos	Primary Sources	Watch Videos
#6	Maps & Globes	Cooperative Learning Assignments	Textbook-based Worksheets	Maps & Globes
#7	Questions/Define Terms from the Textbook	Computer-based Social Studies Applications	Group Projects	Textbook-based Worksheets
#8	Group Projects	Questions/Define Terms from the Textbook	Watch Videos	Questions/Define Terms from the Textbook
#9	Textbook-based Worksheets	Textbook-based Worksheets	Questions/Define Terms from the Textbook	Group Projects
#10	Computer-based Social Studies Applications	Group Projects	Computer-based Social Studies Applications	Computer-based Social Studies Applications
#11	Role Play/Simulations	Role Play/Simulations	Role Play/Simulations	Role Play/Simulations

much they agreed or disagreed first with mastering basic facts, concepts and content as social studies' primary goal and second with developing critical thinking and decision-making skills, all three sets of teachers were more likely to agree that developing students' critical skills was the primary goal of social studies, which suggest that respondents consider this a critical component of citizenship

However, the respondents' answer to two open-ended questions of

"why social studies is important" and "what do students gain from social studies instruction" at the grade level they taught convey a very interesting portrayal of citizenship. First, all three groups specifically mention that

social studies is important for the development of skills as they become young adults and leave high school. However, world history teachers continually used the word "global" or "world" when discussing being prepared in terms of life skills and politically active as part of citizenship. One world history teacher respondent noted that students understand that they are "part of something bigger" from their social studies instruction. U.S. history teachers on the other hand used the term "community" in discussing citizenship preparation, while those that taught both subjects varied in the use of "global", "world" or "community".

Table Two: Frequency of Social Studies Content Emphasized by Teachers

Rank	U.S.	Both	World	All High School
#1	Political History	Current Events	Political History	Current Events
#2	Current Events	Social History	Social History	Political History
#3	Core Democratic Values	Political History	Current Events	Social History
#4	Social History	Core Democratic Values	Core Democratic Values	Core Democratic Values
#5	Issues of Race and Class	Issues of Race and Class	Economic Concepts	Issues of Race and Class
#6	Civic Responsibility	Civic Responsibility	Diversity of Religious Views	Civic Responsibility
#7	Learning about the U.S. Constitution	Learning about the U.S. Constitution	Fundamentals of local, state, and/or federal law	Learning about the U.S. Constitution
#8	Fundamentals of local, state, and/or federal law	Fundamentals of local, state, and/or federal law	Issues of Race and Class	Fundamentals of local, state, and/or federal law
#9	Economic Concepts	Economic Concepts	Learning about the U.S. Constitution	Economic Concepts
#10	Diversity of Religious Views	Diversity of Religious Views	Civic Responsibility	Diversity of Religious Views
#11	Historiography	Historiography	Historiography	Historiography

It was this variation that first caught our attention and led to further analysis. While we often consider citizenship and civic responsibility as two sides of the same coin, perhaps world history teachers perceive fewer opportunities for students to act civically on a “global” or “world” level, unlike U.S. history teachers whose focus is more at the “community” or national level.

Regarding professional development, those who attended one or more professional development opportunities within the last year indicated that U.S. history related topics were covered 70% of the time, while world history related topics were covered 15% of the time. Cost was the primary reason for not attending professional development. However, none of the U.S. teachers listed the item option of “nothing in my content areas” as preventing them from attending professional development, while four of the fourteen world history respondents listed this as a reason. Also of interest, was a significant statistical difference between world history teacher and U.S. history teachers in that world history teachers typically did not consider “content in the subject they taught” as being a priority when decided upon attending a professional development. When asked if they agree or disagree with whether their school’s administration was generally supportive of social studies, world history teachers were again statistically significantly different than U.S. history teachers in that they were more likely to disagree their administration was supportive of social studies. There was also a slight interaction effect in that those world history teachers that described their setting as rural increased the effect of their disagreement.

#### Conclusion

Based on these initial findings we propose four recommendations regarding future research. First, design a study that would increase the sample size of U.S. and world history teachers to more than 100 for a normal distribution more representative of the population. This would perhaps mean focusing the study on three or four urban areas and three or four suburban districts, including districts without a public email directory of teachers, to gather the number of respondents needed. Second, we recommend conducting follow-up interviews so as to better understand some of the differences noted between the responders. For example, knowing that there is a difference in the use of maps and discussing issues of race and class is but a start. The interviews perhaps would give insight into how

teachers use maps differently and what they actually discuss about race and class. Third, we recommend devising a series of questions that address how U.S. and world history teachers think about citizenship preparation as part of their curriculum and instruction. While our findings suggest that U.S. and world history teachers think and act differently, we are interested in exploring the nature and depth of those differences particularly what is meant by their use “community” and “world”. Fourth, create a survey for administrators in those sampled districts to gain a sense of what their views are about the two history courses and then conducting follow-up interviews as needed.

The National Study on the State of Social Studies Teachers results have been very interesting in seeing and understanding more about issues related to social studies in Kansas and throughout the U.S. However, we both agree that this is perhaps a beginning of more large-scale studies that need to be conducted to better understand issues that social studies teachers have in order to help train the next generation of educators.

#### Notes

1 Some research that have illustrated these conclusions are: Jennifer McMurrer, *Instructional Time in Elementary Schools: A Closer Look at Change for Specific Subjects* (Washington, DC: Center on Education Policy, 2008); Phillip Van Fossen, “Reading and Math Take So Much of the Time: An Overview of Social Studies Education in Elementary Classrooms in Indiana” *Theory and Research in Social Education*, 33 (2005), pp. 376-403; Claus Von Zastrow, *Academic Atrophy* (Washington, DC: Council for Basic Education, 2004); Susie Burroughs, “Social Studies Education in the Age of Testing and Accountability” *Educational Measurement: Issues and Practice* 24 (2005), pp. 13-20.

2 In conducting our statistical analysis we conducted we used a linear regression model and choose to report those that were significant at below .10 instead of .05 because of the uncertainty of effect size and the size of the sample population.



World History Association



World History Association

## World History Association 2013 Book Prize

Created in 1999, the World History Association (WHA) Book Prize recognizes outstanding contributions to the field of world history. Authors, publishers, WHA members, or other interested parties may nominate books published during a calendar year. Please note that only books published in 2012 are eligible for this competition.

### SUBMISSION INSTRUCTIONS

Copies of nominated books for the 2013 WHA Book Prize should be sent to each member of the Book Prize Committee below.

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University of Washington  
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John K. Thornton  
891 Belmont St.  
Watertown, MA 02472

Merry E. Wiesner-Hanks  
Dept. of History  
University of Wisconsin, Milwaukee

### SUBMISSION DEADLINE

Entries must be submitted by **FEBRUARY 1, 2013** to allow time for juror evaluations. Late entries and submissions that do not adhere to these guidelines will be disqualified.

### AWARDS

The winner of the Book Prize will receive an award of \$500. Formal bestowal of the check is made at the WHA annual conference, normally held in June. If the author cannot attend, the WHA Executive Director or Treasurer will mail him or her the check following the annual conference. A one year membership in the WHA and a certificate will also be included with the prize.

In the event that the panel of judges considers that the quality of the entries does not warrant the awarding of any prize, the judges shall have the right to make no awards available.

The World History Association is a community of scholars, teachers, and students who are passionately committed to the study of the history of the human community across regional, cultural, and political boundaries.

**The 2012 WHA Symposium at Pannasastra University, Siem Reap, Cambodia**  
Paul Jentz  
*Conference Committee Chair*

The World History Association's symposium, "Southeast Asia and World History," was hosted by Pannasastra University in

my wife, Gayle and I took from the airport to the hotel — nearly midnight, the dark Cambodian countryside rich with the scent of flowering trees, the cool wind washing over us....Instinctively, we knew that the next ten days were to be the experience of a lifetime. Indeed, the camaraderie of fellow world historians, the conference itself, and the many explorations of the temples and of Siem Reap all combined for a truly unique and forever memorable adventure.

As with all

WHA symposia, and especially as with all WHA conferences the Pannasastra symposium took several years of planning, and it required the confluence of a number of important ideas and strategies. WHA connections with Pannasastra were established in 2009 when current WHA president Marc Gilbert, working with Teachers Across Borders, Inc., designed a conference on Cambodia and World



Siem Reap, Cambodia from January 2 through 4, 2012. It was, in short, a fabulous success. In attendance were a total of 85 scholars from both the region and countries throughout the world, and the symposium provided all with the opportunity to discuss world history methodology and pedagogy while identifying world history processes in Southeast Asia. Some of the topics addressed included the nature of world history, indigenization, localization, syncretism, ancient Southeast Asian cultures and empires, the colonial experience, religion, art, regional questions in global perspective such as borderlands and the environment, comparative genocide, and models for World History in terms of scholarship and instruction.

Because the city of Siem Reap is adjacent to the Archeological Conservation Area, the WHA arranged tours to several major temples including Angkor Wat, Ta Prohm, Bayon, the East Baray, the West Baray, and Roluos. Conferees also took advantage of the ubiquitous tuk tuk drivers who could whisk us through traffic with almost mystical expertise. Angkor Wat, for example, was only a fifteen-minute tuk tuk ride from the university.

On a personal note, one of my favorite experiences was my very first in Siem Reap: the tuk tuk ride that

History that was hosted by the University. The University hosted the conference again in 2010. Also, in 2010, the establishment



of annual WHA symposia was pioneered by Alfred J. Andrea, president of the WHA from 2010 to 2012. Held annually outside

of the United States, symposia provide an excellent vehicle for the WHA to expand globally, and they provide an expeditious complement to the traditional pattern of holding a WHA annual conference outside of the United States only once every three years. Working with Istanbul Şehir University, President Andrea arranged the first WHA symposium there in October, 2010 (“Byzantine and Ottoman Civilizations in World History”), and it was attended by nearly 350 historians.

Incidentally, in addition to being held exclusively outside of the United States, the significant difference between a symposium and a conference is that a symposium is tightly focused around a single theme. All papers and panels must relate to that theme, and ideally each reflects cutting-edge research. The annual conferences focus on two themes but also accept papers, panels, and round tables on any world history topic, space permitting. They also include a wider variety of activities, including poster sessions (to be instituted at the 2012 conference), a meeting of the Executive Council, a Business Meeting, a meeting of the WHA affiliates, gatherings of various special-interest groups, such as graduate students, and an exhibition of books and related academic and pedagogical

matter. Indeed, conferences deal much more broadly and deeply with pedagogical issues than do the symposia.

The symposium at Pannasastra University would not have been possible without the intensive planning that went into it, and for this the WHA needs especially to recognize the tireless efforts of its Secretariat, Winston Welch and Jackie Wah. Their talents and energy are the WHA's greatest treasure. We also need to thank the administration, faculty, and staff at Pannasastra University; they were gracious, truly accommodating, and, perhaps of greatest significance, they are keenly interested in helping to expand the study of world history throughout Southeast Asia.

Locations for upcoming WHA symposia include The Great Tang Western Market Museum in Xi'an, China in October, 2012 with the theme of “The Silk Road in World History,” and Notre Dame University in Freemantle, Australia, April 3 - 5, 2013, the theme of which will be “Empire: Faith and Conflict.” For further information about WHA symposia and conferences, please visit [www.thewha.org](http://www.thewha.org).



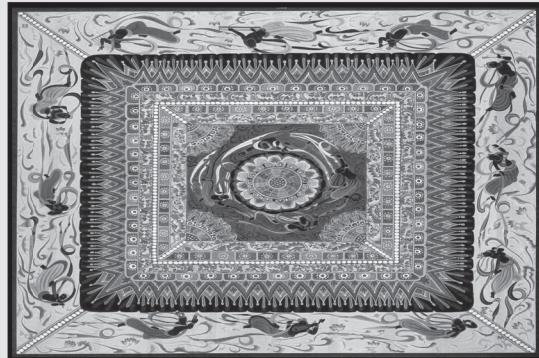
World History Association

#### **WHA Meetings for 2012 Albuquerque Conference:**

**World History Association Executive Council Meeting**  
Wednesday, June 27<sup>th</sup>, 12:30 – 3:45, Museum of Albuquerque

**World History Association Affiliates' Luncheon Meeting**  
Thursday, June 28th, 12:30 – 2:00, Albuquerque High School

**World History Association Business Meeting**  
Friday, June 29th, 9:00 am – 10:15 am, Albuquerque High School



Buddhist Cave Painting at Dunhuang on the Silk Road

**CALL FOR PAPERS  
SYMPOSIUM ON THE SILK ROAD  
XI'AN, CHINA  
8-12 OCTOBER 2012**

**SPONSORED BY THE GREAT TANG WESTERN MARKET MUSEUM  
AND THE WORLD HISTORY ASSOCIATION**

The Great Tang Western Market Museum and the World History Association are co-sponsoring a symposium on the history and art of the Silk Road, ca. 100 BCE-ca. 1500 CE, with special emphasis on the era of the Tang Dynasty, 618-907.

All sessions will be held at the museum, which is located in the midst of the archaeological remnants of the Western Market of Chang'an (ancient Xi'an), the site where merchants and other travelers from lands west of China resided and plied their trades during the Tang Era. Surrounding the museum is a newly reconstructed Western Market consisting of shops, restaurants, apartments, and a five-star hotel. Elsewhere in and around Xi'an are a number of extraordinary sites for the world historian, including the monumental city wall, the Great Wild Goose Pagoda of the Silk Road pilgrim-monk Xuanzang, the Muslim market and Great Mosque, the Shaanxi History Museum, and the ancient Bell and Drum Towers. A short distance outside of the city is the famous terracotta army of Qin Shi Huangdi, the first emperor of China (221-210 BCE).

**Submission Deadline: 15 June 2012**

Current plans for the symposium, which are subject to modification, are as follows:

<b>Monday, October 8</b>	Optional all-day tour of Xi'an/environs
<b>Tuesday, October 9</b>	Optional all-day tour of Xi'an/environs
<b>Wednesday, October 10</b>	Optional half-day tour of Xi'an; Afternoon Conference Registration and Opening Ceremony, Keynote Address and Opening Banquet
<b>Thursday, October 11</b>	Concurrent panel sessions and Keynote Address
<b>Friday, October 12</b>	Concurrent panel sessions; Keynote Address Closing Banquet
<b>Saturday, October 13</b>	Optional Xi'an/environs tour
<b>Sunday, October 14</b>	Registrants depart

Registration space for the symposium is strictly limited to 200 participants (150 from outside of China), with, of course, priority given to persons whose panels and papers have been accepted by the Program Committee.

**The deadline for panel and paper proposals is 15 June 2012**, with a promise that decisions will be announced in the first week of July. Priority will be given to proposals for entire panels (3 papers, chair, and commentator as needed) that treat the trans-cultural, trans-regional aspects of the Silk Road. Individual papers of high quality will be accepted as space allows. A form for proposals will be available at [www.thewha.org](http://www.thewha.org) before the end of March. Likewise, further information regarding fees, accommodations, and other details will be available at that site soon.



World History Association

### A New Lecture Series in World History

Paul Jentz

*North Hennepin Community College*

North Hennepin Community College in Minneapolis, Minnesota has launched its new annual lecture series in world history. Over a period of three days, November 8 -10, 2011, Alfred J. Andrea, President of the World History Association and Professor Emeritus of Medieval History, The University of Vermont, inaugurated the program by presenting three lectures on the Silk Road, spanning the years ca. 100 BCE to ca. 1500. He examined Silk Road connections between East Asia, Central Asia, and the Mediterranean worlds, not only in terms of trade, but, most importantly, in terms of religious, artistic, and intellectual exchanges. This was an altogether fabulous experience for our students. The 150-seat lecture hall in which Dr. Andrea spoke had standing room only for all three events.

Though many of the students in attendance were already enrolled in world history courses, many were students from across the disciplines; so Professor Andrea's lectures provided an excellent opportunity to give these students with an understanding of world history by attending these truly engaging lectures on The Silk Road.

For several weeks after the series, students often stopped to tell me how much they enjoyed the lectures, and those who were able to attend only one or two of the lectures in the series

told me that they wished they could have attended all three. Again, a great number of these positive comments came from students other than those enrolled in world history or in any other history course: compelling evidence that the nature of world history is such that it proves fascinating for people across the academic spectrum. Many members of the faculty from departments across campus also attended, and we continue to have great discussions regarding world history, thanks to these lectures.

Yet another indicator of the power of world history and of the engaging quality of Al Andrea's presentations is the positive effect that the lectures had on the students enrolled in developmental courses. These are students who require remediation to one degree or another in order to prepare them for college-credit classes. Their instructors shared with me many stories about their students' enthusiasm for the material; these lectures, in a very real way, opened up worlds for them. One developmental student remarked, "I learned so much from Dr. Andrea's lectures. It was great to experience what a real college course is like, and I am excited to see more lectures like this."

Dr. Andrea will be returning to North Hennepin Community College for another lecture series in October, 2012: "The Crusades in World History." That series of lectures will be organized through the WHA's Speakers' Bureau. For more information about the Speakers' Bureau, please visit [www.thewha.org](http://thewha.org).

### New England Regional World History Association (NERWHA)

Dane Morrison, President; Michele Louro, Vice-President; Mary Jane Maxwell, Secretary-Treasurer.

Members: 55

Accomplishments since last report: We continue to receive proposals for our April 28<sup>th</sup> Symposium, "Braided Narratives: Integrating Teaching and Research, Part Two." Heather Streets-Salter, new member and director of the Northeastern World History Center, has mobilized her world history graduate students to join NERWHA and present at the symposium. Along with new members, NERWHA also has a new logo:



Goals for next six months: Form a NERWHA panel at the New England History Association (April 2012) and the World History Association (June 2012).

Submitted by Mary Jane Maxwell, Secretary-Treasurer NERWHA



## 2012 World History Association Membership Form

Note: Membership year runs from January 1 to December 31, 2012. If you join or renew mid-year back issues will be sent to you. Memberships received after October 1, 2012 will be applied toward 2013 membership unless otherwise requested.

WE APPRECIATE YOUR ONLINE REGISTRATION, IT SAVES YOU AND THE ORGANIZATION TIME AND MONEY.  
Join or renew your membership online: [www.thewha.org](http://www.thewha.org).

MEMBERSHIP INFORMATION	PLEASE PRINT CLEARLY	ALL FIELDS ARE REQUIRED
Name _____	Phone: _____ ADDRESS WE SHOULD SEND YOUR PUBLICATIONS TO:	
Mailing address _____		
City, State, Postal Code, Country _____		
Institutional Affiliation _____	E-mail address* _____	
Employment Category (circle): College/University, Community College, High School, Junior/Middle, Elementary, Library		
Other (please specify) _____		

\*YOU WILL RECEIVE CONFIRMATION VIA EMAIL ONCE YOUR MEMBERSHIP HAS BEEN PROCESSED.

### PLEASE SELECT YOUR WHA MEMBERSHIP CATEGORY

NEW MEMBER     RENEWING MEMBER

Regular Membership (includes Independent Scholars)

US \$75 1-Year     US \$145 2-Years     US \$210 3-Years

- |                                    |   |                                  |  |
|------------------------------------|---|----------------------------------|--|
| <input type="checkbox"/> US \$125  | <b>Contributing Member:</b> Your additional gift helps further support the WHA's mission.** | <input type="checkbox"/> US \$60 | <b>New Professional:</b> Individuals in the first 3 years of paid professional work. |
| <input type="checkbox"/> US \$200  | <b>Sustaining Member:</b> The WHA thrives on your generous additional support.**            | <input type="checkbox"/> US \$60 | <b>Adjunct / Part-Time Faculty</b>   |
| <input type="checkbox"/> US \$2000 | <b>Life Member:</b> Payable in either four installments of \$500 or one lump sum.**         | <input type="checkbox"/> US \$40 | <b>Full-Time Student (with current I.D.)</b>   |
|                                    |   | <input type="checkbox"/> US \$40 | <b>Retired / Non-Employed</b>  |

\*\*Life Members, Sustaining Members, & Contributing Members receive recognition in each issue of the *World History Bulletin*.

<b>The Annual Fund</b> We appreciate your added contribution to The Annual Fund. Your additional tax-deductible donation to the WHA will help sustain the organization.  Please enter your contribution amount here.	<b>PAYMENT AMOUNT</b> → Tax-Deductible Gift to the Annual Fund US \$ _____  Membership Fee US \$ _____  <b>TOTAL ENCLOSED OR TO BE CHARGED</b> US \$ _____
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### PAYMENT METHOD

Check / M.O. Enclosed     Visa     MC     Amex     Discover

Card # \_\_\_\_\_ Exp. Date: \_\_\_\_\_ CVV # (3-4 digits on back/front of card) \_\_\_\_\_

Cardholder's Name & Billing Address (if different than Mailing Address) \_\_\_\_\_

Phone: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Make checks payable to: World History Association. Payment must be in USD and payable through a U.S. bank.  
Please note: returned checks will be assessed a \$25 fee.

Telephone: 808-956-7688 | Fax: 808-956-9600 | Email: [thewha@hawaii.edu](mailto:thewha@hawaii.edu) | Website: [www.thewha.org](http://www.thewha.org)

WORLD HISTORY ASSOCIATION, UNIVERSITY OF HAWAII AT MANOA, 2530 DOLE STREET, SAK A-203, HONOLULU, HI 96822-2383 USA



## CALL FOR PAPERS

### The 2012 Phi Alpha Theta / World History Association Paper Prizes in World History

Phi Alpha Theta and the World History Association, with a generous subvention from Oxford University Press, a publisher of history textbooks, co-sponsor two student paper prizes in world history, each of \$500, for the best undergraduate world history paper and the best graduate-level world history paper composed in the 2011-12 academic year.

A world history paper is one that examines any historical issue with global implications. Such studies can include, but are not limited to, the exchange and interchange of cultures, the comparison of two or more civilizations or cultures, or the study in a macro-historical manner of a phenomenon that had a global impact. For example, world history topics might include a study of the trans-cultural impact of Eurasia's Silk Road; a comparative study of the Ottoman and British empires; or the worldwide impact of the Influenza Pandemic of 1919.

#### ELIGIBILITY

To be eligible, students must be members of either the World History Association ([www.thewha.org](http://www.thewha.org)) or Phi Alpha Theta ([www.phialphatheta.org](http://www.phialphatheta.org)) and must have composed the paper while enrolled at an accredited college or university during 2011-2012. Past winners may not compete in the same category again.

#### CRITERIA FOR JUDGING

The Committee will judge papers according to the following criteria: world historical scope; originality of research; depth of analysis; and prose style.

#### SUBMISSION GUIDELINES

- Submissions must be no longer than 30 typewritten, double-spaced pages of text, exclusive of the title page, endnotes, and bibliography.
- Number all pages except for the title page.
- Endnotes must conform to standard historical formats. Do not use parenthetical notes.
- An attached page should accompany the paper, identifying the author, title of paper, home address, telephone number, e-mail address, college affiliation, graduating year and status (undergraduate or graduate student), and the association (WHA or PAT) to which the person belongs. Phi Alpha Theta members must indicate the institution at which they were inducted and the year.
- A one-page (250-word) abstract must accompany each submission. Abstracts of winning papers may be published in WHA related media and announcements.
- Additionally, a letter or e-mail from a relevant history faculty member (the supervising professor, the Chair of the department, or the Phi Alpha Theta chapter advisor) must attest to the fact that the paper was composed during the 2011-2012 academic year.
- Late entries and papers that do not adhere to these guidelines will be disqualified.
- **Deadline: Entries must be time-stamped or postmarked by 11:59 P.M. (CST), JUNE 30, 2012.**

## CALL FOR PAPERS: 2012 PAT / WHA PAPER PRIZES IN WORLD HISTORY

### SUBMISSION INSTRUCTIONS

**To submit your materials by e-mail, send the following as separate attachments on the same e-mail (all attachments must be formatted in MS Word):**

1. Paper submission
2. Page with identifying information
3. Abstract

NOTE: The faculty member's letter must be e-mailed separately.

Send the e-mail to the Committee Chair, Merry Wiesner-Hanks, [merrywh@uwm.edu](mailto:merrywh@uwm.edu), with the subject line: "2012 PAT / WHA Paper Prize."

**To submit your materials by hardcopy:**

Send four (4) copies of the paper, the page with identifying information, the abstract, and the faculty member's letter. On the front of the envelope, lower left-hand corner, write: "2012 PAT / WHA Paper Prize."

Send these materials to:

Merry Wiesner-Hanks  
Department of History  
University of Wisconsin-Milwaukee  
Milwaukee, WI 53201

Winning papers are eligible for consideration for publication in the various publications of the World History Association and Phi Alpha Theta, but no promise of publication accompanies any award.

### AWARDS

Winners in each category (graduate and undergraduate) will receive a \$500 prize, a certificate, and a one-year student membership to the World History Association.

In the event that the panel of judges considers that the quality of the entries does not warrant the awarding of any prizes, the judges shall have the right to make no awards available.

Winners will be notified after August 1, 2012.

### QUESTIONS

Questions about the competition should be e-mailed to Merry Wiesner-Hanks at [merrywh@uwm.edu](mailto:merrywh@uwm.edu).

The World History Association is a community of scholars, teachers, and students who are passionately committed to the study of the history of the human community across regional, cultural, and political boundaries.

## World History Association Business Meeting Minutes

**Belmont Room, Chicago Marriott Downtown Hotel.**  
**Saturday, 7 January 2012. 5:00-6:00 pm.**

President Marc Gilbert said that on behalf of the entire Executive Council, the WHA would like to offer deep gratitude to Immediate Past-President Al Andrea for his meritorious service and to thank him for internationalizing the WHA, for initiating the international symposia, and for bringing humor and energy to the organization.

He introduced Craig Benjamin as current Vice-President, Kerry Ward as Secretary, Carolyn Neel as Treasurer.

Gilbert reported back from the Semi-Annual Executive Council Meeting, which took place on 6 January 2012.

**Graduate Committee:** Gilbert reported the EC's enthusiasm for developing a permanent Graduate Students Committee to respond to the needs and graduate students and introduced Sarah Hamilton as the first representative and chair.

**Finances:** Gilbert pointed out that the operating budget ran at a loss in 2011, but that our assets are still strong. The WHA was slightly in the red in 2011, and we need to find creative ways to increase revenue.

First, he encouraged promoting WHA Citibank Card, as every member joining means \$50 to the WHA as well as a percentage of purchases. Second, he asked members to use the WHA link to Amazon because a percentage of purchases go to the WHA.

**Affiliates:** Gilbert reported that the new affiliates, including the Midwest, are going very strong but some of older ones are a weakening. He asked the Affiliates' presidents to join a list-serv to talk to each other in order to generate some synergy between them. He raised the possibility of sharing resources for workshops.

Benjamin asked how to further relationship of membership between the affiliates and the WHA. New affiliates in Hawai'i and the Midwest are very healthy. The Mid-Atlantic, New England, Northwest, California, and Southeast are also in good shape. Texas and the Mountain West have issues sustaining membership due to geography.

**Symposia:** Gilbert reported that beginning last year the symposia were developed as international focused workshops. Istanbul had over 350 participants, Siem Reap had 80. In 2013 there will be a symposium in Fremantle, Western Australia on the theme of "Empire Conflict and Faith". There is also a symposium being organized at Xian's Great Tang Western Market Museum for the second week in October, 2012. In general, the symposia can lead to publications and outreach.

The success of these symposia has generated interest elsewhere, as shown by universities in Vietnam, the UAE, and Barcelona in becoming future hosts.

The WHA has to think about how these symposia affect the pattern of having every third conference overseas. The EC is considering questions about whether to have international conferences less frequently overseas, particularly as the WHA overseas conferences are very costly for members.

The symposia are bringing in revenue to WHA. The WHA needs to discuss all the international dimensions of its activities.

**Conferences Committee:** Paul Jentz, new Chair of the Conferences Committee, said that there was nothing further to report. With each symposium we stage we increase the WHA's footprint in the world and legitimize the WHA as a global organization. It is a win-win situation and a wonderful "invention" that Al Andrea introduced last year in Istanbul. Monty Armstrong announced that the extended CFP had been posted for the 2012 WHA conference in Albuquerque. Gilbert reported that as president he will develop a focus group for teachers at the conference.

Andrea announced that the 2013 conference will be in Minneapolis, and plans are for the 2014 conference to be held in Costa Rica at the University of Costa Rica.

**Membership:** Benjamin reported that there were 1226 members as of December 2011. The number drops during each year and comes back up again, but has consistently stayed above 1200. The majority are college and university teachers rather than school and community college teachers. The College Board AP Reading generates members every year who sign up for one year and then don't stay.

Gilbert suggested that one of the problems for the WHA regarding K-12 teacher membership is that the WHA provides free resources that do not, therefore, generate membership. Paul Jentz is working on a data base of community college teachers with one of his colleagues, Grace Chee.

Please contact Benjamin and Gilbert with any ideas regarding membership.

**Outreach:** Gilbert reported that Jentz and others have worked with the Utah and Minnesota school systems to advise them regarding History Reform Boards. WHA members are critical in discussion regarding thinking about world history on most of the state boards.

The new world history e-journal from the Midwest Affiliate, *Middle Ground*, was announced, with Hong-Ming Liang as its editor.

**World History Bulletin:** The *World History Bulletin* is still going strong.

Upcoming special issues include: teaching & learning; court societies; international law.

**World History Connected:** WHC is generating over 300,000 readers a month. It is a great place to get people to read your work.

Upcoming special issues include: reconceptualizing Asia; art and world history.

**Prizes:** Merry Wiesner-Hanks said that the submissions are much better at the graduate level than undergraduate level. The prize committee is trying to figure out how to better communicate with undergraduate teachers of world history to encourage students to submit. Students have to be members of Phi Alpha Theta or the WHA, but they can join after submission.

Paper prize announcements have been posted on H-Net, but the WHA needs to get prize announcements out through all publications.

The World Historian Student Essay Competition for High School and Community College Students sponsored by Mark Welter was recently instituted. Wiesner-Hanks offered some good suggestions on the logistics of this prize so it doesn't overwhelm the committee as some teachers are submitting the essays of their entire class.

Gilbert pointed out that Mark Welter is a devoted teacher of world history and has put his support behind several prizes.

**Announcements, Questions, and Comments:** Micheal Tarver asked what happened in the last couple of years that has caused the financial loss for the year.

Gilbert responded that there were two issues to do with meetings. First, Istanbul had no registration fee so it didn't generate income, and the San Diego conference was held at a hotel, which increased expenses, with a smaller attendance than previous years.

He further stated that the Executive Office workers are marvelous and are underpaid. Even with an increase to 75% FTE, they are still working more than a full-time job. However, redressing this issue by bringing them to 75% FTE has increased expenses. Andrea pointed out that every year the WHA has an overseas conference it costs the organization in terms of revenue. Domestic conferences are more profitable. Membership has stayed stable but costs are rising. Yet we don't want to raise dues. Neel said that we are in better financial shape than we had projected on our five-year plan despite the economic down turn. Gilbert commented that the WHA has stayed in healthier shape than most other academic organizations.

Andrea pointed out that Winston Welch is imaginative in terms of generating revenue for the WHA – travel insurance, credit card, Amazon, etc. The Secretariat is also very frugal.

Andrea responded to queries regarding local conference advertising by saying that they tried to get local businesses in Milwaukee to engage but they didn't see the WHA as relevant to their market.

WHA might want to have joint meetings with other organizations. Jared Poley commented that exhibitors didn't show up at Beijing, and this lost revenue for the WHA.

Benjamin reported that the Bill Gates Foundation is donating money for the Albuquerque conference for Big History because it has synergy with their project.

Gilbert said that the WHA is talking to publishers for Albuquerque. There are plenty of inexpensive hotels and WHA is encouraging people to rent cars and travel regionally in New Mexico. Meeting at a high school shows the WHA's commitment to K-12 teachers, as is the case with meeting at a community college in Minneapolis in 2013. The WHA is trying to find inexpensive and "desirable" venues to attract participation. Welch had reported the need to increase in registration fees for the viability of the organization to meet expenses with income. This is usually OK for college teachers, but may be more difficult for community college and high school teachers (although this is not always the case). As usual, there are conference registration fee waivers for those in financial need.

Andrea pointed out that the cost of food has risen appreciably over the last few years. The Albuquerque conference will include three catered luncheons and a banquet as well as the usual coffees and receptions.

Gilbert said that the WHA doesn't have a tiered system for membership because K-12 teachers often make more than college teachers. There are discounts for students, retirees, and the unemployed.

Gilbert announced that a world history organization is being organized for the region of Latin America/ Caribbean. Gilbert reported that the WHA became member of CISH through its membership in NOGWHISTO. Pat Manning and David Christian have been temporary WHA representative members but he is keen to make these appointments official for five and three year appointments, as decided by the EC.

Gilbert declared that in the future, the Executive Council meetings will not be held at the AHA; the sole annual meeting of the EC will be at the WHA's annual conference. All other discussions will be done through email. Affiliates meetings will, however, continue to be held at the AHA meeting. Other WHA activities at the AHA will include sponsored panels and a reception. This is, therefore, the last WHA Business Meeting at the AHA, and the Executive Committee would like to thank the AHA for its support. He thereupon closed the meeting and invited everyone to the WHA reception.

Respectfully submitted,  
Kerry Ward



## The 2012 World History Association Teaching Prize

### PURPOSE

The World History Association is committed to working across all grade levels to maintain the use of current world history research in classroom practice.

### THE SOURCES

Current historical research most frequently found in books and scholarly articles is a significant inspiration for our teaching. The WHA is committed to encouraging teachers at all levels to turn to substantive scholarship for content ideas. We are seeking lessons either inspired by or directly related to recent World History scholarship, including but not limited to pieces in the *Journal of World History*, published within the last ten years.

### ELIGIBILITY

The competition is open to teachers in grade levels K-12. Submissions for the Teaching Prize must be from current members in good standing of the WHA. So as to encourage new recipients, winners from anytime in the past three years, as well as committee members, are ineligible.

### GUIDELINES

These are suggestions to guide your thinking. Feel free to add to the prompt questions below.

#### 1. Brief introduction

- For whom is the lesson intended?
- What is the purpose of the lesson?
- How does it fit into your curriculum, or larger plan?
- What are the lesson's links to current research?

#### 2. Procedures for implementation

- What preparatory work is assigned?
- How does the lesson work? (procedure, number of sessions, etc.)
- How do you know that students have "gotten it?"

#### 3. Conclusion

- Reflections on how it went in your class?
- (Student work and/or student reflections are encouraged)
- How might you adapt it to more advanced or lower level students?
- What other possible conceptual links do you see?

### Possible Appendices:

1. Appendix of relevant handouts or supporting materials used
2. Annotated list of available resources for students and teachers

#### SUBMISSION INSTRUCTIONS & DEADLINE

E-mail your lesson plan to Jen Laden, Chair, Teaching Prize Committee, at [murphyladen@aol.com](mailto:murphyladen@aol.com).

**Submission deadline: MAY 1, 2012.**

Late entries and entries that do not adhere to the guidelines will be disqualified.

#### AWARDS

The winning lesson will be published in the fall *World History Bulletin*. The designer of the winning lesson will receive a \$750 cash award, sponsored by Oxford University Press, and recognition at the WHA Annual Conference, usually held in June. A one-year membership renewal in the WHA and a certificate will also be included with the prize. Educators may have a letter announcing the award sent to their supervisors and local press.

In the event that the panel of judges considers that the quality of the entries does not warrant the awarding of any prize, the judges shall have the right to make no awards available.

#### QUESTIONS

Questions about the competition should be e-mailed to Jen Laden: [murphyladen@aol.com](mailto:murphyladen@aol.com).

The World History Association is a community of scholars, teachers, and students who are passionately committed to the study of the history of the human community across regional, cultural, and political boundaries.

**World History Association Executive Council Meeting  
Minutes**  
**American Historical Association Conference**  
**Chicago Marriott Downtown, McHenry Room. 3:00-6:00 pm.**  
**Friday, 6 January, 2012.**

**Convened at 3:00 PM**

**ATTENDANCE**

**Present:** Alfred J. Andrea (Outgoing President), Marc Gilbert (Incoming President), Craig Benjamin (Incoming Vice-President), Winston Welch (Executive Director), Kerry Ward (Secretary), Carolyn Neel, Joel Tishken, Paul Jentz, Jared Poley, Mary Jane Maxwell, Patrick Manning, Monty Armstrong, Sarah Hamilton, Rick Warner, Matt Romaniello, Michael Tarver, Craig Lockhard, Ane Lintvedt, Anand Yang, Sharlene Sayegh.

**Apologies:** Jerry Bentley, Connie Hudgeons, Howard Spodek, Merry Wiesner-Hanks

**WELCOME**

President Andrea opened the meeting and welcomed all attendees. The meeting began with introductions, with Andrea particularly welcoming Matt Romaniello, Associate Editor of the *Journal of World History*, and Sarah Hamilton, a representative of the Ad hoc Graduate Student Committee.

Andrea called for a discussion of the June 2011 minutes of the Executive Council. No comments. Motion to approve, Craig Benjamin. Seconded, Jared Poley. All in favor.

**PRESIDENT'S REPORT**

Andrea thanked everyone on the Executive Council for the high honor of serving as president. He chose not to discuss successes of the last two years, preferring to suggest two areas of improvement for the future:

First, the Executive Council needs to take the lead on income generation, including promoting the WHA Capital One credit card. Andrea promised to write to Life Members to encourage them to give an annual donation.

Second, the WHA Secretariat needs to be brought up to full time, particularly as they are working far more than the 75% for which they are paid.

Craig Benjamin asks that minutes reflect Executive Council's gratitude to and thanks for Andrea's inspired leadership and friendship. The Executive Council responded with a unanimous "Hear, Hear" and a spontaneous round of applause.

**WHA, NOGWHISTO, & WORLD HISTORY NETWORKS**

Patrick Manning gave an overview of the state of world history scholarly organizations globally. He pointed out that the WHA was first organization for world history when it was established in 1982. The *Journal of World History*, established in 1990, was the first scholarly journal devoted to the field. The WHA sought to gain a space in the International Congress of Historical Sciences (CISH) and was rejected as it was not explicitly global in its organization. A second world history organization, the European Congress on World and Global History (ENIUGH) was established in 2005. At the 2006 WHA conference there were discussions about world history organizations being set up in Asia, Africa, and Latin America. In 2008 the Network of Global and World History Organizations (NOGWHISTO) was established, with the WHA a charter and the largest member. That year, the Asian Association of World Historians

was formed at Nankai University in China, with its first conference in 2009 at Osaka University and its second being planned in 2012 at Ewha Womans University in Seoul. The African Network in Global History—Réseau Africain d'Histoire Mondiale (ANGH/RAHM) was formed at the University of Ilorin in Nigeria with its first conference planned, but not realized, for Cairo during 2011 and a conference being planned at the University of Ouagadougou, Burkina Faso in 2013. A world history conference is being planned in Buenos Aires in Fall 2012, which may lead to the formation of a Latin American and Caribbean world history organization.

Manning pointed out that as an affiliate of NOGWHISTO, the WHA has an opportunity to participate in forming the next program for the 2015 CISH conference in Jinan, China.

The WHA is the majority member of NOGWHISTO, and Andrea has been corresponding with Mattheis Middell at Leipzig for the CISH conference. WHA delegates will probably be members of the CISH conference steering committee.

The WHA's membership in NOGWHISTO and CISH paralleled its new membership in the American Council of Learned Societies (ACLS), which was achieved in 2011.

**MOTION:** That the WHA appoint two presidential appointments to serve as delegates with staggered terms one for five and one for three year term to NOGWHISTO to represent the WHA and report back as sitting ex officio members of the Executive Council. This will be made a permanent office in the WHA. The delegates will give annual report. Term to begin 7 Jan 2012.

Members of the EC enquired about who would appoint the delegates and what meetings they would be attending. Andrea pointed out there is no funding for delegates' travel.

Manning pointed out he is on the board of NOGWHISTO, along with Middell and Katya Naumann from ENIUGH. He pointed out that it will be work for the organizations to maintain their global as well as regional responsibilities but that the groundwork has already been made and the connections are ongoing. CISH has ties to UNESCO and NOGWHISTO could be part of the future planning for the restructuring of UNESCO.

Neel seconded the motion and suggested annual reports from the delegates.

No further discussion. The motion carried unanimously. Representatives to NOGWHISTO to be named by the incoming president at WHA Business Meeting.

N.B. Patrick Manning and David Christian appointed to five and three year terms as official representatives of the WHA to NOGWHISTO.

**GRADUATE STUDENT AD HOC COMMITTEE**

Sarah Hamilton was introduced to the EC as the representative from the Graduate Student Ad hoc Committee, which came out of discussions at the WHA conference in Beijing this summer. The aim of the committee is to create a forum for graduate students of world history and particularly to provide support for dispersed graduate students who don't necessarily have colleagues or mentors at their institutions. The graduate students were overwhelmed by the support for their ad hoc committee from the WHA's officers.

The EC brainstormed ideas for increasing graduate student membership from its current 10% and to encourage participation in meetings and journals. Welch will organize a graduate student lunch

or reception at the upcoming WHA conference. There is currently a mentoring initiative. Benjamin suggested a series of panels aimed at graduate students for the annual meeting: writing a world history dissertation; job searches and new hires in world history; submitting articles to world history journals. Other suggestions included: space in the Bulletin for a column on graduate student issues; a blog or email group; graduate participation on the WHA Facebook page; encourage participation in the graduate student essay prize; using NEWHA's graduate student mentoring program as a model for the WHA.

Manning pointed out that the World History Center at the University of Pittsburgh has had graduate student dissertation workshops for the past two years. The conclusion was that it should be a permanent workshop migrating among relevant institutions. Northeastern University in Boston is the next logical step. Participating doctoral institutions could make a small contribution to keep it going. It could be supplemented every couple of years by an alumni meeting to create a cohort – something run by and for graduate students.

Andrea and a fairly large committee that he formed are presently creating a bibliography of world history publications for the ACLS. As he and Hamilton pointed out, graduate students are involved in that committee. He has had discussions with Anand Yang that the bibliography might be a launching pad for an NEH grant to create a multi-language bibliography of world history publications.

Gilbert moved to end the ad hoc status of the Graduate Students Committee so that it becomes a permanent member of the EC. Seconded by Jentz.

No further discussion. Passed with unanimous approval.

Officers of the Graduate Students Committee to be named by the incoming president tomorrow.

N.B. Sarah Hamilton named Chair of Graduate Students Committee.

Neel reminded the EC not to forget undergraduate involvement.

#### **TREASURER'S REPORT**

Winston Welch gave the Treasurer's Report on behalf of Howard Spodek. There was negative profit this year despite 50% increase in revenue. Book exhibitors didn't attend the annual conference in Beijing, which made a big impact on annual income.

The new mix of memberships has allowed for slightly lower-cost memberships.

Jackie Wah is up to 75% employment but still not adequately paid for her workload.

The WHA abandoned pursuing a bank line of credit because of personal liability issues.

Benjamin pointed out that he has secured a commitment from BGCreativity3 to contribute \$5K for the next WHA conference with the possibility of another \$5K.

The symposium model is proving very successful for revenue compared to cost.

The EC has a financial stewardship obligation to the WHA to encourage all members to give and to generate potential funding from other sources.

Benjamin questioned the higher registration fee for the annual conference in Albuquerque. Welch said it was necessary for financial

viability of the WHA, since the two main revenue sources are membership and conferences, and membership fees have not been raised for a few years. The fee was calculated on past trends of income and expenses, and the fee includes lunches for delegates, and three receptions that people have come to associate with WHA conferences. The fee also subsidizes students and it is comparable with other ACLS conferences. Guest passes will still be available. Registration fee waivers are available as well.

Jentz pointed out that the conference fee is the least expensive cost relative to airfare and accommodation, and it is not likely to be a deterrent. Many people get conference fee funding from their institutions.

Armstrong reiterated that the WHA should do more to reach out to high school teachers.

Andrea responded to discussion about other forms of funding by pointing out that the WHA is looking into grant writing.

#### **EXECUTIVE DIRECTOR'S REPORT**

Winston Welch reported that it was a great year for the WHA with a great conference and symposium, stable membership numbers, and great volunteers.

The WHA was welcomed to the CEO conclave of ACLS. Everyone there was wondering about the future of scholarly associations.

Welch has a scholarship to attend the Association of Fundraising Professionals in Vancouver, which will be very useful.

He noted that a WHA Diversity Taskforce is being set up and asked for help.

Welch showed the online video nominating Jackie Wah for the University of Hawai'i's Outstanding Employee of the Year.

Andrea introduced a motion that the EC show its appreciation for the outstanding work of Winston Welch and Jackie Wah. Joel Tishken seconded.

Motion passed unanimously with a round of hearty applause.

#### **COMMITTEE REPORTS**

##### **CONFERENCES COMMITTEE REPORT**

Andrea reported that the WHA's 20<sup>th</sup> Annual Conference in Beijing was attended by over 600 people. The 21<sup>st</sup> conference is the WHA's first hosted by a high school, Albuquerque High School. Connie Hudgeons heads up the local arrangements. The 22<sup>nd</sup> conference in 2013 will be the first at a community college, North Hennepin Community College in Minneapolis. Paul Jentz is leading the local arrangements for 2013. The 23<sup>rd</sup> conference will be hosted by the University of Costa Rica and will be held in July 2014. The WHA is in conversation with San Francisco State University to host the 24<sup>th</sup> conference in 2015.

Andrea is in discussion with the Xi'an's Great Tang Western Market Museum for a co-sponsored symposium in the autumn of 2012, with a proposed theme of "The Silk Road in World History."

Andrea and Welch visited Notre Dame University in Fremantle, Western Australia, which will host a symposium on 3-5 April 2013 titled "Empire: Faith & Conflict".

Future symposia will extend the WHA's global reach, co-operation with overseas institutions, and help in creating a revenue stream. Symposia cannot in any way run as competitors to annual conferences.

Andrea is stepping aside as Conference Chair, a position he has held since 2004, stating “to everything there is a season.” Paul Jentz will chair the committee and continue planning 3-4 years in advance.

Gilbert reported on the wonderful success and organization of the symposium at Siem Reap, where 85 people submitted papers and 72-73 delivered. The symposium generated new memberships for WHA. There is excitement about organizing a symposium in Vietnam particularly aimed at Southeast Asian world historians.

Jentz suggested that the single greatest “invention” to come out of WHA is the success of the symposia and reiterated the need for advance planning.

Gilbert stated that the EC acknowledge Andrea was responsible for the first symposium, which took place in Istanbul.

Welch and Gilbert reported that there is interest in having symposia in Japan, India, Singapore, Vietnam, and the United Arab Emirates.

Andrea wants the EC to consider that after 2014 the WHA might want to abandon the formula of holding a conference outside the USA every third year because of their expense and lower revenues. Symposia generate more funding. He suggested that the WHA organize one international symposium every year.

Gilbert stated that symposia can potentially be profitable by generating income through registration and fund raising initiatives that aren't possible for the annual meeting.

Yang pointed out there is a problem with abandoning international conferences because the WHA would be diminishing its international presence. The annual conference is for everyone whereas the symposia are field specific.

Rick Warner stated that the EC needs to recognize that most of the WHA membership can't afford to attend the annual conferences when held abroad.

Andrea introduced a motion that the WHA agree to continue discussion with Xi'an's Great Tang Western Market Museum for a co-sponsored symposium in late 2012.

Benjamin enquired further about the funding for the conference.

Andrea said the conference organizers will invite world class scholars on the Silk Road and then issue a call for papers. Those invited would have all their expenses covered. Those who present through the call for papers will have all their in-country expenses paid.

Welch pointed out that the Museum has its own staff to assist with organization, with a request to cover conference fees by the Museum to generate revenue for the WHA.

Benjamin seconded the motion. No further discussion. Passed unanimously.

#### **CONFERENCE PROGRAM COMMITTEE**

Andrea pointed out that the growing size of the WHA conferences has increased problems for the Program Committee but that its organizational systems are becoming more efficient.

Andrea introduced a motion that the EC express its gratitude to Maryanne Rhett and the Program Committee for the wonderful work they do.

Benjamin seconded the motion. Passed unanimously with gratitude.

#### **EXECUTIVE COMMITTEE**

No report. No outstanding business.

#### **MEMBERSHIP COMMITTEE**

Benjamin reported that WHA membership is very healthy and holding strong despite the economic climate. Academic membership is stable. K-12 teachers aren't joining in large numbers, however. The WHA is not providing services that attract large numbers of K-12 teachers. Many teachers join at the AP reading and then drop out the next year.

The WHA does not require that presenters at the conference be members, but the conference fee differential make membership more attractive.

Andrea pointed out that as members are subsidizing the conference, non-members should not be subsidized for the conference and should pay a higher registration fee. Moreover, if the WHA chose, there is no legal problem to insisting that people be members in order to present.

Benjamin suggested that a survey on Survey Monkey might help to figure out how to attract more members from a variety of groups.

Tarver said that the reality and problem is that when the WHA joined up with *World History Connected (WHC)*, this e-journal was offered as a free service to the entire K-12 community rather than a perk of membership. WHC has shifted the K-12 teachers into being serviced by the WHA for free rather than helping to generate memberships.

Gilbert pointed out this is the same as the new journal *Middle Ground*. WHC has a monthly readership of over 300,000 but that systemic problems within the school system have enormously affected K-12 teachers and especially the teaching of world history.

Benjamin pointed out that the College Board invests in the WHA conference by sponsoring two panels on AP World History.

Gilbert stated that there is a teacher focus meeting before the conference in Albuquerque. There's also a poster sessions integrated in the conference as part of the book & reception area.

Tishken said that at the 2000 conference, research panels followed by teaching panels on same theme generated effective participation.

Welch said that the WHA is planning full-scale outreach to high school teachers in Albuquerque, particularly local K-12 teachers.

Benjamin suggested that the College Board might subsidize participation by K-12 teachers and that he'd approach Allison Thurber. He reiterated he was happy to stay on as chair of the membership committee and will groom a successor in time for his presidency.

Hamilton said she'd like to help recruit grad students.

#### **NOMINATING COMMITTEE**

Andrea referred to the committee report on behalf of Kieko Matteson and solicited questions and comments.

Andrea moved that the EC offers its gratitude to Kieko Matteson for a job well done as Chair of the Nominating Committee.

Benjamin second. All agreed.

#### **BOOK PRIZE COMMITTEE**

No further questions or comments.

#### **STUDENT PAPER PRIZE**

Gilbert suggested adding someone from the Graduate Student

Committee onto the Student Paper Prize Committee.

#### **TEACHING COMMITTEE**

Andrea pointed to possible ways that the WHA can serve teachers through resources and networking, and called for further suggestions.

Welch said that a “members only” page for access to resources was not necessary at this time, but could be added in the future if exclusive content were to be developed.

Neel agreed, particularly if it was not as useful as *WHC*.

Armstrong pointed out that the WHA needs to be careful about teaching resources because they are sometimes plagiarized.

Gilbert suggested that when people ask “why join the WHA” answer because it lobbies for the critical content of teaching world history in the U.S.

Welch said that the top two reasons people join professional organizations is that they feel a professional obligation to advance the field and to network with other people.

#### **JOURNAL OF WORLD HISTORY**

Matthew RomanIELLO presented the report on behalf of Jerry Bentley. He said that the 25<sup>th</sup> anniversary issue is being planned. *JWH* funds might be used for a workshop to highlight the journal’s achievements.

Gilbert said that the WHA needs to be part of the discussion on the 25<sup>th</sup> anniversary events and suggested planning a symposium.

#### **WORLD HISTORY BULLETIN**

Jared Poley reported that the *WHB* is expanding and doing well. There is an upcoming volume on “teaching and learning” and others are planned on court societies, transnational families, and international law. *WHB* is open to calls for special issues.

Gilbert stated that the WHA needs to coordinate advertising for forthcoming issues.

#### **WORLD HISTORY CONNECTED**

Gilbert said that there were issues on Hawaiian history, reconceptualizing Asia, the scholarship of Andre Gunder Frank, art in world history, and a pedagogical panel from Siem Reap on teaching Southeast Asian history as world history.

The New AP world history exam is being implemented, and *WHC* is committed to providing teachers with resources.

#### **AFFILIATES REPORT**

Paul Jentz wants to congratulate the Midwest Affiliate on its first competitive election. He drew attention to the affiliates’ membership numbers as these organizations connect people to the WHA. Regional conferences are vital to growing and sustaining smaller networks of WHA scholars and teachers and encouraging new members for the WHA.

Benjamin congratulated Jentz for doing an excellent job as founding president of the Midwest Affiliate.

California and Northeast affiliates are doing OK and starting to work together.

Mary Jane Maxwell, secretary-treasurer of the New England Regional WHA (NERWHA) is bringing her students to its meetings and generating their involvement. A revitalized NERWHA currently has over 60 members, and is holding well-attended symposia at its new institutional home, Salem State University in Salem, MA.

The Texas affiliate is struggling.

Poley pointed out that the Floridians have abandoned their attempt to create a regional affiliate and are being incorporated into the Southeast affiliate. Future conferences will address diversity issues as regional conferences go to different kinds of institutions. SEWHA has a lot of grad student members.

The Mountain West affiliate is keeping an online connection but does not have an active organization at this time.

Gilbert reported that he and Andrea are making a presentation to affiliates at a meeting for the WHA affiliates at the AHA meeting. Craig Lockhard was keynote speaker to the Hawai’i affiliate meeting and his address will be published in *WHC*.

#### **OLD BUSINESS**

No old business.

#### **NEW BUSINESS**

Gilbert suggested that we hold a single annual meeting of the WHA’s Executive Council at the WHA annual conference in June/July rather than holding a second meeting of this body at the AHA’s January meeting. The EC could arrive a day early to the WHA annual conference and conduct other business online. Newly elected members would then begin their duties as online members of the EC in January. The WHA would still have a presence at the AHA through panels and a reception.

Neel pointed out that the Seattle retreat accomplished more because it was a sustained, all-day discussion, so having the EC meet a day early at the WHA conference was a good idea.

Andrea said that as members of the EC, we have the right to make all decisions through the medium of the e-list, and electronic discussions tend to be longer and more thoughtful than brief discussions conducted at our biennial meetings. Moreover, two committee reports per year are not necessary. Furthermore, there are no WHA panels this year at the AHA, and we need to promote this presence more assertively.

Benjamin suggested that this issue be discussed in Albuquerque and that the EC put forward a motion to miss the next AHA.

Welch pointed out that Kieko Matteson stressed that for the new members of the EC that it is an obligation to come to only one meeting per year rather than the current two—a positive factor when recruiting candidates for office.

Gilbert also wants to discuss conference venues be vetted according to desirability of venue to attract people and that we search further for cheaper alternative accommodations.

Andrea and Welch said that the WHA always organizes a range of accommodations. There are a wide variety of accommodations in Albuquerque, and shuttles may be provided from the Hotel Albuquerque to the high school. The second conference hotel, the Embassy Suites, is next door to the conference venue.

Motion for adjournment, seconded, approved.

Meeting adjourned at 6:00 p.m.

Respectfully submitted,

Kerry Ward



**The 2012 Challenge Awards for Innovative Pedagogical Activities  
for K-12 and Community College Teachers  
Sponsored by Mark Welter | Presented by the World History Association**

The World History Association, through the generous support of Dr. Mark Welter, is offering two awards for innovative *activities* that reach students, especially in challenging situations. A prize of \$1,000 will be awarded in each category; one to a teacher in the K-12 teacher category and one to a community college instructor.

In sponsoring these awards, Dr. Welter seeks to encourage teachers and instructors to show how they have employed a variety of activities that sharpen perspectives, provoke discussion, and expand curiosity about aspects of world history. He wishes to reward those innovative teachers who transmit the message of world history through activities that promote exploration, as well as deeper understanding of human diversity, interdependence, and cultural interaction -- the commonalities and mutual borrowings among the human community. Such activities will enrich and supplement, not supplant the standard curriculum and other pedagogical means. They are an attempt to introduce students to the human diversity, interdependence, and cultural interactions (often by way of mutual borrowings) inherent to world history.

**ELIGIBILITY & GUIDELINES**

Applicants, who must be members of the WHA, should include the following information and answer the overarching question:

How does this activity help students understand more fully the world history concepts of human diversity, interdependence, and cultural interaction?

Specifically, applicants need to include a 3-5 page overview of the activity in which the following questions are addressed, insofar as they are relevant:

- 1.) What is the specific socio-economic, academic, and/or cultural context in which the activity took place?
- 2.) Who are the students for whom the activity was crafted?
- 3.) Were the students heterogeneously or homogeneously grouped?
- 4.) Is the school located in a poor or affluent area?
- 5.) Does the activity meet state curriculum standards?
- 6.) How, if at all, is the activity interdisciplinary in nature?
- 7.) What instructional techniques did you use?
- 8.) How did you assess students' performance?
- 9.) In what ways have you reflected on your practice as a result of this lesson? What, for example, went well? What challenges did you encounter?

Model activities can be found on the WHA web site at [www.thewha.org](http://www.thewha.org).

## SUBMISSION INSTRUCTIONS

Please submit your materials by e-mail to Jen Laden, at [murphyladen@aol.com](mailto:murphyladen@aol.com). In the subject line of the e-mail write either: "Challenge Awards: K-12 Submission" or "Challenge Awards: CC Submission."

**Deadline: Entries must be received by JUNE 1, 2012.**

Late entries and submissions that do not adhere to these guidelines will be disqualified.

## AWARDS

Winners in each category will receive a \$1,000 prize, a one-year membership to the WHA, and a certificate.

In the event that the panel of judges considers that the quality of the entries does not warrant the awarding of any prizes, the judges shall have the right to make no awards available for that category.

## GENERAL INFORMATION

The World History Association reserves the right to publish in the *World History Bulletin* any activity (or portion thereof) submitted to the competition. It will do so solely at its discretion, but full acknowledgment of authorship will be given. If someone's activity is published, in whole or in part, the author will receive three (3) copies of that issue of the *Bulletin*.

Questions about the competition should be e-mailed to Jen Laden at [murphyladen@aol.com](mailto:murphyladen@aol.com).

## ABOUT DR. MARK WELTER

Dr. Mark Welter, a member since 1984, began teaching world history in 1963. After instructing at the secondary level for seven years, he earned a doctorate at the University of Minnesota. He then began teaching his self-authored world history course at St. Cloud State University. Today he instructs world history and world religion courses for the University of Minnesota Senior Citizens Program.

Dr. Welter's teaching is predicated upon the philosophy articulated by William H. McNeill that "Teaching world history is a high and noble undertaking because only world history offers the sufficient dimensions of space and time to elicit needed awareness of the world we all share."

**The World History Association is a community of scholars, teachers, and students  
who are passionately committed to the study of the history of the human  
community across regional, cultural, and political boundaries.**



## The 2012 World Historian Student Essay Competition Sponsored by Mark Welter | Presented by the World History Association

This is an international student competition that will be judged in two categories: K-12 students and community college students. A prize of \$500 will be awarded to a student in each category. Mark Welter, recognizing the importance of encouraging young scholars, has established this annual prize.

Each competitor will submit an essay that addresses the issue:

**"In what way has the study of world history affected  
my understanding of the world in which I live?"**

### ELIGIBILITY

The competition is open to students enrolled in grades K-12 in public, private, and parochial schools, and those in home-study programs. A separate category is open to students enrolled in the community college system. Membership in the World History Association is not a requirement for submission. Past winners may not compete in the same category again.

### CRITERIA FOR JUDGING

**The committee will judge papers according to the following criteria:**

1. Clear thesis
2. Elaboration on the thesis with specific, concrete, personal example(s).
3. Evidence of critical-thinking, such as synthesis and evaluation, when reflecting on the essay question.
4. Overall effectiveness of the student's ability to communicate what he/she thought about world history both before and after taking a course in it. In other words, how well has the student described the experience of being changed by a better understanding of world history?

**Areas for consideration in the essays may include, but are by no means limited by, the following:**

1. The relationship between humanity and the environment.
2. The exchange of ideas across cultures throughout history.
3. The impact of technology (agricultural, military, &communications) throughout history.
4. The implications of the increasing political, social, economic, and cultural interdependence of humanity.

### ESSAY GUIDELINES

**Length:** Submissions for the K-12 World Historian Award should be approximately 1,000 words. Submissions for the Community College World Historian Award should be approximately 1,500 words.

**Formatting:** Number all pages except for the title page, and all pages are to be double-spaced. Use 12 pt. Times New Roman font. All margins – left and right and top and bottom – are to be one inch. Submissions must be composed in Microsoft Word.

A title page should include the following identifying information: name, title of paper, home address, telephone number, e-mail address, and name of school.

All essays must be in English and must be the student's original work.

**Deadline: Entries must be postmarked by OCTOBER 1, 2012.**

Late entries and papers that do not adhere to these guidelines will be disqualified.

## SUBMISSION INSTRUCTIONS

### Class Submissions

Teachers who organize class submissions should mail or email all papers in one Word document, divided by student paper. Name and identifying information, see #2 below, should be listed at the top of the title page of each paper. Send a separate Word document with your name, school information, and the number of student papers you are submitting. Once you have organized your submissions, please follow the general instructions below.

### GENERAL SUBMISSION INFORMATION (For individual student submissions and group class submissions)

**To submit your materials by e-mail, send the following as separate attachments on the same e-mail (all attachments must be formatted in MS Word):**

1. Your essay submission
2. A page with identifying information (author, title of paper, home address, telephone number, e-mail address, and name of school.)

Send the e-mail to: [SmithSusan@District279.org](mailto:SmithSusan@District279.org)

In the subject line of the e-mail write either: "World Historian K-12" or "World Historian CC"

### To submit your material by mail:

Send five copies of the paper and five copies of the page with identifying information. In the lower left hand corner on the front of the envelope write either "World Historian K-12" or "World Historian CC"

Send these materials to: Susan Smith, Prize Awards Coordinator  
Maple Grove Senior High School  
9800 Fernbrook Lane N.  
Maple Grove, MN 55369

The World History Association reserves the right to publish in the *World History Bulletin* any essay (or portion thereof) submitted to the competition. It will do so solely at its discretion, but full acknowledgment of authorship will be given. If someone's essay is published, in whole or in part, the author will receive three (3) copies of that issue of the *Bulletin*.

Questions about the competition should be e-mailed to Susan Smith: [SmithSusan@District279.org](mailto:SmithSusan@District279.org).

## AWARDS

Winners in each category will receive a \$500 prize and a certificate. In the event that the panel of judges considers that the quality of the entries does not warrant the awarding of any prizes, the judges shall have the right to make no awards available.

Winners will be notified after December 1, 2012.

## ABOUT DR. MARK WELTER

Dr. Mark Welter began teaching world history in 1963. He has been a member of the World History Association since 1984. After instructing at the secondary level for seven years, he earned a doctorate at the University of Minnesota. He then began teaching his self-authored world history course at St. Cloud State University. Today he instructs world history and world religion courses for the University of Minnesota Senior Citizens Program.

Dr. Welter's teaching is predicated upon the philosophy articulated by William H. McNeill that "Teaching world history is a high and noble undertaking because only world history offers the sufficient dimensions of space and time to elicit needed awareness of the world we all share."

## *World History Bulletin* Special Issue

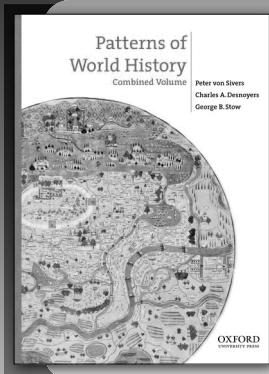
### Commodities in World History Fall 2012

#### Call For Papers

The World History Bulletin is accepting submissions for the Fall 2012 issue focusing on commodities in world history, under the guest editorship of Kevin Goldberg (Brown University). Authors may consider all aspects of historical scholarship, including research, pedagogy, or theory. Topics which engage any aspect of commodities, defined materially or theoretically, are welcomed. These might include, for example, issues of production, trade, and consumption, luxury goods vs. mass goods, diasporic entrepreneurial networks, ethnicity and trade, as well as traditional political and economic approaches to commodities. Course syllabi and commentary on teaching commodities in world history are especially desirable. Interested authors should contact Kevin Goldberg at [kevin\\_goldberg@brown.edu](mailto:kevin_goldberg@brown.edu).

Authors should keep in mind that the World History Bulletin's audience is composed of specialists in a diverse range of historical fields and periods, in addition to K-12 teachers. Thus, articles should be made as clear and accessible as possible for this diverse readership. The World History Bulletin publishes articles of varying lengths; though submissions between 500 and 5,000 words will be considered, we are especially interested in contributions of 1,500-3,500 words. The deadline for submissions is July 31, 2012.

## New and recent from OXFORD



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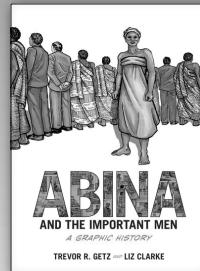
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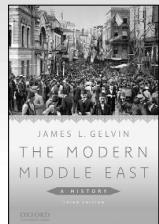
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A Graphic History

Trevor R. Getz  
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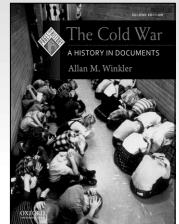
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A History  
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James L. Gelvin

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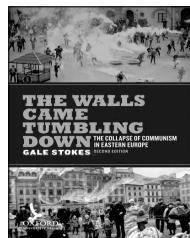
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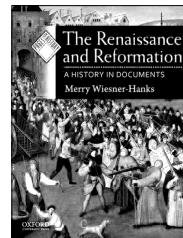
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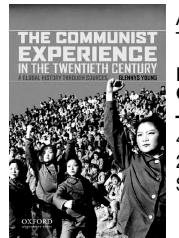
### The Renaissance and Reformation



A History in  
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Merry  
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176 pp. 95 illus.  
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Edited by  
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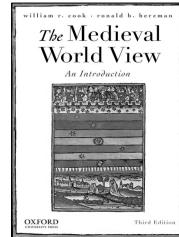
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